



Marine Economy Action Plan

Final Report



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Introduction

The purpose of this report is to assess the potential for development of the marine economy in Torbay and specifically to identify the opportunity and appropriate actions needed to deliver outcomes linked to the economic strategy for Torbay.

This report highlights a range of exciting opportunities for development of the marine economy in Torbay and identifies the key actions needed to take those opportunities.

The Story So Far

Over the past decade, the Council and partners have been successful in delivering a series of projects around Torquay Harbour working with its partners:

- A new pedestrian bridge has opened to popular acclaim;
- The Townscape Heritage Initiative has revitalised tired and neglected buildings that form part of Torbay's historic legacy;
- Additional facilities have opened for Harbour users such as the Town dock;
- Beacon Quay has been extended and refurbished to provide an attractive new public space with marine related businesses;
- New eating and cafe facilities and Living Coasts have been opened; and
- Rock walk has been re-opened and given a fresh look for the 21st Century.

In Brixham, the opening of a brand new fish market – equipped with the latest modern technology has allowed the port of Brixham to be sustained and thrive – with an excellent reputation for the quality of catch, enabling better prices for the sale of fish.

In terms of learning and skills, South Devon College has led the way, with the establishment and further development of the Noss Marine Academy as a centre of excellence for water-based outdoor education, training, and marine engineering.

And planned...

There are a number of initiatives which are currently being developed or investigated by the Torbay Development Agency (TDA), Tor Bay Harbour Authority or partners including:

- **Development of a 3rd Harbour for Torquay** –, development of a 3rd harbour for Torquay would provide opportunities for cruise ships to dock, as well as marine leisure operators (such as diving, fishing trips, kayaking etc);
- **Brixham Harbour Northern Arm Breakwater** – The construction of a Northern Arm Breakwater in Brixham would enclose the open water area of the outer harbour to provide calmer wave conditions and a safer harbour in all weather conditions, this would allow for increased use by existing users and development of further leisure opportunities (including additional marina facilities);
- **Development of a Watersports Centre of Excellence** – Providing world class facilities for a range of watersports including better land based facilities and parking for events. Potentially at Broadsands;
- **Re-development of Goodrington beach and area inland** – The proposed re-development of the Goodrington beach area is currently out to tender via the Official Journal of the EU;
- **Pontoon Moorings for Torquay's Inner Harbour** – to create additional space for visitors/residents to moor yachts;
- **A temporary boatyard in Brixham** – the Harbour Authority is currently preparing to issue a 10year lease for land for a boat yard in Brixham;

- **Development of a seafood processing park** – The TDA is currently investigating the development of a seafood processing estate;
- **Provision of fast ferry infrastructure facilities** – Torbay Council are currently preparing a bid to the Department of Transport for Local Sustainable Transport Funding to support the provision of fast ferry infrastructure;
- **2nd Stage of the Torquay Townscape Heritage Initiative** – To continue to make improvements to the visitor environment within Torquay; and
- **Sinking a Ship as a Diving Destination** - A local charity is planning to buy a ship from the MOD to sink as a diving destination in Tor Bay.

As well as physical infrastructure, there are a number of groups working towards the improvement of the marine economy and environment, including the Tor Bay Harbour Committee, Sea Torbay and South Devon Marine.

The Marine Opportunity

This research shows that there are notable opportunities to develop the marine economy in Torbay in order to make significant contributions to the economic development and wider strategic objectives of the council.

Torbay's marine environment is an important natural asset, but it also underpins the whole marine sector either directly or indirectly. Therefore protecting and enhancing this asset is fundamental to the success of further developing the marine economy – the environmental impact of any proposed actions is an important consideration.

The fishing sector is a mature sector and vitally important to the port of Brixham. The new fish-market has helped consolidate Brixham's position as one of the most important ports in England with an excellent reputation for the quality of its fish. Opportunities exist to provide better fish processing facilities in Torbay – thus improving the productivity of existing processors and potentially attracting inward investment. The fishing sub-sector represents an important opportunity for further product development, added value and promotion.

The marine tourism and leisure sector is important to the economy of Torbay directly, but also (through maritime events, marinas and boats on the water) forms part of Torbay's overarching tourism product and visitor experience. However, the sector is currently considered to be immature and investment to ensure Torbay's marine leisure product is able to compete with strong competition from around the UK and rest of the world. Opportunities such as that put forward by local charity to sink a ship off Torbay for use by divers and plans to develop a water sports centre of excellence will do much to improve the current offering.

The marine engineering sector is closely linked to the marine leisure sector and existing businesses provide an important service to boat owners, marina's and fishing boats in Torbay. South Devon College's marine academy at Noss is ensuring that marine engineering skills are available in Torbay and wider sub-region. The college's strong connections to local marine engineering businesses mean they serve the needs of local businesses as well as students. The lack of existing boat building facilities provides a barrier to growth of this sector

The opportunity in relation to marine renewable energy is limited for Torbay – Torbay does not have a marine renewable business base at this current time. However, it does have strengths in the hi-tech sector and marine engineering sectors which could be directed towards opportunities associated with the newly designated Marine Energy Park. It is recommended that TDA continue to engage with the Marine Energy Park partners to further understand and respond to opportunities and work with the area's advanced manufacturing sector to identify opportunities for these businesses.

Torbay's port infrastructure includes deep water harbours in Torquay and Brixham, which with investment in the necessary infrastructure, could provide an opportunity to support the Marine Energy Park. The infrastructure and facilities necessary (and any potential economic benefit) to support this sector should be explored further in the development of a Port Masterplan, already sanctioned by Tor Bay Harbour Authority.

Despite Torbay's limited cargo and port facilities, the Bay is an important staging post for ships travelling up the English Channel, its sheltered conditions means that ships often call

into the Bay to await further instructions or take on provisions. Supporting are businesses such as Marine and Towing Services, who provide ships with provisions, crew, charts and arrange servicing works if necessary. The nature of this work means that this sort of work has an important multiplier effect on the Torbay economy. The long term need to protect Paignton from rising sea levels may present an opportunity to examine the role of Paignton Harbour and its potential for use in relation to cargo handling, giving its close proximity to the rail network.

Torbay has also established a strong pleasure boat/cruises market, with several operators providing fishing trips, wildlife watching and other boat excursions. It will be important to ensure that any fast ferry services proposed do not displace activity from these established businesses.

Torbay currently attracts a number of visiting cruise ships each year which anchor in Tor Bay and transport passengers ashore to visit local attractions. Torbay Council is working to attract more cruise ships to the Bay. A third harbour for Torquay may provide the facilities required to attract more cruise ships as well as provide other facilities in relation to marine leisure.

Marine Science is not currently an established sector in Torbay. The development of knowledge infrastructure such as field stations and higher education provision may help create the conditions for the emergence of a marine science sector in the future – perhaps in relation to fisheries. Astra Zeneca is an important company in Torbay and their bio-medical work may present an interesting opportunity for development in relation to the ‘health corridor’ running from Exeter through Torbay to Plymouth and encompassing the Peninsula Medical school and Devon’s two universities.

However, whilst a sub-sectoral approach was adopted for the study an important finding from the consultation process were perceived opportunities from forming linkages between sub-sectors building on existing high quality products and services to create new niche products. The bringing together of people from different backgrounds to ‘mix-up’ ideas was thought to be an important part of this process.

Similarly, some actions had relevance to all sub-sectors, such as the need for a port masterplan to ensure an integrated coastal/sea zone.

Consultees also felt it was important that in moving the action plan forward, it was important to look beyond Torbay’s boundaries to the wider sub-region to identify further opportunities and collaboration potential.

Marine Economy SWOT

The analysis above and the evidence presented in the interim report highlight the following strengths, weaknesses, opportunities and threats.

Table 1: Over arching SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong marine tourism offer including <ul style="list-style-type: none"> ○ Many watersports events ○ Private sector operators and South Devon College ○ Excellent Bay for watersports ▪ Strong mainstream tourism offer ▪ Geopark status ▪ Living Coasts ▪ Strong pleasure boat/cruises market ▪ Unique bio-diversity and marine environment ▪ Strong advanced manufacturing sector ▪ Fishing science expertise ▪ Largest Fishing port in England (by value) ▪ Diverse, high value, quality catch ▪ Brand new state of the art fish market ▪ A small cluster of marine engineering businesses ▪ South Devon College – marine engineering provision 	<ul style="list-style-type: none"> ▪ Immature marine leisure sector ▪ Improvements needed in shoreside facilities (e.g. toilets, car-parking, showers, food outlets etc.) ▪ Lack of integration between maritime operators and mainstream tourism operators ▪ Improvements needed in launching facilities ▪ Current poor transport infrastructure into Torbay ▪ No marine science educational infrastructure ▪ Few marine science businesses ▪ Lack of boat building/repair facilities ▪ Relatively small fish processing sector ▪ Lack of fish processing units & cold storage facilities ▪ Limited marine renewable energy opportunities ▪ Lack of facilities/infrastructure for handling cargo/freight
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Integration of maritime leisure activities into generic brand/marketing activity ▪ Sinking a ship as an Artificial Reef ▪ Increase marina style mooring capacity ▪ Fast ferry service between Torquay and Brixham ▪ Attract more cruise ships ▪ Create watersports centre in Broadsands ▪ Torbay Week regatta ▪ Shell-fish farming ▪ Local fish supply chains and links with restaurants ▪ Marine clusters in Plymouth ▪ Marine biodiversity as a draw for divers and tourists ▪ CFP reform & MCZ 	<ul style="list-style-type: none"> ▪ Competition for watersports events from other destinations that have better facilities and are prepared to 'pay more and provide more for free' ▪ Recession impacting on demand for boats ▪ Significant fish processors in Cornwall who have benefitted from European investment ▪ Common Fisheries Policy reform ▪ Marine Conservation Zones? ▪ Better equipped ports for shipping in Plymouth and Teignmouth ▪ SAC

Marine Economy Strategy

Strategic Direction

In order that the Marine Economy Action Plan fits within the overarching context of the Economic Development Strategy, the **vision** for the marine economy action plan is that identified for Torbay as a whole

'To bring about the physical and economic regeneration of Torbay and deliver the benefits to the local community'

With the following **aim** for the marine economy to help fulfil the vision:

For Torbay to have a vibrant, strong and successful marine economy, which sustains the marine environment and provides employment opportunities for people of all ages and backgrounds.

The **strategic objectives** for the marine economy are therefore in line with the economic strategy themes:

- **To stimulate and attract investment** - Improving infrastructure and facilities across the marine economy in Torbay to stimulate business growth and investment.
- **To improve business performance** - Increasing marine business formation and survival rates, encourage increases in productivity, help businesses develop and access new markets and support key sectors such as commercial fishing and aquaculture, marine tourism and leisure and marine engineering.
- **To raise skills and improve opportunities** - Addressing the barriers to working in the marine sector in Torbay, improving skills and employability and stimulate continued development of the workforce.

Complementing these strategic objectives are three **key principles** that stakeholders identified as important in moving forwards:

- **Capitalising on recent and planned investment** – Ensuring that new actions complement and add value to recent investments;
- **Cross sector development and collaboration for added value** - Creating an externally facing culture where businesses look to work with businesses from other parts of the marine economy, Torbay's wider economy and the South West;
- **Addressing specific sub-sectoral needs and opportunities** – The consultation process revealed a number of sector specific needs and opportunities and it is important that these are addressed to maximise opportunities within each sub-sector.

The **outcomes** to be achieved from this plan are:

- Increase the number of businesses operating in the marine economy;
- Increase the number of people employed in the marine economy;
- Increase the proportion of people employed all year round in the marine economy;
- Improve the productivity of existing marine economy businesses;
- Stimulate or identify new markets for marine businesses to provide goods and services for;
- Attract new marine economy businesses into Torbay;
- Enhance the existing tourism offer;
- Enhance and sustains the environment and Tor Bay's natural assets; and

- Enhance opportunities for disadvantaged people in Torbay.

Strategic Actions

Objective Principle	To stimulate and attract investment	To improve business performance	To raise skills and improve opportunities
Capitalising on recent and planned investment	<ul style="list-style-type: none"> ▪ Feasibility study into the creation of a third harbour/pier and supporting infrastructure ▪ Improve infrastructure and facilities to allow and encourage fast ferry services and visiting cruise ships ▪ Create Northern Arm Breakwater in Brixham ▪ Create centre of excellence for water sports or water sports/maritime centre ▪ Building on investment in fishing sector, develop fish processing park: <ul style="list-style-type: none"> ○ Identify and develop sites for fish processing, ○ Test feasibility of (1) cold storage facilities, (2) High pressure pasteurisation plant and ○ Encourage start up/inward investment. 	<ul style="list-style-type: none"> ▪ Establish one group to bring together maritime leisure stakeholders and businesses, to represent the needs of the sector and develop maritime leisure products ▪ Develop brand and marketing of the fish processing sub sector: <ul style="list-style-type: none"> ○ Develop brand for home and international market; ○ Promote local sustainably caught fish (local campaign, accreditation, marketing materials, fish market tours); and ▪ Encourage more local fishmongers/stalls selling local fish in Torbay. ▪ Research new uses for waste from fish processing or fish meal plant 	<p>Building on investment by South Devon College in developing marine based provision, develop marine centre of excellence to support all sub sectors (this would link with other key developments such as the planned centre of excellence for water sports).</p>
Cross sector development and collaboration for added value	<ul style="list-style-type: none"> ▪ Development of a port master plan which draws together maritime and coastal activity and planning to ensure an integrated coastal zone. ▪ Develop a fishing museum or heritage attraction linking history, life at sea, food, art, culture. 	<ul style="list-style-type: none"> ▪ Develop business forum bringing together all sub-sectors to find creative solutions. Provide business advice and facilitate business to business funding. ▪ Develop off season events and events that link fishing and tourism e.g. trawler race or 'fishstock'; ▪ Create tourism products that (1) link diving/fishing/boating and marine science (e.g. eco- holidays) and (2) link fishing and eating opportunities e.g. links with local restaurants; ▪ Identify niche opportunities to explore marine science in relation to fisheries. 	<p>Encourage employer driven approach and partnership with funders/providers to:</p> <ul style="list-style-type: none"> ▪ Clarify needs and demands for employment and skills - through research/survey; ▪ Employer influence on future provision, ▪ Promote sector attractiveness and employment pathways for young people and members of the local community (inc. those not in work); and ▪ Promote and encourage workforce development inc. apprenticeships.
Addressing specific sub-sectoral needs and opportunities	<ul style="list-style-type: none"> ▪ Protect existing marine engineering facilities close to the water from re-development in non-marine uses ▪ Provide boat yard land in Brixham and research and understand demand for facilities in the wider area. ▪ Encourage scientific research (and data collection) of Torbay's marine environment/fisheries ▪ Sink a ship as a diving destination ▪ Improve the waterfront tourism offer 	<ul style="list-style-type: none"> ▪ Explore how South Devon Marine might be sustained, Working with other marine cluster groups such as Maritime Plymouth ▪ Encourage advanced manufacturing sector to explore opportunities within marine science ▪ Develop specific events (Torbay Week as the English Riviera's flagship maritime event) and water based packages. ▪ Create innovative promotional material and integrate into central destination marketing 	<ul style="list-style-type: none"> ▪ Encourage marine businesses to take on apprentices ▪ Test feasibility of a marine science field station. ▪ Establish marine biology courses ▪ Promote Geopark marine environs ▪ Encourage work based diplomas ▪ Create greater community involvement in watersports through support for volunteering.

Detailed Evidence Base

This section reviews the evidence collected as part of the marine economy action planning process to present a clear picture of the current situation within Torbay's marine economy.

Torbay

Torbay has a beautiful coastline, and was recognised as a Global Geopark in 2007. Torbay consists of three towns, Torquay, Paignton and Brixham, which together make up a diverse and lively resort. Traditionally a tourism driven resort, declining visitor numbers have required a re-evaluation of Torbay's identity in order to take the economy forward. Torbay's environment is its biggest selling point for both visitors and residents alike. Key to this are the 18 sandy beaches and the 22 miles of coastline which make up Torbay. Coupled with seafront gardens, Victorian and Georgian architecture and two country parks at Cockington and Berry Head. The total population of Torbay is currently estimated to be 134,000, making it one of the larger urban economies within the South West.

The enclosed harbours, the Bay and coastal waters around Tor Bay are vitally important to the sustainable future of the local community. Our coast and adjacent seas are an obvious resource and the Bay itself is a valued but under-utilised asset. The harbour areas are used for commercial activities as well as many smaller craft, with numerous tourism and recreational opportunities, as well as sites of cultural and historic interest, which meet many of our economic and social needs. Brixham is the most important fishing port in England and Wales measured by the value of catch landed. The harbour provides areas for the safe and efficient conduct of the fishing industry, including the provision of fish landing facilities and a fish market [for the conduct of fish auctions] for which the Harbour Authority are responsible for the upkeep and maintenance.

At the same time the Bay contains distinctive and important habitats and these support a diverse range of species, which we need to protect and conserve. Integrating socio-economic and environmental/ecological factors is crucial to our long-term sustainability and already features in several sectoral strategies of relevance to the Harbour and our coast.

The Marine Environment

Tor Bay has a natural environment of high significance with internationally and nationally important habitats and species. An area within the Bay is now designated a candidate marine Special Area of Conservation which, through the EU habitats and Species Directive protects Tor Bay's submerged and partially submerged sea caves and rocky reefs from damaging activity. An area of the Bay has also been recommended by the 'Finding Sanctuary' Stakeholder Group to be a Marine Conservation Zone. An area of coastal waters off Berry Head National Nature Reserve is designated an Area of Special Protection for seabirds during the nesting season. Tor Bay also has nationally important seagrass beds which are a UK priority Biodiversity Action Plan habitat and protected species including seahorses, which are protected under the Wildlife and Countryside Act 1981. The coastline also has a high level of nature conservation designated sites and the whole of Torbay administrative area is designated a Global Geopark Site. (Source, Torbay Coastal Zone Management Plan)

Marine Infrastructure and Facilities

This report has examined the existing maritime infrastructure and facilities present in Torbay and sought to understand what additional infrastructure and facilities are required from discussion with stakeholders.

Sub-Sector	Existing Infrastructure & Facilities	Infrastructure and Facilities required
Commercial Fishing/Fish Farming	<ul style="list-style-type: none"> ▪ Brand new fish-market in Brixham ▪ Fish Farm off Elberry 	<ul style="list-style-type: none"> ▪ Additional fish processing units ▪ Cold storage ▪ Pasteurisation plant
Marine Engineering	At the current time, Torbay's Marine Engineering businesses service customers' boats either on the water or through hauling out onto hard standing – there are no dedicated facilities for repair work.	<ul style="list-style-type: none"> ▪ Boat building/repair facilities
Maritime leisure	<ul style="list-style-type: none"> ▪ Leisure mooring facilities - Torquay (850), Brixham (800) and Paignton (250) ▪ Harbour Launching facilities ▪ Exceptional beaches (most Blue flag and coastal award beaches in England 2011) ▪ Multi-access dinghy launching facilities 	<ul style="list-style-type: none"> ▪ Improvements to parking and launching infrastructure especially for maritime events ▪ More visitor mooring facilities ▪ Re-fuelling facilities ▪ Winter hauling out/storage facilities ▪ Large area to support major ground base required by national sailing events and festivals ▪ Improvements to shore side facilities (e.g. toilets, car parking, showers etc.)
Marine Science	As yet, Torbay does not have any specific marine science infrastructure or facilities.	<ul style="list-style-type: none"> ▪ Development of a marine science field station/study centre.
Renewable Energy	Established harbour infrastructure in Torquay and Brixham in particular and sheltered deep water anchorage for ship repairs and inspections. Torbay's harbours are supported with excellent stevedore and ship agent's services and offer easy access to the road network (especially when the South Devon Link Road is complete).	Further investment in the harbour infrastructure and marine engineering facilities could put Torbay in a strong position to support the marine energy park.
Short Sea Shipping, Cruise Ships and Ferries	<ul style="list-style-type: none"> ▪ Little shipping/cargo handling infrastructure. ▪ Cruise ships currently anchor in the Bay and ferry passengers ashore using tenders. ▪ There are a number of pleasure craft operators in the Bay. 	<ul style="list-style-type: none"> ▪ Improved infrastructure to encourage more visiting cruise ships ▪ Infrastructure to allow fast ferry service to operate ▪

A key consideration of any proposals to provide new infrastructure or facilities is where such facilities should be located. Some of the infrastructure and facilities listed above could be located anywhere within Torbay; other facilities need to be located alongside the water or close to it. Some of these facilities align well with existing land uses and economic activity, whereas others may present a threat to existing activities (because they are noisy, smelly or present another nuisance). Development of a **port masterplan** (within the context of the Local Development Framework/Neighbourhood plan) to work through these competing priorities is therefore a priority action.

Marine Business Activity

Torbay has a strong history of marine business activity, with long established businesses from family businesses and self employed individuals to multi-national companies.

Whilst making exact comparisons between sub-sectors is difficult, the most significant sub-sector is the fish/aqua-culture which is a mature sector of the Torbay economy and especially important to the port of Brixham. Similarly the marine engineering sub sector is relatively mature, if small in size. There is evidence of an emerging cluster of maritime leisure businesses serving traditional and newer marine leisure markets. However, with the exception of Astra Zeneca, marine science and marine renewable have a limited existing presence in Torbay.

Sub-Sector	Business Activity
Commercial Fishing/Fish Farming	<p>Brixham has 216 vessels in its administration. The fleet has a higher proportion of larger vessels than average for England with 75% of the fleet being 10m or under compared to 82% of the English fleet.</p> <p>A report by Ekos Consulting and Nautilus consultants in 2003¹ showed that 23% of the workforce of Brixham were dependent on fishing.</p> <p>There is an emerging aquaculture sector farming mussels on ropes in the Bay.</p> <p>Similarly there is a small processing sector.</p>
Marine Engineering	<p>A search of Experian's database showed 30 businesses operating in this sector in Torbay.</p> <p>Consultations suggest that the leisure sector is the most important market for marine businesses operating in Torbay. Attendance at the SW British Marine Federation Annual General Meeting revealed that marine leisure businesses in the South West are feeling the impact of the recession with less people buying boats and existing owners attempting to minimise the cost of owning a boat.</p> <p>Despite this, there is continued demand for berthing facilities within Torbay and any expansion of these would increase demand for marine engineering services.</p> <p>Some marine engineering businesses in Torbay now operate on a 'mobile' basis to reduce overheads and enable them to travel to clients around the country.</p>
Maritime Tourism and leisure	<p>A search of the Experian business prospector database found 43 companies operating in Torbay</p>
Marine Science	<p>Identifying marine science businesses is a difficult process as there are no business classification systems which directly cover such a niche area. A search on Experian's database for companies which participate in marine surveying, oil and gas or research into natural sciences brought up less than 5 businesses.</p> <p>One notable company is Astra Zeneca, which has a world leading facility in Brixham. The laboratory is principally a bio-medical facility which tests drugs and other chemicals for their impact on the environment. One element of this is testing on sea water.</p>

¹ A socio-economic study of the fishing industry in the South West of England – Ekos Consulting (UK) Ltd and Nautilus Consultants. 2003.

Renewable Energy	<p>A search of the RegenSW marine energy supply chain directory found 79 companies in Devon. One (a PR company) was based in Torbay.</p> <p>However, Torbay's strong advanced manufacturing sector may be in a position to capitalise on low carbon opportunities in the wider renewable energy sector and the absence of South Coast ports that can serve the proposed Marine Energy Park presents an opportunity for Torbay to become involved in servicing the offshore renewable industries.</p>
Short Sea Shipping, Cruise Ships and Ferries	<p>Torbay has a long established passenger pleasure craft industry, mainly transporting visitors on local trips, connecting the 3 towns and linking to neighbouring destinations. There are a number of local ferry and excursion businesses operating in the Bay providing marine transport links, excursions, ferry services, fishing trips, wildlife watching as well as boat hire.</p> <p>Marine Towage Services (MTS) has been operating in Brixham since 1920 and primarily provides support services to ships anchored or passing through or by Tor Bay. This includes supporting the ships with any new provisions, equipment, changing/supporting the crew, piloting services, using divers to survey hulls and salvage operations.</p>

Marine Skills Provision

South Devon College is the main training provider in the area and it offers a number of marine courses through its Marine Academy at Noss Marina. The academy provides a centre of excellence for water based outdoor activity and marine engineering. There are currently plans to expand this facility at Noss.

The college is also planning to start providing marine biology courses which would build capacity within the marine science area. In terms of renewable energy, the college has courses in Building Services and Renewables and is building a new Energy Centre. No courses were identified in relation to shipping or commercial fishing. The nearest 'seafish' accredited training courses are provided by Western Training Association in Plymouth.

Sectoral Perspective

This section provides a brief overview of the six sub-sectors listed above to provide:

- A description of the subsector;
- National trends, issues and opportunities;
- The situation in Torbay:
 - The size, value and key businesses operating in Torbay;
 - Existing facilities & infrastructure;
 - Skills provision;
 - Existing or planned projects and initiatives; and
 - SWOT analysis.

Commercial Fishing including Fish Farming

Description of Sub-Sector

This sub-sector relates to the value chain around the fishing industry, which includes:

- Commercial fishing (catching)
- Fish farming
- Wholesale/Retail and transportation
- Fish processing

Ancillary activities include businesses directly dependent upon such activities such as fishing boat construction and maintenance, and the manufacture and repair of fishing gear.

Secondary activities include the processing of catches for human consumption or animal feeds and the retailing of the products.

Table 2: Business Classification Codes – Commercial Fishing and Fish Farming

SIC codes	Thompson codes	Yell Codes
03:1 Fishing	Fishermen	Fishermen
10:20 Processing and preserving of fish, crustaceans and molluscs	Fish Smokers & Curers	Fish Salesmen
03:2 Aquaculture	Fish Farms & Hatcheries	Fish Farms
13:94 Manufacture of cordage, rope, twine and netting	Fish Merchants - Wholesale	Fish Wholesalers
	Fisheries' Consultants	Fisheries Consultants
		Fisheries Authorities

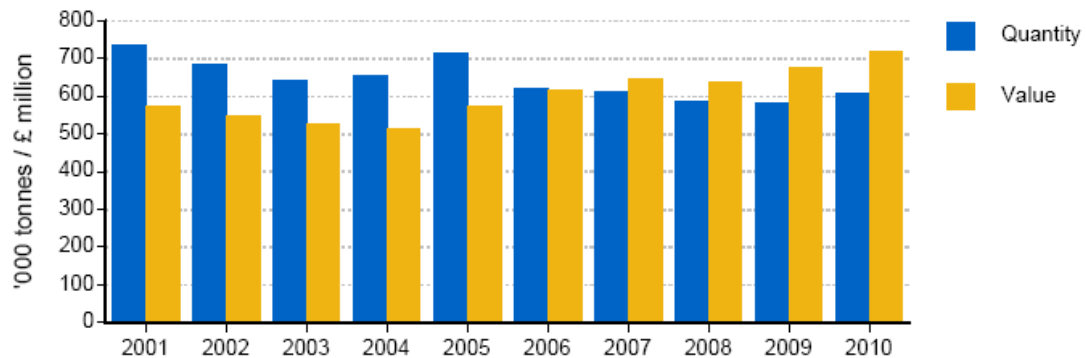
National Trends, Opportunities and Constraints

The Marine Management Organisation is the organisation responsible for compiling sea fishing statistics, all data presented in this section of the report has been drawn from the UK Sea Fisheries Statistics 2010, unless otherwise stated.

Fishing is an important part of the economy, accounting for 5.9% of the GVA for the agriculture, forestry and fishing sector, more in coastal areas and ports with fishing fleets. However, it is an industry which has been in long term decline – reflecting changes in fish stocks, management through quotas, technical measures and conservation activities. In recent years, the decline in the number of vessels has continued with a fall from 7,721 in 2001 to 6,477 in 2010 (16% fall) and a similar fall in the number of fishermen, with 12,700 in 2010, down 15% since 2001. As well as a reduction in the number of vessels, the average size of vessels has become smaller, both in terms of capacity and power (down 22% and 24% respectively since 1996) – reflecting decommissioning exercises and adaptation by fishermen to changing fishing opportunities.

Figure 1 below shows that whilst the quantity of catch has fallen by over 100,000 tonnes, the value has increased by over £100million since 2001. By species landings of demersal species (cod and haddock) have fallen significantly since 1994 (63 and 64% respectively), as have pelagic species (mackerel, 33% and herring 36%). Landings of shellfish have increased (scallops 63%, crab 37% and nephrops 27%). These trends reflect adaptation by fishermen towards species with less stringent quota controls such as shellfish.

Figure 1: UK vessels landing into the UK and abroad: 2001 to 2010 (Source, MMO)



In 2010, the UK imported 703 thousand tonnes of fish (excluding fish products), with a value of £2,250 million. It exported 516 thousand tonnes, leaving a trade gap of 187 thousand tonnes. Landed prices of fish rose by an average of 7.4 per cent on 2009, with the fish component of the retail price index rising by 6.1 per cent. In 2010, imports were highest for cod, tuna, shrimps and prawns and haddock. The UK's main exports were mackerel, salmon and herring.

Aquaculture is the farming or culturing of aquatic organisms (fish, molluscs, crustaceans and plants). The UK industry is split into two categories, fin-fish farming and shellfish cultivation. Almost all of the UK's farmed fin-fish currently comes from Scotland, due to the need for relatively deep and sheltered waters of high environmental quality (such as lochs). Shellfish farming however, is much more evenly distributed around the UK (including Torbay). Total shellfish cultivation was valued at about £23million in 2007 and was mainly mussels with a small quantities of pacific oysters and clam. An increase in the commercial exploitation of species where cultivation is in its infancy, such as lobster and cockle, is likely to further increase the value of the sector. The aquaculture sector is growing, increasing by 132% between 2000 and 2006 and expected to grow by a further 116% between 2006 and 2016. Employment in shell-fish cultivation was estimated at around 416 full time and 418 part time staff.

The **fish processing sector** is widely distributed around the UK coast, with the largest factories near major fishing ports in Scotland and Humberside. The productive seas assessment estimates that the GVA for the processing sector is £490m and exports worth £601m in 2007². The sector is reported to have comprised 573 businesses and employed 18,180 people in 2005³.

The fishing industry is highly regulated, coming under the control of the Common Fisheries Policy (CFP). This is a highly centralised regulatory instrument which sets catch limits and control measures on an annual basis. The European Commission (in its green paper of CFP reform) identified five failings of the CFP: fleet overcapacity; unclear policy objectives; short-term decision-making; insufficient responsibility given to the industry; and poor compliance.

The UK Government is making the case for radical reform of the policy to ensure fisheries are managed for the long term. Key elements of the UK proposal include the introduction of a regionalised approach to decision making, catch limits instead of landing limits to reduce

² Productive Seas – Feeder Report – Fisheries. DEFRA.

³ Productive Seas – Feeder Report – Aquaculture, DEFRA

discards, and long term management plans based on sound science and integrated with wider marine policy.

The outcome of this reform process, due to come in to force in January 2013 will have significant implications for the UK fishing industry.

The Situation in Torbay – Fishing and Fish Farming

Commercial Fishing and Fish Farming																					
Natural Resources	<p>Brixham is one of the most important fishing ports in England. Brixham lands 12.8 thousand tonnes of fish, second only to Plymouth. However, the value of the catch (£21.7m) is not exceeded by any other port in England and Wales.</p> <p>The graph below shows that shellfish are an important part of the catch for Brixham, accounting for approximately 50% of the tonnes landed and a similar proportion of the value. What distinguishes Brixham from other English ports is the higher proportion of catch from higher value Demersal species, which represent 32% of the landings and 48% of the value. Key species high value species landed in Brixham include Lemon Sole, Sole, Cod and Bass, although high volumes of other (lower value) species such as Gurnard and Plaice are also caught.</p> <table border="1"> <caption>Chart Data: Composition of Catch</caption> <thead> <tr> <th>Category</th> <th>Demersal (%)</th> <th>Pelagic (%)</th> <th>Shellfish (%)</th> </tr> </thead> <tbody> <tr> <td>Tonnes - England</td> <td>25</td> <td>15</td> <td>60</td> </tr> <tr> <td>Tonnes - Brixham</td> <td>32</td> <td>10</td> <td>58</td> </tr> <tr> <td>Value - England</td> <td>48</td> <td>10</td> <td>42</td> </tr> <tr> <td>Value - Brixham</td> <td>48</td> <td>10</td> <td>42</td> </tr> </tbody> </table>	Category	Demersal (%)	Pelagic (%)	Shellfish (%)	Tonnes - England	25	15	60	Tonnes - Brixham	32	10	58	Value - England	48	10	42	Value - Brixham	48	10	42
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Strategic Context	<p>The <i>Economic Strategy</i> notes the importance of the fishing sector and suggests there is scope for the development of the sector and fish farming with further local added value and processing. Similarly the <i>Inward Investment</i> strategy states that local production and added value processing is limited and that opportunities for fish farming should be explored. Enhancement of the Brixham brand is considered to be important.</p> <p>The <i>Tor Bay Harbour and Maritime Strategy</i> highlights the importance of the catching sector in Brixham and highlights opportunities to:</p> <ul style="list-style-type: none"> Support the emerging aquaculture industry; Link fishing to destination marketing, connecting quality seafood with a quality resort; and Promotion of exports. 																				
Businesses	<p>Brixham has 216 vessels in its administration⁴. The fleet has a higher proportion of larger vessels than average for England with 75% of the fleet being 10m or under compared to 82% of the English fleet. A report by Ekos Consulting and Nautilus consultants in 2003⁵ showed that 23% of the workforce of Brixham were dependent on fishing. There is an emerging</p>																				

⁴ UK Sea Fisheries Statistics, 2010

⁵ A socio-economic study of the fishing industry in the South West of England – Ekos Consulting (UK) Ltd and Nautilus Consultants. 2003.

	aquaculture sector farming mussels on ropes in the bay. Similarly there is a small processing sector.
Facilities and Infrastructure	The brand new fish market was opened on the 29 th of March 2011.
Skills Provision	No courses at South Devon College. Although Western Training Association based in Plymouth is an approved provider of 'Seafish' accredited training courses.
Planned Projects	<ul style="list-style-type: none"> ▪ Northern Arm breakwater, Brixham ▪ Lease to be made available for boat yard in Brixham (summer 2012) ▪ TDA currently investigating feasibility of developing a 'seafood processing' industrial estate
Issues and Constraints	<p>Brixham is part of the Western Channel, where a sole recovery zone was established from February 2004 which put in place restrictions on equipment use for larger vessels and numbers of days at sea.</p> <p>Proposed Marine Conservation Zone along the length of the Tor Bay coast, SAC Management Measures.⁶.</p>

Table 3: Commercial Fishing and Fish Farming SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Brixham fish market ▪ Diverse high value catch (not too reliant on quotas) ▪ Exceptional quality catch ▪ Exporting high proportion of catch (60%) ▪ Serving top quality restaurants around the world (including celebrity chefs) ▪ Brixham brand name 	<ul style="list-style-type: none"> ▪ Small size of processing sector ▪ Ability of sector to see alternative opportunities ▪ Lack of processing units ▪ No commercial boat yard facilities ▪ Lack of additional cold storage facilities ▪ Local workforce not attracted to fish processing sector
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Adding value through direct sales ▪ Promoting the market ▪ Maritime and Fisheries fund ▪ Sustainable inshore fisheries ▪ Local supply chains and links with restaurants ▪ Increased shell-fish farming ▪ Artisanal/locally produced products ▪ Create lifestyle branding (like Cornwall) ▪ Reform of the Common Fisheries Policy* ▪ Marine Conservation Zones* ▪ Special Area of Conservation ▪ Fishing Heritage and culture 	<ul style="list-style-type: none"> ▪ Reform of the Common Fisheries Policy* ▪ Marine Conservation Zones* ▪ Special Area of Conservation ▪ Lack of finance/credit for expanding businesses ▪ Significant processors in Cornwall who have benefited from convergence funding ▪ Imported fish based products from China ▪ Perceived high business rates for industrial units

*Note – Lack of final proposal for a reformed CFP and Marine Conservation Zones mean that it is not clear if these will be opportunities or threats for the fishing sector.

⁶ Finding Sanctuary, Final Recommendations, Summer 2011

Conclusion – Commercial Fishing and Fish Farming

The fish sector is a mature sector and vitally important to the port of Brixham. The new fish market has helped consolidate Brixham's position as one of the most important ports in England with an excellent reputation for the quality of its fish. Opportunities exist to provide better fish processing facilities in Torbay – thus improving the productivity of existing processors and potentially attracting inward investment. The fishing sub-sector represents an important opportunity for further product development, added value and promotion.

Marine Engineering

Description of the Sub-Sector

Marine engineering refers to the engineering of boats, ships, oil rigs and any other marine vessel. It can refer to:

- The engineering of vessel's propulsion systems;
- The engineering of structures to support vessels; and
- A ship's engineering department, an organizational unit that is responsible for the operating the propulsion systems and
- the support systems for crew, passengers and cargo.

Marine Engineers operate in four main sectors:

- Naval - (e.g. warships, submarines and high value systems and equipment);
- Leisure – (e.g. yacht manufacturers, equipment manufacturers, marinas and holiday companies);
- Commercial (e.g. (merchant shipbuilding, fishing vessels, maintenance, repair and conversion, marine equipment, systems and services, ship recycling, and design, development and research); and
- Offshore Renewables – (Wind, wave and tidal power manufacturers, distributors, installers and supporting supply chains).

This report focuses on opportunities associated with leisure and commercial, given Torbay's limited involvement with the naval sector. Offshore renewable engineering is addressed in the marine renewable section of the report.

Table 4: Business Classification Codes – Marine Engineering

SIC 2007	Thompson Classifications	Yell Classifications
30.1 Building of ships and boats	Boatbuilders & Repairs	Boat Builders & Repairs
33.12 Repair and maintenance of ships and boats	Boat Cleaning Services	Marine Consultants & Services
	Marine Services	Marine Electronics
	Marine Electrical & Electronic Equipment Manufacturers	Marine Engine Mfrs & Suppliers
	Marine Electrical Services	Marine Engine Repairs
	Marine Engineering Equipment Manufacturers	Marine Engines
	Marine Engineers	
	Marine Equipment & Supplies	

National Trends, Opportunities and Constraints – Marine Engineering

The *UK Marine Industries Strategic Framework*⁷ describes the marine sector as an industry with an excellent heritage and track record, based on a long history of academic excellence, innovation, advanced manufacturing and craftsmanship. Today, knowledge based activity is as important as manufacturing. With capabilities that span the whole lifecycle of products – research, concept, product development, including exportability, detailed design, manufacture, world-wide in service support, and disposal.

⁷ The UK Marine Industries Strategic Framework- BIS March 2010

The UK *Marine Industries Alliance's Strategy for Growth*⁸ identifies a number of opportunities for growth:

- Growth in global trade (and emerging markets) driving the merchant ship market;
- Increasing middle classes around the world driving demand in the leisure sector;
- New technologies offering ways to improve competitive advantage (such as ambient intelligence, materials, design, energy scavenging, sensors and computing and energy technologies); and
- Future UK and international regulations (e.g. safety enhancements, emissions reductions and electricity market reform) can be seen by most as opportunities rather than threats – so long as they are anticipated and prepared for in good time.

The British Marine Federation⁹ estimates that there are approximately 4,200 businesses operating in the leisure marine sector in the UK, employing approximately 32,500. The sector is estimated to have revenue of £2.963billion, of which 38.7% is international trade. The South West is the second largest UK region, accounting for 30.5% of revenue, second only to the south east (31.3%).

Boat manufacture and distribution is the largest part of the sub-sector representing 36.2% of revenues, followed by consumer services (34.4%), Equipment manufacture and distribution (17.6%), Engines and Systems (8.2%) and Business services (3.9%). In employment terms, consumer services becomes the most important, employing 42.5% of FTE employees.

International trade is important to the sector, but is especially important to boat manufacture where it represents 71.7% of revenues. International trade has decreased in Europe and North America, but continues to rise steadily in emerging markets.

Mirroring the decreases in demand highlighted above, industry revenues have decreased from 2008/9 by 10.5%, with the most significant decrease seen in the boats manufacture and distribution sector (-9.5%) and equipment and engine systems (-11.8%). Revenues for services to consumers were more stable with a fall of just 1.3%.

The commercial sector is made up of merchant ship building, maintenance, repair and conversion; marine equipment, systems and services; ship recycling; and design development and research. The commercial sector has an annual turnover of around £1.6bn and employs around 36,000 people. UK companies have been effective in growing market share in the Far East and see further opportunities there. Key opportunities for growth in this sector are ship repair and conversion.¹⁰

⁸ A Strategy for Growth for the UK marine Industries. UK Marine Industries Alliance. Sept 2011

⁹ UK Leisure, superyacht and small commercial marine industry. Key Performance indicators 2009/10.

¹⁰ UK marine industries Strategic Framework. BIS March 2010.

The Situation in Torbay – Marine Engineering

	Marine Engineering
Natural Resources	Proximity to the sea and target markets (leisure marinas and the fishing industry)
Strategic Context	Marine Engineering is mentioned in the <i>Economic Strategy</i> as a sector where there is potential to provide greater support.
Business Context	<p>A search of Experian’s database showed 30 businesses operating in this sector in Torbay.</p> <p>Consultations suggest that the leisure sector is the most important market for marine businesses operating in Torbay. Attendance at the SW British Marine Federation Annual General Meeting revealed that marine leisure businesses in the South West are feeling the impact of the recession with less people buying boats and existing owners attempting to minimise the cost of owning a boat.</p> <p>Despite this, there is continued demand for berthing facilities within Torbay and any expansion of these would increase demand for marine engineering services.</p> <p>Some marine engineering businesses in Torbay now operate on a ‘mobile’ basis to reduce overheads and enable them to travel to clients around the country.</p>
Facilities and Infrastructure	Consultees have identified a lack of boat building/repair facilities in the Torbay area.
Skills Provision	<p>South Devon College offers a number of courses in this area through its Marine Academy at Noss Marina on the River Dart.</p> <ul style="list-style-type: none"> ▪ Basic Outboard Maintenance ▪ Boat Building Maintenance Certificate Level 2 ▪ Level 2 Certificate in Boat Building & Maintenance ▪ Level 2 Certificate in Marine Engineering ▪ Marine Engineering Certificate Level 2 ▪ Marine Engineering Certificate Level 3 ▪ Marine Engineering NVQ 2 (Part-Time)
Planned Projects	<ul style="list-style-type: none"> ▪ Development of a Northern Arm Breakwater for Brixham ▪ The Harbour Authority is currently preparing to issue a 10year lease for land for a boat yard in Brixham.
Issues and Constraints	Government planning and guidance states that coastal sites should be safeguarded for activities that require a coastal location ¹¹

¹¹ Planning Guide for Boating Facilities – British Marine Federation and RYA

Table 5: Marine Engineering SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ A small cluster of marine engineering businesses ▪ A strong hi tech sector ▪ South Devon College ▪ A strong fishing sector ▪ Sheltered deep water anchorage for ship repairs or inspection 	<ul style="list-style-type: none"> ▪ Lack of consumer demand for boats during recession ▪ Lack of boat repair workshops/facilities close to the water
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Creation of more mooring spaces will increase demand for marine engineering services ▪ Working with the CAMIS project¹² in relation to marine cluster development ▪ Working with other marine clusters such as Maritime Plymouth 	<ul style="list-style-type: none"> ▪ Reduced activity from South Devon Marine since SWRDA funding cuts

Conclusion – Marine Engineering

The marine engineering sector is closely linked to the marine leisure sector and existing businesses provide an important service to boat owners, marina's and fishing boats in Torbay. South Devon College's marine academy at Noss is ensuring that marine engineering skills are available in Torbay and wider sub-region. The college's strong connections to local marine engineering businesses mean they serve the needs of local businesses as well as students. The lack of existing boat building facilities provides a barrier to growth of this sector.

¹² CAMIS – Channel Arc Manche Integrated Strategy – An Interreg IVA France (Channel) – England Programme. The aim of CAMIS is to draft and implement an integrated maritime policy in the channel space whilst encouraging cooperation schemes. The project aims to identify cluster activities and also facilitate further cluster activities using best practice identified.

Marine Science

Description

There is no formal definition of marine science sector and the term does have a number of interpretations. The UK Government in its Marine Science Strategy interprets marine science as the understanding of how marine systems work, how they impact on us and how we impact on them. The Association of Marine Scientific Industries (**AMSI**) however has a broader membership profile covering the use of science in all maritime activities including:

- Oil and Gas exploration;
- Defence;
- Renewable Energy;
- Environmental monitoring;
- Academic Research;
- Security;
- Oceanography;
- Surveying; and
- Meteorology.

For the purposes of this research, we have explored opportunities for Torbay arising from both pure marine science and associated maritime science.

Table 6: Business Classification Codes – Marine Science

SIC 2007	Thompson Classifications	Yell Classifications
72.1 Research and experimental development on natural sciences and engineering	Marine Surveyors Oil & Gas Exploration Supplies & Services Oil & Gas Extraction Environmental Engineers Environmental Consultants	Surveyors - Marine Oil & Gas Exploration Oil & Gas Exploration Companies Oil & Gas Exploration Eqpt Environmental Consultants

National Trends, Opportunities and Constraints – Marine Science

The publication of the UK Marine Science strategy in 2010 signalled the importance of marine science to the UK in helping to resolve issues such as food security, energy security and climate change. The UK's research institutions play a leading role in oceanographic and marine research, leading international investigations into global problems.

The Research Councils spent £67m on marine science in 2006/07¹³ and the value of the knowledge generated from the marine environment was estimated to be £453m for 2006. The UK has a number of significant research institutions including:

- The Centre for Environment, Fisheries and Aquaculture Science (CEFAS);
- National Oceanography Centre (NOCS) – University of Southampton;
- Plymouth Marine Laboratory (PML) – University of Plymouth;
- Proudman Oceanic Laboratory (POL) – housed at Liverpool;
- The Scottish Association of Marine Science (SAMS); and
- The Sir Alistair Hardy Foundation for Ocean Science (SAHFOS).

¹³ Charting Progress 2, Productive Seas Feeder Report, Section 3.13 Research and Development. Defra

Marine science is expected to continue to be an important area for continued research funding given its importance with respect to issues such as energy security, food security and climate change. The wider marine sector has recently received Government support in the form of a UK Marine Industry Growth Strategy¹⁴ which defined how industry, government and academia will collaborate to exploit global marine opportunities. A key element of this strategy is to identify the priorities for marine technology and innovation investments by Government and industry. This work is being led by the Technology Strategy Board¹⁵, who plan to open a competition for research and development grant funding in 2012, targeting the issues that have the greatest potential to benefit UK marine businesses.

As well as academic institutions, private businesses and organisations also operate within the sector – often developing new technologies and equipment to support research efforts etc.

The marine science sector is a small niche sector in the UK, with approximately 200-250 companies nationwide¹⁶. The Annual Review of UK Marine Scientific Industries 2011 conducted by (AMSI) found that the sector makes an important contribution to the economy with an estimated market size of £1.1bn/year and employing over 14,500 people. The survey found:

- Over 65% of companies experienced growth over the past year;
- Over 70% had a positive outlook and expecting to increase staff numbers of the next 12 months;
- 90% of companies predicted an overall increase in the Marine Science market over the next 12 months, compared to 71% in 2010 and 50% in 2009;
- Barriers to growth in relation to export controls, skills shortages, finance and tax;
- Important market sectors were offshore oil and gas, renewable energy, defence and environmental monitoring; and
- Europe remains a significant region for UK export in marine technology with the Middle East and Asia/Pacific emerging as strong growth areas.

The Situation in Torbay – Marine Science

Marine Science	
Natural Resources	Tor Bay has a natural environment of high significance with internationally and nationally important habitats and species. An area within the Bay is now designated a candidate marine Special Area of Conservation which, through the EU Habitats and Species Directive protects Tor Bay’s submerged and partially submerged sea caves and rocky reefs from damaging activity. An area of the Bay has also been recommended by the ‘Finding Sanctuary’ Stakeholder Group to be a Marine Conservation Zone. An area of coastal waters off Berry Head National Nature Reserve is designated an Area of Special Protection for seabirds during the nesting season. Tor Bay also has nationally important seagrass beds which are a UK priority Biodiversity Action Plan habitat and protected species including seahorses, which are protected under the Wildlife and Countryside Act 1981. The coastline also has a high level of nature conservation designated sites and the whole of Torbay administrative area is designated a Global Geopark Site. (Source, Torbay Coastal Zone Management Plan)

¹⁴ UK Marine Industries Strategic Framework. Marine Industries Leadership Council, March 2010

¹⁵ Technology Strategy Board, Press Release 19th September 2011. Technology Strategy Board to support innovation and growth in the UK’s marine industry.

¹⁶ Personal Communication, Paul Ridout, British Marine Federation. Nov 2011.

Strategic Context	The <i>Torbay Economic Strategy 2010-2015</i> highlights a potential opportunity to support the marine science sector, especially through the inward investment route. Likewise the <i>Inward Investment strategy</i> ¹⁷ identifies environmental science/marine science as a priority sector using the presence of Astra Zeneca's Brixham Environmental Laboratory to attract new investors.
Businesses	<p>Identifying marine science businesses is a difficult process as there are no business classification systems which directly cover such a niche area. A search on Experian's database for companies which participate in marine surveying, oil and gas or research into natural sciences brought up less than 5 businesses.</p> <p>One notable company is Astra Zeneca, which has a world leading facility in Brixham. The laboratory is principally a bio-medical facility which tests drugs and other chemicals for their impact on the environment. One element of this is testing on sea water. One potential niche area of marine science is fisheries research, with the presence of the Marine Management Organisation (DEFRA) and the Inshore Fisheries & Conservation Authority (IFCA) in Brixham, there may be an opportunity to grow a fisheries research cluster.</p>
Facilities and Infrastructure	As yet, Torbay does not have any specific marine science infrastructure or facilities. Plymouth University is the closest marine science institution.
Skills Provision	South Devon College is planning to start marine biology courses. Discussions are on-going with Exeter University in relation to developing a field study centre exploring the area's biodiversity.
Planned Projects	
Issues and Constraints	Ensuring that other developments do not compromise Tor Bay's natural marine science resources.

¹⁷ Business Growth in Torbay. Torbay's Inward Investment Strategy.

Table 7: Marine Science SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Unique bio-diversity and marine environment ▪ Strong advanced manufacturing sector ▪ Living Coasts ▪ Fishing science expertise (MMO and IFCA) 	<p>No marine science educational institutions within the bay</p>
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Emerging plans for S. Devon college to start marine biology courses ▪ Development of a bio-medical/bio science cluster utilising Astra Zeneca, the hospital and Peninsular medical schools ▪ Development of educational activity tied in with watersports (such as diving) ▪ Strong Advanced Manufacturing sector ▪ Development of fisheries research cluster ▪ Links with Exeter University – Geopark Marine Activity and study 	

Conclusion – Marine Science

Marine Science is not currently an established sector in Torbay. The development of knowledge infrastructure such as field stations and higher education provision may help create the conditions for the emergence of a marine science sector in the future – perhaps in relation to fisheries. However, the sector is unlikely to grow in the short or medium term without significant public sector investment. Astra Zeneca is an important company in Torbay and their bio-medical work may present an interesting opportunity for development in relation to the ‘health corridor’ running from Exeter through Torbay to Plymouth and encompassing the Peninsula Medical school and Devon’s two universities.

Marine Tourism and Leisure

Description of Marine Tourism and Leisure

This sector refers to the leisure and recreational use of the marine environment and includes, angling, sailing, boating, nature-watching, scuba-diving, surfing, kayaking and swimming.

The Watersports and Leisure Participation Survey¹⁸ identifies the following marine related leisure and tourism activities:

- Sailing Sports – Small Sail boat activities, Yacht Cruising, Small sail boat racing, yacht racing
- Power Sports – Using personal watercraft, motor boating, power boating, canal boating
- Manual Sports – Canoeing, Water Skiing, Rowing/sculling
- Other Activities 1– Coastal walking, outdoor swimming, spending general leisure time at the beach
- Other activities 2 – Surfboarding, Kitesurfing, Angling (from a boat), Angling from the shore, Cliff climbing and coastering, Leisure sub-aqua diving.

These are supported by a range of ancillary economic activities including construction, manufacturing and management. Downstream activities that benefit from leisure and recreation include accommodation and other services. Cruises and ferry journeys have been included under the sub-heading short sea shipping and ferries.

Table 8: Relevant Business Classification codes – Marine Tourism and Leisure

SIC 2007	Thompson Classification Codes	Yell Classification codes
93.1 Sports activities 32.3 Manufacture of sports goods 93.22 Other amusement and recreation activities	Fishing & Angling Equipment - Manufacturers & Distributors Fishing & Angling Equipment Diving Equipment & Supplies Diving Schools Cruiselines Kites Yacht Brokers Sailing Schools Windsurfing Boat Sales Boat Equipment Boat Charter, Rental & Leasing Boat Trips & Excursions Marinas & Boat Moorings	Fishing Tackle Mfrs & Wh'salers Fishing Tackle Diving Schools & Equipment Marinas Fisheries (Sport) Kites Surf Shops Sailing Instruction Boat Moorings Canoeing and Kayaking Yacht Eqpt Yacht Chandlers Yacht Charterers

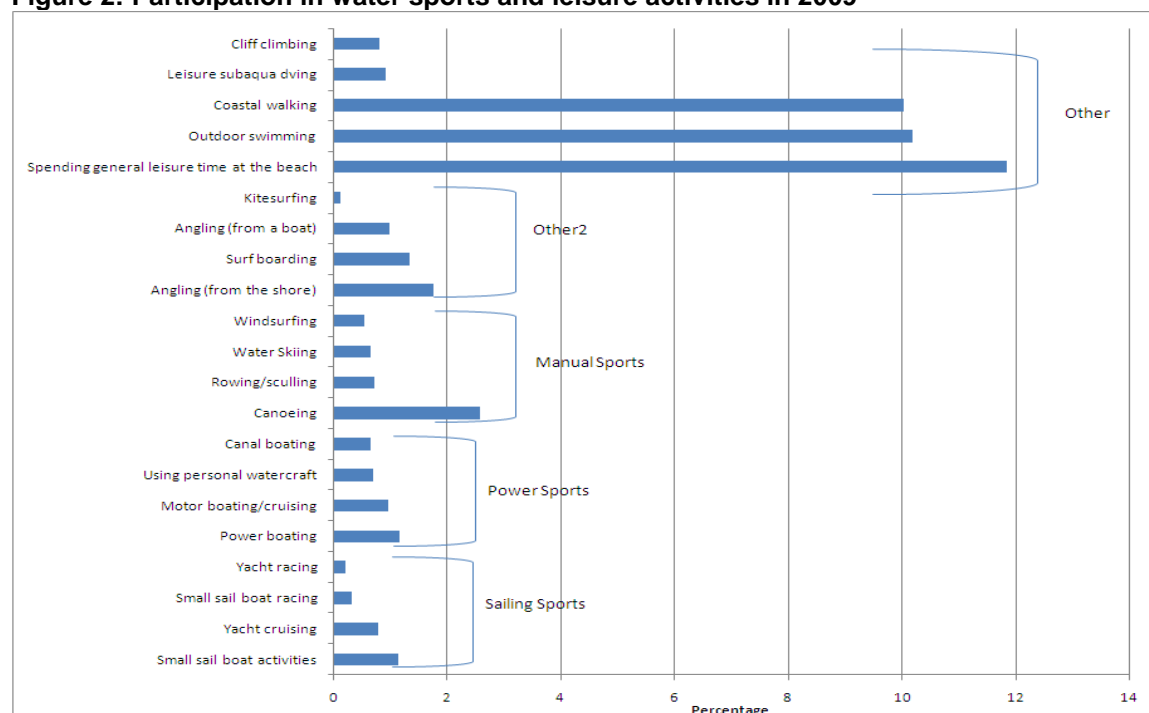
¹⁸ Water Sports and Leisure Participation Surveys 2009 & 2010, BMF, MCA, RNLI and RYA

National Trends, Opportunities and Constraints – Marine Tourism and Leisure

In 2009, 26.3% of the UK adult population (or 13.2m UK adults) had participated in one of the 21 watersports and water based leisure activities¹⁹. 7.2% participated in at least one of the 12 boating activities in 2009, decreasing to 5.6% in 2010²⁰.

Figure 1 shows that the areas of greatest participation were activities such as ‘spending time at the beach’, ‘outdoor swimming’ and ‘coastal walking’.

Figure 2: Participation in water sports and leisure activities in 2009



(Source: Watersports and Leisure Participation Report, 2009)

The report estimates that 2.5% of UK households own a boat or 1.1 million boats/craft owned by UK households and about 1 million are kept in the UK. 42% of these are motorboats, 36% are manual craft and 22% are sailing boats.

The 2010 survey shows a declining trend in participation in ‘any boating activity’ since 2002 reflecting 2 years of tough economic conditions affecting the tourism market, but also a consistent longer term decline in participation. An analysis by the 12 different sporting areas shows most sports are relatively stable or following the overall decline.

The report highlights a decline in casual participation, with occasional and enthusiast participation levels remaining stable – reflecting the economic conditions. However, the report also highlights that participation in the UK rather than abroad has also increased to record levels, with 80% participating in ‘any boating activity’ in the UK.

¹⁹ Watersports and Leisure Participation Survey 2009.

²⁰ Watersports and Leisure Participation Survey 2010

The Situation in Torbay – Marine Tourism and Leisure

	Marine Tourism and Leisure
Natural Resources	<p>Tor Bay harbour area has 16 square miles of open sea and 22 miles of coastline. Its sheltered position from prevailing winds makes it a safe area to participate in most water sports. Water sports enthusiasts enjoy immediate access to open water and minimal tidal disturbance.</p> <p>Torbay is widely perceived by stakeholders to be one of the finest coastal water sports locations in the UK. Its natural amphitheatre also provides an ideal environment for watching water sports events. It's clear waters, richness of biodiversity (as identified through numerous environmental designations) and geopark status also provides an ideal environment for snorkelling and diving.</p>
Participation	<p>Torbay has a strong history of watersports activity with:</p> <ul style="list-style-type: none"> ▪ Four active sailing clubs (Torquay, Brixham, Paignton and Babbacombe) ▪ Over 50 Maritime events/year ▪ Perception of growth in water skiing and powerboat sports ▪ Perception of growth in Kite Surfing ▪ Anecdotal evidence that diving has declined in recent years with the sinking of the Scylla near Plymouth drawing divers away from Torbay
Strategic Context	<p>Tourism accounts for 35%²¹ of jobs within Torbay and as such is recognised as a priority sector within the <i>Economic Strategy</i>²². <i>Turning the Tide for Tourism</i>²³ is a strategy designed to rejuvenate the tourist offer and reduce the declining number of visitor nights in Torbay. It has three key objectives:</p> <ul style="list-style-type: none"> ▪ To reduce the decline in visitor numbers and spend ▪ To increase the value of tourism in the Torbay economy ▪ To reposition the English Riviera as a leading and inspirational UK destination. <p>Five key opportunities were identified for new product development:</p> <ul style="list-style-type: none"> ▪ Maritime leisure ▪ Agatha Christie Legacy ▪ Global geopark status ▪ Events, festivals and exhibitions ▪ Business tourism <p>The strategy development included consultation with maritime leisure businesses and the following actions were identified as priorities to enable growth:</p> <ul style="list-style-type: none"> ▪ Establish maritime leisure product development action group ▪ Develop Torbay Week as the English Riviera's flagship maritime event ▪ Develop compelling water based 'experiences' and packages ▪ Integrate promotion of maritime leisure activities into central destination marketing ▪ Improve water front food, drink and retail offering ▪ Introduce planning policies that proactively support operators to grow

²¹ Including accommodation and food services, retail and arts, entertainment and recreation services. Figures from the Business Register and Employment Survey (nomis), for 2010.

²² Torbay Economic Strategy 2010-2015 – Accepting the Challenge

²³ Turning the Tide for Tourism in Torbay – Strategy 2010 - 2015

	<ul style="list-style-type: none"> ▪ Provision of more visitor boat moorings ▪ Improve the necessary water activity infrastructure and complementary parking <p>The <i>Tor Bay Harbour and Maritime Strategy 2007-1017 'Catching the Wave'</i> highlights a range of future potential opportunities to increase maritime leisure opportunities including:</p> <ul style="list-style-type: none"> ▪ Raise the profile of Tor Bay and the English Riviera as a destination for events and water based activities ▪ Development of a community maritime leisure centre of excellence (such as the old Naval Air Station at Osprey Rd, Portland) ▪ Improving the surrounding infrastructure through re-development of harbourside areas such as Victoria Parade in Torquay, The Lanes in Brixham and South Quay, Paignton Harbour. The water space of the 3 enclosed harbours also has the potential for further leisure offering, such as floating restaurants, vessels of special interest and further pontoon berthing ▪ Increase land based activities to support maritime events ▪ Increase offer for recreational boating as part of the overall destination marketing of the English Riviera ▪ Increase visiting yachts and other vessels and improve the welcome including comprehensive harbour guide, promotions and improving shore based facilities (e.g. showers, toilets and laundry facilities) and increasing pontoon berthing and access to pontoons. ▪ Consider the prospects for recreational diving – including placement of man-made wrecks and or artificial reefs. <p>The <i>English Riviera Geo-park Management Plan</i> also highlights opportunities to attract visitors and provide an enhanced visitor experience along Torbay's geo-park coast, through both walking and water based activities.</p> <p>The <i>Torquay Harbour Area Action Plan</i> highlights the importance of watersports and highlights a number of potential development opportunities to improve the tourism offer in Torquay including additional pontoon berths in the inner harbour.</p> <p>The Torbay Sports Facilities Strategy, in its section of sailing, highlights:</p> <ul style="list-style-type: none"> ▪ That the location of Torquay and Paignton sailing clubs houses restricts access; ▪ The need for additional boat parking ▪ The approach to boat parking charges (by the council) having a detrimental effect on participation ▪ Limited capacity for boat storage is also limiting the ability of sailing clubs to host major events. ▪ The implications of any re-development of Paignton Harbour on Paignton Sailing Club and Paignton Amateur Rowing Club.
Businesses	<p>Estimating the number of businesses operating within this sector is particularly difficult, as the sector is very diverse, often includes micro-businesses and overlaps with other sub-sectors (e.g. marine engineering).</p>

	A search of the Experian business prospector database found 43 companies operating in this sector in Torbay.
Facilities and Infrastructure	<ul style="list-style-type: none"> ▪ Leisure Mooring Facilities – Torquay (850), Brixham (800) and Paignton (250) - due to the recession, demand is currently high at lower priced end of the market, with some availability for more expensive berthing facilities. Demand is expected to rise again when the recession ends. ▪ Harbour launching facilities in the three harbours ▪ Exceptional beaches (most Blue Flag and Coastal Award beaches in England 2011)
Skills Provision	<p>South Devon College offers a number of courses in this area through its Marine Academy at Noss Marina on the River Dart. The academy provides a centre of excellence for water based outdoor activity and training. Relevant courses are listed below.</p> <p>Yachting</p> <ul style="list-style-type: none"> ▪ Cruising Instructor Training Course ▪ FdSc YACHT OPERATIONS <p>Adventure Sports and Outdoor Education</p> <ul style="list-style-type: none"> ▪ Adventure Sports BTEC Qualification Level 3 ▪ Adventure Sports Diploma Level 3 ▪ Adventure Sports Extended Cert Level 1 ▪ Adventure Sports Extended Cert Level 2 ▪ Adventure Sports Level 1 ▪ Adventure Sports Level 2 ▪ Competent Crew ▪ FdSc OUTDOOR EDUCATION ▪ RYA Coastal Skipper ▪ RYA Day Skipper Practical ▪ RYA Day Skipper Theory - Short course ▪ RYA Powerboat Level 2 ▪ RYA Start Yacht Racing Practical ▪ RYA Start Yachting Practical
Planned Projects	<ul style="list-style-type: none"> ▪ Re-development of Broadsands to create Watersports Centre of Excellence ▪ Creation of a Northern Arm Breakwater for Brixham providing a sheltered harbour and additional marina style facilities ▪ Pontoon moorings for Torquay’s Inner Harbour ▪ A local registered charity ‘Wreck the world’ is currently bidding to buy the Ark Royal from the MOD to sink in Torbay to use as an artificial diving reef ▪ Re-development at Goodrington currently out to tender
Issues and Constraints	<p>Government planning and guidance states that coastal sites should be safeguarded for activities that require a coastal location²⁴.</p> <p>Environmental designations, as well as providing opportunities, may also restrict certain types of development and activity.</p>

²⁴ Planning Guide for Boating Facilities – British Marine Federation and RYA

The Turning the Tide for Tourism strategy development included a consultation with maritime leisure operators, businesses and stakeholders and a SWOT was produced. To avoid further burdening these businesses, the Tourism Strategy SWOT has been used as the foundation for this SWOT (in italics), with additional points added where necessary (non-italics).

Table 9: Marine Tourism and Leisure SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ <i>Clear waters, good depths, gentle currents, protected from winds</i> ▪ <i>Very little commercial traffic</i> ▪ <i>Excellent race officers</i> ▪ <i>Not too far from major conurbations (closer than Cornwall)</i> ▪ <i>Accessible beaches for launching, with nearby vehicular access</i> ▪ <i>Two deep water harbours</i> ▪ <i>Two marinas and visitor berthing</i> ▪ <i>Multi-access dinghy launching facilities</i> ▪ <i>Torquay/Brixham facilities, shops/eating</i> ▪ <i>Well founded enthusiastic clubs</i> ▪ <i>Passionate private sector operators, keen to develop water sports</i> ▪ <i>Generally good co-operation between harbour authorities, clubs and operators.</i> ▪ <i>Good skills provision (Noss)</i> ▪ <i>Mainstream tourism provision (accommodation, restaurants & shops)</i> ▪ <i>500,000 visitors to website</i> ▪ <i>Geopark Status</i> ▪ <i>Torquay Waterfront Regeneration</i> 	<ul style="list-style-type: none"> ▪ <i>Poor linkage between maritime operators and traditional tourism sector</i> ▪ <i>Parking & launching infrastructure often unresponsive</i> ▪ <i>Car park height limiters make access difficult, attendants perceived as unfriendly and difficult</i> ▪ <i>Accommodation providers rarely get involved with water promotions</i> ▪ <i>Torquay dock over-subscribed/Brixham marina full</i> ▪ <i>Lack of quality food/drink harbour side</i> ▪ <i>Few operators currently operating</i> ▪ <i>Perception of transport in and out of bay</i> ▪ <i>Need for improved slipway in Brixham</i> ▪ <i>Need for more re-fuelling facilities</i> ▪ <i>Watersport participation stagnant nationally</i> ▪ <i>Domination of mainstream tourism market in Torbay by C1, C2, D families, over 60's and coach parties</i> ▪ <i>Quality of retail offering in Torquay</i> ▪ <i>No boatyard for repairs</i> ▪ <i>Lack of facilities for winter hauling out/storage</i> ▪ <i>Lack of large area that support major ground base required by national sailing events and festivals</i>
Opportunities	Threats
<ul style="list-style-type: none"> ▪ <i>Integration of water activities into brand and centralisation of marketing activity</i> ▪ <i>Build on Torbay Week to create major national event/enhance perception as quality watersports venue</i> ▪ <i>Develop themed weeks for other water activities</i> ▪ <i>Develop youth facilities as a priority. Families will stay in area.</i> ▪ <i>Embrace parking/access requirements of watersports enthusiasts/operators</i> ▪ <i>Promotional links between water activity/accommodation providers</i> ▪ <i>Creation of high volume watersport centre in Paignton, Broad Sands and Goodrington as possibilities.</i> 	<p><i>Inertia. The single greatest threat is to do nothing and see Torbay's water activity sector decline and the dependant industry lose a key USP.</i></p> <p><i>Further loss of facilities, to the detriment of local people and business. Unless the existing facilities are better supported with a supportive planning, transport and economic regime they are likely to decline or move to more supportive locations.</i></p> <ul style="list-style-type: none"> ▪ <i>Perception of car parking issues for event competitors</i> ▪ <i>Attracting events becoming more costly and competitive</i> ▪ <i>Competition from other 'water sports friendly' destinations</i>

<ul style="list-style-type: none"> ▪ <i>Fast ferry link between Torquay and Brixham</i> ▪ Geopark Status ▪ Ark Royal Artificial Reef ▪ Increase marina capacity ▪ Growth in Gig Rowing in wider region ▪ Embrace marine based eco-tourism (snorkelling, diving, glass bottom boats/ kayaks) ▪ Third Harbour in Torquay 	<ul style="list-style-type: none"> ▪ Shore-side facilities perceived to be not water sports friendly (e.g. toilets, car parking, showers etc.) ▪ Facilities not able to meet demands of major sailing events and festival requirements ▪ Competitions for sites/land for other forms of land use
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Conclusion – Marine Tourism and Leisure

Torbay is widely perceived by stakeholders to be one of the finest coastal water sports locations in the UK. Its natural amphitheatre also provides an ideal environment for watching water sports events. Its clear waters, richness of biodiversity (as identified through numerous environmental designations) and geopark status also provides an ideal environment for snorkelling and diving.

There are a number of exciting potential initiatives such as plans to sink a ship off the Bay for diving and development of a watersports centre of excellence. There is an established marine tourism and leisure business base, as well as excellent skills and training provision through South Devon College, as well as other providers.

However, in order to compete with other destinations in the South West and further afield, improvements are needed in terms of:

- Waterside facilities and infrastructure
- Marketing and product development and promotion

This is an exciting emerging sector where with the right co-ordination and infrastructure has the potential to make a significant contribution to the objectives of the tourism and economic strategies through increasing year round tourism and visitor spending.

Renewable Energy

Description of Renewable Energy

The UK has among the highest levels of exploitable renewable energy resources in the world and has the potential to become a global leader in both engineering development and energy production. Marine renewable energy sources include wind, wave, tidal stream and tidal range.

The principal economic activity is the extraction of energy from the sea and its environs for electricity. Ancillary supporting activities include the construction and decommissioning of fixed structures such as platforms to support wind turbines and installation of associated shore cables. Secondary activities include the transmission of electricity to the distribution system.

Table 10: Business Classification Codes – Marine Renewable Energy

SIC 2007	Thompson Classifications	Yell Classifications
35.1 Electric power generation, transmission and distribution	Electricity Generating & Distributing Equipment Electricity Companies Renewable Energy Windmills & Wind Power Equipment	Electricity Generating Eqpt Electricity Suppliers Wind Turbines & Windmills

National Trends, Opportunities and Constraints

The marine renewable energy sector has grown significantly in the last decade and is forecast to continue growing rapidly. This rapid growth has been aided by government support for energy generation from renewable sources, involving financial investment and planning and policy initiatives that help to encourage private investment. Particularly important drivers are government targets to increase the proportion of renewable energy being produced to 15% by 2020.

There are three main commercially viable technologies at present wind, wave and tidal, although in the future it might be possible to harvest marine algae in the form of biomass energy. The most advanced of these is wind power, where there is already significant commercial deployment (in 2009, there were 10 offshore wind farms, with an installed capacity of 0.7GW. A further 1.7GW was under construction, 2.9GW had been consented and around 9.9GW was in planning and pre-planning).

The Crown Estate is the landowner of the seabed and areas of foreshore. In order to manage marine renewable development, the crown estate announced a round of competitive processes for Offshore Wind Farm lease options. The first being in 2001, the most recent (Round 3) identified 9 separate wind farm zones (33GW capacity). The development partners for these were announced in 2010 and construction is expected to commence in the next couple of years.

Wave and tidal power are at an earlier stage in development, with fewer devices in the water. Those in existence tend to be for demonstration purposes, with facilities in Orkney, the North East and more recently Hayle, Cornwall. Wave resource maps show the greatest potential in

the North Sea and to the West of Cornwall, where average wave heights are more significant. Tidal power requires specific tidal range/estuary opportunities and is being assessed in a number of estuaries (such as the Severn, Liverpool, Solway Firth) around the UK. In the longer term it is estimated that wave and tidal power technologies could contribute up to 30GW by 2050. Key issues for offshore renewable development include:

- Cost – The technologies are proving more expensive than anticipated;
- Planning – securing planning consent can take a long time;
- Connecting projects to the transmission and distribution network;
- Concerns over environmental impact in terms of noise and bird life;
- Skills and Supply chain;and
- Infrastructure – lack of suitable ports

In January 2012, the South West was named as the UK’s first **Marine Energy Park**, extending from Bristol to Cornwall. This builds on £100m invested over the last seven years to provide world leading research and demonstration facilities including: Wave Hub, the largest consented demonstration area for marine energy in the world; the FaB Test nursery site in Falmouth Bay; and world class Hydrodynamic test facility in the new Marine Sciences building which will open later this year at Plymouth University. The PRIMaRE programme has also funded specialist research facilities such as the South West Mooring Test Facility (SWMTF) and Dynamic Marine Component Test facility (DMAC) at the University of Exeter.

The core objective of the South West Marine Energy Park is to create a positive business environment that will foster business collaboration, attract investment and accelerate the commercial development of the marine sector. To do this, it will develop a programme of actions to:

- Enable access to marine energy resources and de-risk project investment;
- Provide world class facilities for technology development;
- Prioritise support for enterprise and innovation;
- Invest in port, grid and manufacturing infrastructure; and
- Build a collaborative supply chain and skills base.

The Situation in Torbay – Renewable Energy

	Renewable Energy
Natural Resources	Tor Bay’s natural features do not provide ideal conditions for marine renewable deployment at the current time. Its sheltered, limited tidal nature means that there is limited energy generation potential – compared to other more exposed areas.
Strategic Context	Tor Bay’s economic strategy recognises the importance of the green economy in ensuring improved resource efficiency and lower costs for businesses.
Businesses	A search of the RegenSW marine energy supply chain directory found 79 companies in Devon. One (a PR company) was based in Torbay. However, the sector is closely linked to marine engineering and advanced manufacturing industries where Torbay has a more significant presence. There are a number of plastics, injection moulding, electronics and engineering companies who would have the capability to support this sector.

Facilities and Infrastructure	Established harbour infrastructure in Torquay and Brixham in particular and sheltered deep water anchorage for ship repairs and inspections. Torbay's harbours are supported with stevedore and ship agent's services and offer easy access to the road network (especially when the South Devon Link Road is complete). Further investment in the harbour infrastructure and marine engineering facilities could put Torbay in a strong position to support the marine energy park.
Skills Provision	South Devon College has courses in Building Services and Renewables and is building a new Energy Centre as well as excellent marine engineering provision (described previously).
Planned Projects	None identified
Issues and Constraints	

Table 11: Renewable Energy SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Advanced manufacturing & marine engineering sectors ▪ Sheltered bay – ideal for loading/unloading support vessels 	<ul style="list-style-type: none"> ▪ Sheltered bay (lower wind speeds, wave heights) ▪ Low rate of tidal stream ▪ Nearest offshore wind development Isle of Wight and Atlantic Array ▪ Little/no presence in the marine energy supply chain
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Unknown future technologies ▪ Providing support services to the Marine Energy Park ▪ Opportunities for Heart of SW businesses to become involved in the nuclear supply chain for Hinkley 	<ul style="list-style-type: none"> ▪ Other ports in the South West with better infrastructure and facilities to support the marine energy park.

Conclusion - Renewable Energy

The opportunity in relation to marine renewable energy is limited for Torbay – Torbay does not have a marine renewable business base at this current time. However, it does have strengths in the advanced manufacturing and marine engineering sectors which could be directed towards opportunities associated with the newly designated Marine Energy Park and the supply chains that might be developed. It is recommended that TDA continue to engage with the Marine Energy Park partners to further understand and respond to opportunities and work with the area's advanced manufacturing sector to identify opportunities for these businesses.

Torbay's port infrastructure includes deep water harbours in Torquay and Brixham, which with investment in the necessary infrastructure, could provide an opportunity to support the Marine Energy Park. The infrastructure and facilities necessary (and any potential economic benefit) to support this sector should be explored further in the development of a Port Masterplan.

Short Sea Shipping, Cruise ships and Ferries

Description of the sub-sector

Short sea shipping means the movement of cargo and passengers by sea between ports situated in geographical Europe or between those ports situated in non-European countries having a coastline on the enclosed seas bordering Europe. Short sea shipping is generally considered to be smaller scale in nature than inter-continental shipping and does not necessarily involve the provision of roll-on roll off ferries.

The principal economic activities are maritime transport of passengers and freight. Ancillary activities include:

- Shipbuilding;
- Construction of ports and marinas,
- Navigation, pilotage and berthing,
- Capital and maintenance dredging of harbours and navigation channels; and
- Storage of freight

Table 12: Business Classification Codes – Shipping, Cruise ships and Ferries

SIC 2007	Thompson Classifications	Yell Classifications
50.1 Sea and coastal passenger water transport	Ferries	Shipping & Forwarding Agents
50.2 Sea and coastal freight water transport	Shipping Companies	Shipping and Marine Shipping Companies and Agents
42.92 Construction of water projects	Boat trips and hire	Boat hire
52.27 Service activities incidental to water transportation	Cruise	Cruise
52.21 Cargo handling		

National Trends, Opportunities and Constraints – Short Sea Shipping, Cruise Ships and Ferries

In 2010, ports in England and Wales handled 410 million tonnes of goods, 95% of the total volume of UK trade and 75% of its value²⁵. For an island economy, there are limited alternatives available to the use of sea transport for the movement of freight and bulk commodities. As a consequence, shipping will continue to provide the only effective way to move the vast majority of freight in and out of the UK, and the provision of sufficient sea port capacity will remain an essential element in ensuring sustainable growth. The Government believes that there is a compelling need for substantial additional port capacity over the 20-30 years, to be met by a combination of development already consented and developments for which applications have yet to be received.

Oxford Economics estimate that in 2009 the UK shipping industry:

- Employed 112,000 people directly and supports a further 225,000 (148,000 via the supply chain and 77,000 via induced spending of employees); and
- Contributed £6.9billion GVA

²⁵ National Policy Statement for Ports, Department of Transport, October 2011

The report describes how the sector was growing steadily between 2003 and 2009, but declined between 2008 and 2009, largely as a result of the decline in freight traffic due to the recession.

In terms of policy, the European Commission has an active policy to promote Short Sea Shipping. This form of transport mode is highly efficient in terms of environmental performance and energy efficiency. It has the potential to solve road congestion problems affecting many parts of the European continent. All the studies point out the necessity of encouraging short sea shipping to meet the goal of the European sustainable transport policy.

Growth in the European **cruise sector** has been exceptional in recent years and the UK has been one of the main beneficiaries. Visit Britain reported in 2008²⁶, that growth in both turn round port and port of call passengers has increased markedly as Figure 3 below shows. The higher balance in favour of turn around passengers reflects the large numbers of passengers who start a cruise to destinations such as the Baltic and the Mediterranean in a UK port in comparison with the numbers stopping off at UK ports ‘mid cruise’.

Figure 3: Cruise passengers at UK ports

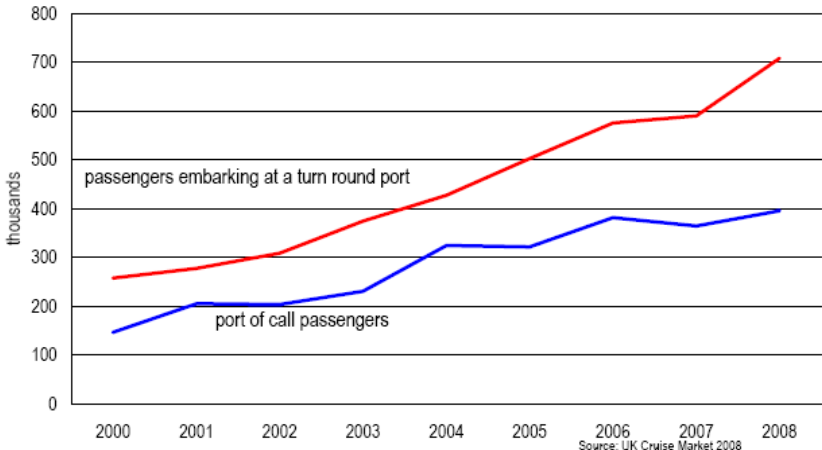
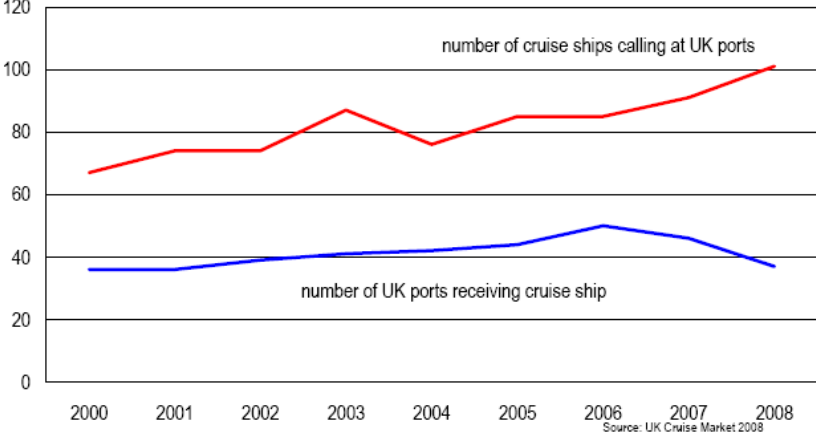


Figure 4 shows that despite this trend in passenger numbers, the number of UK ships calling at UK ports is not increasing at the same rate, reflecting a move towards larger ships.

Figure 4: Numbers of ports and ships



²⁶ Foresight report March 2010. Visit Britain.

The report concludes that whilst growth prospects are strong, port authorities must ensure sufficient investment in the construction of berths capable of handling the latest vessels, as well as investing in ancillary port facilities. It is not just ports that need to be top-notch in order to attract increased numbers of cruise ships and their passengers; local infrastructure must enable the efficient movement of passengers embarking and disembarking at ‘turn around’ ports, along with transportation of the provisions needed to service both the upkeep of the ship. Similarly, it is necessary for local businesses and authorities to work with cruise lines to ensure that shore excursions are successful, both in terms of operational efficiency and customer satisfaction.

The Situation in Torbay

Note: Due to on-going project development work by the Torbay Development Agency in relation to the development of a third harbour in Torbay, it has not been possible to speak with cruise line operators directly to get their perspective of Torbay’s potential in relation to the cruise ship sector.

Short Sea Shipping, Cruise Ships and Ferries	
Natural Resources	Tor Bay’s sheltered aspect provides a useful staging post for ships travelling up the English Channel.
Strategic Context	<p>The <i>Torbay Harbour and Maritime Strategy</i> states that opportunities to maximise water based transport between the 3 towns should be assessed as part of an integrated transport strategy.</p> <p>The Local Transport Plan²⁷ identified the need for infrastructure for a frequent ferry between Torquay and Brixham and other destinations further afield, which would reduce congestion on the coast road and allow more rapid access between the two towns – serving both visitors and residents.</p>
Businesses	<p>Torbay has a long established passenger pleasure craft industry, mainly transporting visitors on local trips, connecting the 3 towns and linking to neighbouring destinations. There are a number of local ferry and excursion businesses operating in the Bay providing marine transport links, excursions, ferry services, fishing trips, wildlife watching as well as boat hire.</p> <p>Marine Towage Services (MTS) has been operating in Brixham since 1920 and primarily provides support services to ships anchored or passing through or by Tor Bay. This includes supporting the ships with any new provisions, equipment, changing/supporting the crew, piloting services, using divers to survey hulls and salvage operations.</p>
Facilities and Infrastructure	<p>The three ports within Tor Bay Harbour are principally used for fishing and marine leisure activities and are not equipped to handle significant volumes of cargo or freight.</p> <p>Torbay currently attracts a number of visiting cruise ships each year which anchor in the Bay and transport passengers ashore to visit local attractions. Torbay Council is working to attract more cruise ships to the Bay.</p>
Skills Provision	No skills or training courses identified.
Planned Projects	<p>A fast ferry service was trialled by Stagecoach in 2008, reportedly carrying 250,000 passengers in the trial. Torbay Council has just submitted a bid to the Department of Transport for Local Sustainable Transport funding.</p> <p>The feasibility of a third harbour for Torquay is currently being investigated as a means to enable cruise ships to dock and allow more passengers ashore, as well</p>

²⁷ Local Transport Plan for Devon and Torbay – 2011-2026

	as provide other facilities.
Issues and Constraints	Lack of land for cargo handling and storage Poor onward road and rail connections

Table 13: Short Sea Shipping, Cruise Ships and Ferries - SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong pleasure boat/cruises market ▪ Strong ship agent service 	<ul style="list-style-type: none"> ▪ Lack of facilities or infrastructure for handling cargo or freight. ▪ Poor onward road and rail transport links
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Establish fast ferry service between Torbay's towns and beyond ▪ Re-establish continental ferry services ▪ The long term need to protect Paignton from rising sea level and coastal erosion may present an opportunity, in the future to create harbour facilities able to cope with cargo and freight, close to the rail network. 	<ul style="list-style-type: none"> ▪ Better equipped ports at Plymouth and Teignmouth for short sea shipping

Conclusion – Short Sea Shipping, Cruise Ships and Ferries

Despite Torbay's limited cargo and port facilities, the Bay is an important staging post for ships travelling up the English channel, its sheltered conditions means that ships often call into the Bay to await further instructions or take on provisions. Supporting are businesses such as Marine and Towing Services, who provide ships with provisions, crew, charts and arrange servicing works if necessary. The nature of this work means that it has an important multiplier effect on the Torbay economy. The long term need to protect Paignton from rising sea levels may present an opportunity to examine the role of Paignton Harbour and its potential for use in relation to cargo handling, given its proximity to the rail network.

Torbay has also established a strong pleasure boat/cruises market, with several operators providing fishing trips, wildlife watching and other boat excursions. It will be important to ensure that any fast ferry services proposed do not displace activity from these established businesses.

Torbay currently attracts a number of visiting cruise ships each year which anchor in Tor Bay and transport passengers ashore to visit local attractions. Torbay Council is working to attract more cruise ships to the Bay. A third harbour for Torquay would provide the facilities required to attract more or larger cruise ships as well as provide other facilities in relation to marine leisure.

Detailed Action Plan

The tables below set out the key actions required to meet the strategic objectives outlined for the marine economy in Torbay. These have been set out under sub-sector themes under the three themes developed under the economic development strategy:

- Stimulating and Attracting Investment;
- Improving Business Performance; and
- Raising Skills and Improving Opportunities

Key

Partners:

TC = Torbay Council
TDA = Torbay Development Agency
THM = Tor Bay Harbour Master
EH = English Heritage?,
PSC = Paignton Sailing Club,
TCCT = Torbay Coast and Countryside Trust
LEP = Local Enterprise Partnership
TDA = Torbay Development Agency
ERTC = English Riviera Tourism Company
SDC = South Devon College
BBDS = ?
TBHC = Tor Bay Harbour Committee
MMO = Marine Management Organisation
MDL = Marina Development Limited

Timing:

Short Term = An 'early win' achievable within one year
Medium Term = Achievable in up to five years
Long Term = Achievable in 5+ years

Stimulating and Attracting Investment

Capitalising on recent and planned Investment

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Provide the right infrastructure and facilities to attract cruise ships to Torbay and ensure value is captured locally.	<p>Attracting cruise ships to Torbay could provide a significant opportunity to change the visitor profile of Torbay and increase average visitor spending in the local economy. To achieve this will require:</p> <ul style="list-style-type: none"> Investment in port infrastructure and facilities such as a new pier or harbour Investment in the attractions and retail offer to ensure value is captured locally. 	Feasibility reports	Long	Torbay Council , TBHC	TDA, THM TBHC, LEP	High	Marine Tourism, Shipping, cruise ships and ferries.
Create centre of excellence for water sports or water sports/maritime centre	<p>Existing watersports facilities have limitations – especially for hosting events. Creation of a watersports centre at Broadsands or Goodrington would allow for:</p> <ul style="list-style-type: none"> Hosting more and larger maritime events Ease congestion/parking in Torquay/Brixham on event days Provide facilities for a greater range of watersports Provide a watersports friendly infrastructure for visitors and residents alike (e.g. showers, storage, hire facilities, training) Provide opportunities for the establishment of watersports related businesses The re-development of a tired waterfront location 	Feasibility report	Medium	TDA	SDC, EH, PSC, TCCT TBHC	High	Marine Tourism
Create Northern Arm breakwater in Brixham	The construction of a Northern Arm Breakwater in Brixham would enclose the open water area of the outer harbour to provide calmer wave conditions and safer harbour in all weather conditions, allowing better use by existing users and development of further leisure use (including additional marina facilities)	Identify funding sources	Long	TDA, TBHC	Marina Developments Limited	High	Marine Tourism; Marine Engineering

<p>Develop fish processing park to capitalise on recent investment in the fish market. Including:</p> <ul style="list-style-type: none"> ▪ Identification of site for fish processing ▪ Test feasibility of 1) cold storage facilities; 2) High pressure pasteurisation plant²⁸ ▪ Encourage start-ups and inward investment. 	<p>Fish processors are currently located in various locations around Torbay, Bringing processors together could provide the critical mass for investment in other facilities such as cold storage and high pressure pasteurisation plant and alternative waste management options. These investments could significantly improve the competitiveness of Torbay's fish processors, who are currently using cold storage facilities in Grimsby.</p>	<p>Feasibility Study</p>	<p>Medium</p>	<p>TDA</p>	<p>TC, private sector</p>	<p>High</p>	<p>Fish</p>
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²⁸ High pressure pasteurisation plants are used extensively in the US to extend the life of food products, preserve meats and fish and remove bacteria from products. They are not currently used extensively in the UK. They are estimated to cost approximately £1.5m and could potentially provide a new form of food processing in the SW. Stakeholders have suggested that this facility (as well as others such as cold storage) could be set up as part of a co-operative and be run on a self sustaining basis as food producers in the SW pay to use the facility.

Cross sector development and collaboration for added value

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Development of a port master plan which draws together maritime and coastal activity and planning to ensure an integrated coastal zone.	There are many competing demands for land use and water use in Torbay. A port masterplan would provide an opportunity to plan development to maximise the economic opportunity for the marine sector.	Plan produced	Short	THM, TBHC	TDA TCCT South Hams Council, Teignbridge, Sea Torbay	High	Cross Sector
Develop a fishing heritage attraction (maybe linking history, life at sea, food, art, culture)	Stakeholders report that visitors to Brixham have a high level of interest in the fishing industry and history of it in Brixham. At the current time, there are few attractions or opportunities for them to pursue this.	Feasibility	Short/Medium	TC	Private/ Third sector, ERTC	High	Fish and Marine Tourism
Improve infrastructure to allow fast ferry services	A fast ferry service could be used by both residents and visitors to travel quickly between Torquay and Brixham. This could have the following economic benefits: <ul style="list-style-type: none"> • Increase access jobs and opportunities • Encourage visitors to visit Brixham/Torquay • Encourage trade between the two towns <p>However it is important that potential for displacement is assessed. Could be complementary to third harbour aspirations.</p>	Infrastructure improved	Short	TC TBHC	THM	High	Short sea Shipping and Ferries Marine Leisure

Addressing specific sub-sectoral needs and opportunities

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Sink a ship as a diving destination	A local charity are working on a project to sink a royal navy ship off Tor Bay to create a diving attraction. This would help to attract divers to Torbay and increase visitor spend all year round.	Sink Ship	Medium	Wreck the World	TBC MMO THM	High	Marine Tourism
Research and understand demand for boat yard facilities.	This project has revealed that Tor Bay has a shortage of facilities to work on boats out of the water, limiting the marine engineering sector. Stakeholders identified that this is an issue affecting the fishing, leisure and heritage boat sectors. This need could be addressed by a range of different solutions. Demand for facilities and appropriate solutions needs to be tested further.	1) Land made available for temporary boatyard, 2) Feasibility report	Short	THM, South Devon Marine	SDC	Medium	Marine Engineering
Encourage scientific research (and data collection) of Torbay's marine environment/fisheries	This action is unlikely to create direct economic benefits, but in the long term will help to develop Torbay's profile and capacity in relation to marine science and also provide evidence to support the marine planning process.	Development of marine research plans	Short	SDC	TCCT, Local universities	High	Marine Science, Fish
Protect existing marine engineering facilities close to the water from re-development in non-marine uses	Some economic activities require facilities close to the water in order to be able to operate effectively. This is especially important for sectors such as marine engineering, fishing and marine leisure and tourism. If these sectors are to be viable and grow and expand – it is important that marine land uses are protected.	Council planning policy amended	Long	TC as planning authority	TBHC	High	Marine Engineering
Develop a programme of beach/shore line site upgrades (consistent with core strategy and a portmasterplan) to improve access to the water for watersports, provision of parking, facilities (e.g. boat storage, equipment hire, showers) and offerings (e.g. cafes, retail outlets etc).	There is a perception that current beach/shoreline sites could be improved to provide a more watersports friendly environment, enabling Torbay to compete with other watersports destinations to attract visitors and events.	Develop improvement plan	Medium	TC	TDA, TCCT, ERTC TBHC	High	Marine Tourism
Develop activity sports (such as rock climbing, coast steering and kyaking) at	Improve and broaden the watersports product offering.	Feasibility Study	Medium	TCCT	ERTC, SDC, private	Low	Marine Tourism

Berry Head quarry					sector		
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Improving Business Performance
Capitalising on Recent and Planned Activity

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Establish one group to bring together maritime leisure stakeholders and businesses to represent the needs of the sector and develop maritime leisure products	The purpose of this group would be to: <ul style="list-style-type: none"> • Represent the needs of the sector • Develop the maritime leisure product • Improve co-ordination of maritime events 	Group formed	Short term	ERTC	TDA, private sector	High	Marine Tourism
Develop brand and marketing of the fish sub-sector by: <ul style="list-style-type: none"> ▪ Develop brand for home and international market ▪ Promote local sustainably caught fish (local campaign, accreditation, marketing materials, fish market tours) ▪ Encourage more local fishmongers/stalls selling local fish in Torbay 	Increase fish and fish product sales both locally and internationally.	Brand and marketing plan produced	Short	TDA	Private sector	High	Fish
Research additional uses for waste from fish processing or fish meal plant.	Torbay's fish producers currently pay to transport their fish waste to Grimsby for processing adding additional overheads and reducing their competitiveness	Feasibility report	Short/Medium	TC – Waste Management	Local Universities	High	Fish

Cross sector development and collaboration for added value

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Create new or utilise better existing business forums to bring maritime businesses together across different sub-sectors to find creative solutions.	Bringing together people from different areas of the marine sector provides opportunities for the cross fertilisation of ideas and the development of creative solutions. Businesses attending the prioritisation workshop appreciated the opportunity to work with people from outside their immediate sector.	Group formed or existing group adapted.	Short	TDA	All stakeholders Private sector	High	All
Provide business advice and facilitate access to finance, include business to business funding.	Linking to actions in the economic development strategy, there is a clear need for businesses to be provided with clear business advice, as well as access to finance. In particular, businesses were interested in how they could be supported in accessing business to business finance.	?	Medium	TDA	Business advice organisations, banks	High	All
Create tourism products that link fishing and eating/cooking opportunities e.g. <ul style="list-style-type: none"> ▪ Fishing heritage/culture ▪ Fishing market tours ▪ Fishing trips ▪ Cookery schools ▪ Fine dining experiences ▪ Stronger links with local restaurants 	Capitalising on Torbay's strengths in terms of fishing and tourism to create new niche opportunities to add value	Products developed	Short-Medium term	ERTC, TDA, Seafish	Taste of the West, Devon and Dorset fish accommodation providers restaurants		Fish and Marine Tourism
Establish off season maritime events (e.g. seafood/maritime culture/maritime arts events/festivals) including events such as trawler race and fish stock.	There is a need to increase the number of visitors coming to Torbay in the shoulder and winter months. Sea food and maritime cultural events and activities may provide appropriate themes. Event management required.	Events planned	Medium	ERTC, TC	SDC	High	Marine Tourism Fish?
Create tourism products that link diving/fishing/boating and marine science (e.g. eco- holidays where	Capitalising on Torbay's existing natural assets to strengthen the marine leisure offer.	Products developed	Medium	ERTC/TD A/BBDS	Local clubs, private sector, SDC, TCCT,		Fish and Marine Tourism,

tourists helps to collect marine science data)					BBDS, wreck the world		Marine Science
Identify niche opportunities to explore marine science in relation to fisheries	Working with the MMO, IFCA and marine research institutions – identify research opportunities in order to build Torbay’s profile and reputation in relation to marine science.	Liaison with	Short	Sea Torbay	Natural England, South Devon College IFCA, MMO	Low	Marine Science and Fish
Encourage and support fishing and leisure angling			Short/Med			High	Marine Tourism Fish?

Addressing specific sub-sectoral needs and opportunities

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Develop Torbay Week as the English Riviera's flagship maritime event	Activity planned in the Tourism Strategy	Torbay week delivered.	Short term	ERTC	TDA, THM, TBHC, Yacht clubs and other sports clubs	High	Marine Tourism
Develop compelling water based 'experiences' and packages	To further develop the marine tourism product – extending the season and increasing visitor spending.	Maritime packages developed	Medium	ERTC	Private sector, sports clubs	Medium	Marine Tourism
Develop promotional material for maritime leisure and integrate into central destination marketing	Ensuring that the maritime leisure product in Torbay is promoted to potential customers around the world, within the context of wider Torbay marketing and promotion. Could include alternative method of reaching target audiences for instance promotion through satellite GPS navigation systems on boats.	Promotional material prepared	Short	ERTC	Private sector	Medium	Marine Tourism
Introduce community planning and licensing policies that proactively support operators to grow	Ensuring that council policy and procedures are business friendly for small businesses operating in the marine sector.	Policies and procedures reviewed	Medium	TC	ERTC	Low	Marine Tourism
Diversify range of equipment for hire and place to store kayaks	Broadening and developing the marine tourism product and ensuring that Torbay is marine water sports friendly.	1) Places to store identified 2) Barriers to wider range understood	Medium	THM	Private sector	High	Marine Tourism
Encouraging hi tech sector to explore opportunities within marine science	Torbay has a strong hi tech sector. Nationally there are good prospects for growth within the marine science sector (in terms of marine equipment and technology). Torbay's advanced manufacturing businesses could be alerted to this opportunity to diversify.	Information prepared for hi tech forum	Short	TDA	Association of Marine Science Industries	Low	Marine Science
Explore how South Devon Marine might be sustained.	Explore how marine businesses get access to support. Review geographic spread for group. Liaison with BMF	Feasibility report	Short	TC, TDA	South Devon local authorities	High	Marine Engineering

	and other groups such as maritime Plymouth						
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Raising Skills and Improving Opportunities Capitalising on Recent and Planned Activity

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Building on investment by South Devon College in developing marine based provision, develop a marine centre of excellence to support all sub-sectors (this would link with other key developments such as the planned centre of excellence for watersports).	South Devon College provides a good coverage in some marine sectors (such as watersports and marine engineering), but with less provision in other areas such as commercial fish/fish farming and fish processing.	Feasibility study	Medium	SDC	Employment and Skills Board	Medium	All

Cross sector development and collaboration for added value

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Encouraging an employer driven approach and partnership with funders and providers to:	Employer engagement is essential to ensure training provided meets needs and requirements of sector.						
<ul style="list-style-type: none"> Clarify needs and demands for employment and skills – now and in the future – through research/survey 	To get a clear understanding of demand	Research report	Short	ESB	Sector organisations, private sector, SFA	High	All
<ul style="list-style-type: none"> Encourage employers to engage with local training providers to ensure skills/training provision matches needs 	As well as influencing the direction of travel, engagement provides an opportunity for an on-going relationship which benefits the training provider, the business and students.	Employers engaged	Medium	SDC	Private sector, ESB	High	All
<ul style="list-style-type: none"> Promote sector attractiveness and employment pathways for young people and members of the local community (including those not in work) 	Attracting recruits to some sectors of the marine economy can be challenging (e.g. fish processing), resulting in recruitment and retention problems. Given the number of people unemployed within Torbay, this is a missed opportunity. This could be addressed through the formation of partnerships between businesses and organisations who aim to help people into employment to promote the sector and support people to enter the sector.	Employment pathways created	Short	ESB	Private sector, employment support organisations operating in Torbay	High	All (but in particular fish processing)
<ul style="list-style-type: none"> Promote and encourage workforce development including apprenticeships 	Workforce development has been shown to improve recruitment and retention as well as wider productivity.	Increase in the number of businesses participating in workforce development	Medium	SDC	ESB, Private sector	High	All

Addressing specific sub-sectoral needs and opportunities

Action	Rationale	Output	Timing (Short, Medium, Long term)	Lead Partner	Partners	Priority	Sub-sectors to benefit
Explore feasibility of a marine science field station, either as a standalone facility or incorporated into other developments	<p>A field study station could be used by Schools, South Devon College, and universities. It could provide a facility to support research into Tor Bay's unique natural assets (including the geopark). In the long term could:</p> <ul style="list-style-type: none"> • Build Tor Bay's reputation for marine science • Create intellectual capacity associated with marine science <p>It could be developed as a standalone facility or explored as part of a centre of excellence for watersports (thus linking facilities such as boats and diving equipment needed for marine fieldwork)</p>	Feasibility report	Medium	TDA/SDC	THM, TCCT	High	Marine Science
Support South Devon College establish marine biology courses	Provision of marine biology courses will be the first step in establishing educational capacity in relation to marine science.	Marine Biology courses established	Medium	SDC	TCCT, THM	Medium	Marine Science
Promote Geopark marine environs with PHD students by creating linkages to the Universities of Plymouth, Exeter and the UK's 6 marine science institutions.	Creating such linkages will help establish Torbay's profile as a centre for marine science.	PhD ships established researching TorBay's natural assets.	Medium	SDC	Higher education institutions	Medium	Marine Science
Increase skills and capacity of community volunteers.	The marine tourism sector is closely connected to community participation in watersports – for instance, the hosting of sailing competitions often requires significant numbers of volunteers to manage different elements of the event. Promoting the participation and training of volunteers is therefore important.	?	Medium	Torbay Sports Council	Sports clubs, Council for voluntary action	High	Marine Tourism
Encourage marine businesses to take on an apprentices	There is a strong marine engineering apprenticeship programme at South Devon college, but more employers are needed to provide apprenticeship opportunities for trainees.	More apprenticeship places	Short	National apprenticeship service	SDC, Apprentice providers, TDA, South Devon Marine	High	Marine Engineering

Appendix 1 – Approach and Stakeholders Consulted

The approach adopted examined six main sections of the marine economy:

- Commercial fishing activity including fish farming;
- Marine engineering
- Marine tourism and leisure;
- Marine science;
- Renewable energy provision; and
- Short Sea Shipping, Cruise Ships and Ferries.

For each section, a desk based review was undertaken to:

- Identify relevant research or sub-sectoral information at national, regional or local level to understand key trends, opportunities and barriers to growth;
- Identify known businesses operating in the sub-sector;
- Identify relevant skills provision in the Torbay area; and
- Identify relevant facilities and infrastructure.

The desk research was complemented by a consultation process with around 30 stakeholders and an action planning workshop with 25 partners. A full list of stakeholders and attendees at the event can be found in Table 14 below. A review of Torbay’s economic development and other relevant strategies was undertaken to help shape the aims, objectives and key principles guiding actions for the marine economy. This is contained in Appendix 2. Finally, a review of sources of potential funding sources was conducted. A summary of the main regional, national and international sources has been included in Appendix 3.

Table 14: Stakeholders Consulted and attending the workshop

Organisation	Consulted	Attending Prioritisation Workshop
Tor Bay Harbour Master	Kevin Mowat	Kevin Mowat
South Devon College	Adrian Bevin	Adrian Bevan Simon Elliot
Torbay Town Centres Company	Ian Broadfoot	
Torbay Business Forum	Alan Archer	Alan Archer
Torbay Development Agency	Iain Masters & Dave White	Alan Denby Karen Whibley Debbie Passmore Iain Masters
Devon Maritime Forum	Jim Masters	
Torbay Coast and Countryside Trust	Alex Schofield & Nigel Shillabeer	Alex Schofield & Nigel Shillabeer
Torbay Council (Strategic Planning)	Steve Turner	
Tor Bay Harbour Committee		Vic Ellery
Commercial Fishing Activity including Fish Farming		
Brixham Trawler Agents	Rick Smith	
Torbay Council Environmental Health	Lars Barker	Lars Barker
Blue Sea Food	Trevor Bartlett	Trevor Bartlett
Sea Food Kitchen	Nigel Bloxham	Nigel Bloxham
Marine Tourism and Leisure		
Marina Developments Ltd	Mike Smith	

English Riviera Tourism Company	Carolyn Custerson	
Torbay Sports Council	Roger Mann	Roger Mann
Royal Torbay Yacht Club	Mike Ellis	Tim Whitehead Bill Butcher
Brixham Yacht Club	Adrian Morrall	
Babbacombe Corinthians Yacht Club	Peter Haywood	
International Sailing School	Marshall Ritchie	
Royal Navy	Cmdr Tom Herman	
Wreck the World		James Doddrell & Michael Byfield
Marine Engineering		
British Marine Federation	Paul Singer	Alice Driscoll
South Devon Marine	Katina Read	Katina Read
Marine Science		
Astra Zeneca	Paul Duckett	Paul Duckett & Matthew Porter
Living Coasts	Elaine Hayes	
Renewable Energy Provision		
RegenSW	Johnny Gowdy	
Shipping and Ferries		
Marine and Townerage Services	Gerry Carter	

Appendix 2: Strategic Context

In developing a marine economy action plan that works for Torbay, the prioritised actions must support and complement the existing strategies. This section therefore highlights the main principles and objectives listed in these existing strategies in order to provide a framework for the marine economy actions.

Torbay's Community Plan

The Community Plan is the umbrella under which all the other strategies and plans within Torbay sit. Torbay's Community Plan outlines the Strategic Partnership's ambition for Torbay over the next 20 years. Four key challenges were identified during its recent refresh:

- Developing our economy, improving job prospects and responding to the recession;
- Opportunities for older people and the challenges of providing services for an ageing population;
- Climate change – reducing our carbon footprint and the increased risk of flooding; and
- Improving quality of life for the least well off in our society.

The vision:

‘Working for a healthy, prosperous and happy Bay’

The ambition for the Bay is to be an area that:

- Is prosperous and known to be a great place to live and learn and grow up in;
- Is able to compete on a world stage in our traditional industries of tourism and fishing
- Communities know and support each other and enjoy some of the best quality of life in England;
- Widens opportunities and provides high quality employment and retains our young people in the Bay; and
- Celebrates the differences in the three towns, builds on the strengths of these towns and brings back the feel good factor.

The Economic Development Strategy

The *Economic Development Strategy*²⁹ highlights the daunting economic situation faced by Torbay, with disposable income, workplace earnings, productivity measures all significantly below regional and national averages and higher rates of out of work claimant rates and children in poverty. Overall Torbay has been assessed as the 47th most economically deprived out of the 354 local authority areas.

The economic assessment identified the following needs for Torbay:

- To raise its productivity rates;
- To increase full time employment;
- To improve rates of business growth;

²⁹ Torbay Economic Development Strategy 2010-2015, Accepting the Challenge.

- To stimulate or identify new markets for Torbay businesses to provide goods and services for;
- To stimulate the need for a higher level of skills within the economy;
- To develop new commercial, retail and other types of employment space;
- To increase earnings;
- To improve the transport links to and within Torbay to facilitate movement of goods, services and people and to encourage investment;
- To raise skill levels so that individuals improve their chances of employment and their productivity in work;
- To ensure that the economic development of Torbay creates new opportunities for individuals and communities and reduces deprivation; and
- To ensure that all business sectors are developing their workforce.

The economic development strategy therefore sets out a range of actions needed to support growth in jobs and earnings and equality within Torbay.

The over arching vision for the economic development strategy is:

To bring about the physical and economic regeneration of Torbay and deliver the benefits to the local community

Important principles of the strategy are:

- Delivery with **momentum** and **pace** to in order to reverse the relative decline and maintain support of relevant stakeholders;
- The need to be **flexible** in delivery and concentrate on achieving **outcomes**;
- Improving **equality** within Torbay to close the gap between the most and least well off in Torbay; and
- Achieving higher levels of enterprise, wealth creation and full time employment.

Three themes are proposed in the economic development strategy to create the environment for success:

- Stimulating and attracting investment
- Improving business performance
- Raising skills and improving opportunities

The marine action plan has been designed to support the achievement economic development strategy through identifying actions that address the economic needs of Torbay outlined above.

Tor Bay Harbour Maritime Strategy

‘Catching the Wave’ is a ten year strategy which identifies the issues and opportunities facing Tor Bay Harbour and the Bay’s maritime environment in the future, and sets out a cohesive and forward thinking plan to ensure that the harbour not only operates effectively, but that appropriate use is made of all water and harbour side facilities and opportunities are maximised. Tor Bay Harbour Authority strives to enhance Torbay’s maritime offer by:

- Maintaining the highest standards of safety and operational effectiveness.
- Using the statutory powers of the Harbour Authority to fulfil its statutory duties for the purpose of improving, maintaining and managing the harbour.

- Managing the harbour in a financially sound and sustainable manner, maximising income generation to deliver a wider range of services and therefore, support a variety of maritime activities. Including fishing, shipping, estate management, marinas, mooring provision and marine leisure facilities.
- Exploring all opportunities to develop the enclosed harbours of Brixham, Paignton and Torquay.
- Undertaking responsible stewardship of the marine environment and delivering sustainable development of our coast, which allows both the use and protection of our marine resources.
- Raising the profile of Tor Bay Harbour in key areas, including the importance of the local fishery and the quality of that catch; the importance of the sailing and sea conditions for marine leisure pursuits; the ease of access for a range of recreational boating activity; the overall unique mix of maritime activity combined with an excellent safety record.
- Measuring and monitoring the needs, wants and expectations of harbour users, the local community and visitors through clear research, which will focus future delivery.
- Developing robust partnerships with the various stakeholder groups, including both commercial and leisure interests, and other marine based organisations to ensure a proactive and joined up approach to attract and deliver additional port business, and provide further maritime contribution to the local economy.
- Pro-actively invigorate the harbours, widen their catchment and appeal, through sponsorship packages, performance and music, harbour dressing and branding.

Turning the Tide for Tourism in Torbay

Turning the Tide for Tourism is a strategy designed to rejuvenate the tourist offer and reduce the declining number of visitor nights in Torbay. It has three key objectives listed below, and covers the period 2010-2015:

- ***To reduce the decline in visitor numbers and spend;***
- ***To increase the value of tourism to the Torbay economy; and***
- ***To reposition the English Riviera as a leading and inspirational UK destination.***

The strategy places significant emphasis on market led product development and modernising the current tourism offering. It highlights the need for product development to focus on developing opportunities that will attract year round, higher spending visitors to the Bay with a positive impact on the economy through increased employment, footfall and visitor spend. Maritime leisure is identified as one of five product development opportunities and the following key actions were identified as priorities to enable growth:

- Establish maritime leisure product development action group;
- Develop Torbay Week as the English Riviera's flagship maritime event;
- Develop compelling water based 'experiences' and packages;
- Integrate promotion of maritime leisure activities into central destination marketing;
- Improve water front food, drink and retail offering;
- Introduce planning policies that proactively support operators to grow;
- Provision of more visitor boat moorings; and
- Improve the necessary water activity infrastructure and complementary parking.

Torbay Inward Investment Strategy

The purpose of the Inward Investment Strategy is to bring about faster economic growth through new investment in Torbay. The report looks at the strengths of Torbay's offer in a number of sectors; reviews the competitive environment and identifies sectors where Torbay can present a strong case to potential investors. The report also looks at the way investors are attracted to Torbay and presents a number of recommendations for improvement. Key priorities for improving inward investment were:

- **Focus on strengths** – Focusing on sectors where there is a specific asset or success from which to build;
- **Being business friendly and engaging** – Torbay needs to be seen as a business friendly location, known for its commitment to business growth, aftercare support, business advice programmes, networking etc.; and
- **Being aware of the competition, but also knowing when to collaborate** – There is stiff competition from neighbours in Devon, Cornwall and Somerset, but there are also opportunities to promote a combined strength in some sectors – creating a much stronger proposition to potential investors.

The report recommends that marine engineering, marine technology and fish/seafood are included as priority sectors for inward investment.

The Torbay and South Devon Employment and Skills Plan

The key priorities identified by the Employment and Skills Board include raising skill levels and aspirations of both the current workforce and of young people, and reducing economic inactivity. These dovetail with the aims of the economic development strategy which are to increase the levels of Torbay Residents qualified to NVQ levels 2 and 3, improve links with schools, South Devon College and Universities in the region and to encourage work based training within businesses.

Local Development Framework

The LDF is set of documents designed to guide planning and development within local areas. It will also provide guidance on the amount of employment and housing land which should be made available.

The draft spatial planning vision for the Core Strategy is:

'The New English Riviera will become one of the most beautiful seafront cities in Europe, providing a high quality of life, an outstanding natural and built environment and a thriving economy. This will support both the delivery of balanced, prosperous and distinctive communities for all residents in the Bay and a successful 21st Century tourist destination of choice. Torbay will play a vital part of prosperous South Devon. Alongside the cities of Plymouth and Exeter, Torbay in its new City role will provide a complementary urban focus to the primarily urban rural South Devon, with its own unique offer, services and attractions capable of meeting the needs of Torbay and those of the sub-region'

As a sub-set of the LDF, the Torquay Harbour Area Action Plan was produced to help bring together a concerted effort by all parties to address the area's problems and attract new investors and interest. The vision for the plan is therefore

‘To fulfil the Harbour area’s potential, it will become a place of exceptional quality and a showcase for the ‘New English Riviera’, highlight regarded and used by the local community and visitors to the Bay’.

Greenspace Strategy

The Greenspace Strategy forms a Supplementary Planning Document (SPD) in the emerging Torbay Local Development Framework (LDF). Many people in Torbay appreciate the benefits which green spaces bring to their lives. There is increasing civic and public awareness of the value of good quality parks, playing fields, play areas and other green spaces in regeneration, improving health and well being and providing educational and other opportunities for all residents. However, not everyone has access to or uses a local park or green space which meets their needs and interests. In some cases there are conflicts of interest between different uses of green spaces. Decisions have to be made about priorities.

The quality of Torbay’s green spaces needs to be maintained and in some cases improved. Torbay’s Greenspace Strategy sets out a vision and action plan to regenerate and maintain these priceless assets so they become more attractive, accessible, safe and well used by everyone.

The vision of the strategy is to:

“Encourage greater use of green spaces by local people.”

In order to achieve this, the following objectives have been set:

- Improving appearance of green space.
- Improving accessibility, especially for the disabled.
- Challenging people’s perceptions of green spaces as areas to visit and use more often.
- Improving facilities and attractions.
- Increasing numbers of events/entertainments.
- Developing opportunities for using green spaces for learning.
- Promoting and protecting the heritage assets of Torbay’s green spaces.
- Promoting green spaces as drivers for economic activity.
- Recognising, protecting and enhancing the biodiversity value of green space.

Appendix 3: Potential Funding Sources

The table below identifies the main sources of international, national and local funding for economic development activities. Some of these sources might be suitable for some of the potential actions listed in the interim report. The appropriateness of these funding sources will need to be further tested by lead partners as potential actions/projects are developed. Other funding sources might also be available. Funding sources have been loosely grouped around the three themes identified in the action plan, although some funding sources may straddle more than one area.

Stimulating and Attracting Investment

Name	Sustainable Transport
Funding Body	Department for Transport
What is it for?	£560m to support initiatives which address growth and carbon at a local level • Opportunity to influence travel behaviour locally - lots of evidence of what works • Targeted, modest investments - packages of complementary measures
Size of Pot	£560m

Key Criteria	• support the local economy • reduce carbon emissions • also: • deliver wider accessibility & social inclusion • improve safety • improve local environment & air quality; reduce noise • promote increased levels of physical activity • and demonstrate • deliverability • local buy in – local contribution • financial sustainability • value for money • affordability within constraints of fund
Timeframe	Next round – Feb 2011
Commentary	Torbay Council has just submitted an application to support the infrastructure needed to support a ferry service across the bay.

Name	Growing Places Fund
Funding Body	DCLG and DfT
What is it for?	The Growing Places Fund can be used to establish revolving funds to take forward a range of projects that can help facilitate economic growth, jobs and house building in the local area, providing returns which can be re-invested locally. Through this, Local Enterprise Partnerships will be able to offer secure funding to developers in their area, making it quicker for projects to get off the ground but also securing a return on that investment for the local area.
Size of Pot	£14.26m allocation for Heart of the SW LEP
Key Criteria	Types of projects could include: <ul style="list-style-type: none"> ▪ early development of strategic link roads and access works to unlock major mixed-use developments, enabling the delivery of homes and commercial space - leading to the creation of jobs and securing private investment ▪ provision of flood storage capacity to enable development of homes, employment space and retail space; and ▪ works to improve local connectivity and reduce congestion through interventions such as extending dual carriageways, enabling developments to be taken forward sustainably.
Timeframe	LEPs were required to submit proposals by December 2011 – decisions will be expected by end January 2012.
Commentary	If the Heart of the South West LEP is successful in securing Growing Places Funding, there may be a small opportunity for marine infrastructure projects to benefit.

Name	Interreg4a
Funding Body	Région Haute-Normandie is the Managing Authority
What is it for?	The Interreg IVA France (Channel) - England programme aims to promote the emergence - between the French and English parties - of a space of common citizenship fostering a sense of belonging to a cross-border area, and endowed with a specific identity.
Size of Pot	173.4m euros
Key Criteria	<ol style="list-style-type: none"> 1) Reinforce the sense of belonging to a common space and the awareness of shared interests e.g. projects promoting mutual learning of language and culture 2) Build partnerships between players involved in cross-border economic development, and between centres of excellence e.g. projects supporting the launching of new enterprises 3) Build an attractive common space to live in and visit e.g. projects sharing in cultural activities 4) Ensure sustainable environmental development of the common space

	e.g. projects promoting renewable energies
Timeframe	The next round of bidding commences on the 12 th March with submission of a pre-project sheet.
Commentary	Interreg projects must involve partners from both sides of the channel, therefore a key element of achieving interreg funding is the process of building a partnership based on a common idea. Torbay could join a number of pre-existing partnerships relating to a particular project idea (if there is a suitable match with the marine economy action plan) or look to set up a new interreg partnership.

Name	Flood and Coastal Resilience Partnership Funding
Funding Body	Defra
What is it for?	Defra has announced changes to the way funding will be allocated to flood and coastal defence projects. Instead of meeting the full costs of just a limited number of schemes, the new partnership approach to funding flood and coastal resilience will mean Government money is potentially available towards the costs of any worthwhile scheme. Funding levels will be based on the numbers of households protected, the damages being prevented, and the other benefits a project would deliver. Overall, more schemes are likely to go ahead than if the previous 'all or nothing' approach to funding were to continue.
Size of Pot	£2.1bn by March 2015
Key Criteria	<p>Three aspects of a project will influence the amount of national funding available:</p> <ul style="list-style-type: none"> ▪ The value of benefits for householders as a result of flood or coastal erosion risks being managed, especially in deprived areas and where risks are significant. ▪ The value of other benefits achieved, such as the benefits to businesses, agricultural productivity and protection for national and local infrastructure, across the whole-life of the scheme. ▪ The environmental benefits of the scheme, needed to maintain healthy ecosystems as well as offset any habitats lost when defences are built to protect people and property. <p>The maximum amount of funding for a project will be based on multiplying each of the aspects above by a set of payment rates, which are fixed amounts of national funding per unit of outcome or benefit achieved. Payment rates for protecting households will be higher in deprived areas, so that schemes in these areas are more likely to be fully funded by Government.</p>
Timeframe	Arrangements in place till 2015
Commentary	This funding could be used in relation to preventing coastal erosion in Paignton.

Name	Heritage Lottery Fund
Funding Body	National Heritage Memorial Fund
What is it for?	<p>The Heritage Lottery Fund (HLF) sustains and transforms a wide range of heritage through innovative investment in projects with a lasting impact on people and places. As the largest dedicated funder of the UK's heritage, with around £375million a year to invest in new projects and a considerable body of knowledge, we are also a leading advocate for the value of heritage to modern life. From museums, parks and historic places to archaeology, natural environment and cultural traditions, we invest in every part of our heritage. Key programmes include</p> <ul style="list-style-type: none"> ▪ Heritage Grants (Grants above £50,000) <p>This is our main programme for grants over £50,000 for all kinds of heritage that relate to the national, regional and local heritage of the UK. It is open to all not-for-profit organisations.</p> <ul style="list-style-type: none"> ▪ Your Heritage (£3,000 to £50,000) <p>This is our general small grants programme for all types of heritage projects. It is a flexible programme particularly designed for voluntary and community</p>

	<p>groups and first-time applicants.</p> <ul style="list-style-type: none"> ▪ Young Roots (£3,000 to £25,000) <p>This programme is for projects led by young people. It aims to involve 13-25 year-olds in finding out about their heritage, developing skills, building confidence and promoting community involvement.</p> <ul style="list-style-type: none"> ▪ Townscape Heritage Initiative (£500,000 to £2,000,000) <p>Townscape Heritage Initiative makes grants that help communities to regenerate Conservation Areas displaying particular social and economic need.</p> <ul style="list-style-type: none"> ▪ Parks for People (£250,000 to £5million) <p>Parks for People is for whole park projects that support the regeneration of existing designed urban or rural green spaces, the main purpose of which is for informal recreation and enjoyment.</p> <ul style="list-style-type: none"> ▪ Landscape Partnerships (£250,000 to £2million) <p>This programme supports schemes that are led by partnerships of local, regional and national interests, which aim to conserve areas of distinctive landscape character throughout the UK.</p> <ul style="list-style-type: none"> ▪ Skills for the Future (£100,000 to £1million) <p>Skills for the Future funded projects which provide paid training placements to meet a skills gap in the heritage sector, and fully support trainees to learn practical skills.</p> <ul style="list-style-type: none"> ▪ Repair Grants for Places of Worship (From £10,000 to £250,000) <p>Funding for urgent, high-level repair work to listed places of worship. The scheme is managed separately in each of the four countries of the UK.</p> <ul style="list-style-type: none"> ▪ Catalyst: Endowments (Grants of £500,000 to £5million) <p>Catalyst: Endowments is a £30m investment in a match-funding initiative for the creation of endowments to support the UK's heritage from the Heritage Lottery Fund and the DCMS.</p>
Size of Pot	£375m/year
Key Criteria	Depends on programme priorities
Timeframe	Depends on programme
Commentary	Some of the proposed marine economy action plan ideas have cultural elements to them – HLF might therefore be a useful sources of funding.

Improving Business Performance

Name	ERDF 'Competitiveness'
Funding Body	DCLG
What is it for?	<p>The Competitiveness programme has four objectives:</p> <ul style="list-style-type: none"> ▪ Increasing productivity of the region's business base, through the promotion and support of innovation, research and development and the application of knowledge ▪ Reduce intra regional disparities through stimulating enterprise and accelerating business growth in those parts of the region lagging behind ▪ To increase employment and enterprise in the region's most disadvantaged communities and ▪ Protect and enhance the region's environmental assets and work towards developing a low carbon economy
Size of Pot	<p>£106m of which £59m is committed</p> <ul style="list-style-type: none"> ▪ £38.4m in priority 1 of which £22m is committed. ▪ £38.4m in priority 2 of which £29 is committed ▪ £25.6m in priority 3 of which £5.4m is committed
Key Criteria	The competitiveness Programme manages its development pipeline through a commissioning approach. The commissioning approach means partners have

	agreed the type of activity they wish to see happen and the results the Programme requires to be successful, but the method of delivery is not fixed. The programme Monitoring Committee (PMC) agrees programme strategy. On behalf of the PMC the commissioning delivery board commission activity that will determine the exact shape of a proposal and identify a project partner.
Timeframe	Up to December 2013
Commentary	Most remaining non-committed funding has been provisionally aligned with other projects in the economic development strategy.

Name	Regional Growth Fund
Funding Body	The Department for Business Innovation and Skills
What is it for?	The Regional Growth Fund (RGF) is a £1.4bn fund operating across England from 2011 to 2014. It supports projects and programmes that lever private sector investment creating economic growth and sustainable employment. It aims particularly to help those areas and communities currently dependent on the public sector to make the transition to sustainable private sector-led growth and prosperity.
Size of Pot	Originally £1.4m increased to £2.4m
Key Criteria	To qualify for support from the Regional Growth Fund, projects should demonstrate that they: <ul style="list-style-type: none"> ▪ create additional sustainable private sector growth; ▪ rebalance the economy in those areas currently dependent on the public sector; ▪ would not otherwise go ahead without support from the Regional Growth Fund; ▪ offer value for money; and ▪ state aid compliant
Timeframe	The fund is expected to operate from 2011 to 2014. Two rounds of bidding have already been completed. Round three expected to be launched in February 2012.
Commentary	This is a highly competitive source of funding – applications need to be demonstrably private sector led and result in actual jobs. Unlikely to be successful for more generic infrastructure or public realm projects.

Name	Grants for Business Investment
Funding Body	ERDF Secretariat (DCLG)
What is it for?	<p>Grant for Business Investment offers grant support for sustainable business investment and job creation projects in South West England, and is part of a suite of highly targeted, publicly funded products and services known as Solutions for Business.</p> <p>The ERDF Secretariat manages the ERDF Grant for Business Investment scheme aimed at businesses of all sizes looking to invest in the areas supported by the Convergence and South West Competiveness Programmes and who need a grant to take their vision forward.</p> <p>The scheme focuses support on high-quality, innovative, knowledge-based projects that lead to long-term improvements in productivity, skills and employment. The majority of jobs created are expected to be at NVQ Level 2 and above.</p> <p>Projects such as launching a new business, expanding existing companies, introducing new technology into manufacturing, or taking a new product into production will be eligible for support.</p>

Size of Pot	The minimum threshold for grant applications is £10,000.
Key Criteria	<p>Each application has to meet certain criteria:</p> <ul style="list-style-type: none"> ▪ demonstrate strong additionality (need for grant) and proven need for financial support ▪ display quality features, such as good skills levels and productivity growth measured by Gross Value Added. Good skill levels are reflected in higher salary levels and generally projects are only supported where salaries are in excess of £20,000 ▪ projects must be funded mainly by the applicant or from other private sector sources ▪ projects must involve capital investment on fixed assets such as property or machinery ▪ projects must create new jobs or safeguard existing employment above the average skill levels ▪ projects should be viable, competitive and profitable ▪ projects should not be irrevocably committed prior to the application ▪ projects should provide positive benefits to both the local and national economy ▪ supply markets other than local without displacement of similar businesses ▪ contribute towards the Programme's low carbon ambitions.
Timeframe	In line with Competitiveness programming period - up to 2013.
Commentary	May be suitable for individual SMEs to take forward.

Name	European Fisheries Fund
Funding Body	Marine Management Organisation
What is it for?	<p>The European Fisheries Fund (EFF) aims to help the fishing industry to become more sustainable and to remain profitable. Through the scheme around £38 million is available in England.</p> <ul style="list-style-type: none"> ■ Axis 1: Measures for the adaptation of the community fishing fleet, such as improvements on board fishing vessels. ■ Axis 2: Measures for investments in aquaculture and processing, and for marketing of fishery and aquaculture products. ■ Axis 3: Measures of common interest, such as harbour and port developments which will benefit fishermen.
Size of Pot	Approximately £38m, £11.5m Axis 1, £4.3m Axis 2 and £12m Axis 3
Key Criteria	<p>The criteria are arranged under five headings:</p> <ul style="list-style-type: none"> • economic, social and environmental – representing the three pillars of sustainability and the stated EFF objectives • alignment – addressing the extent to which the project complements other development initiatives and plans • project management – addressing the level of confidence that the project will deliver its stated benefits.
Timeframe	Up until December 2013
Commentary	May represent a useful sources of funding for fishing related actions.

Name	European Maritime and Fisheries Fund
Funding Body	Likely to be DEFRA/MMO
What is it for?	<p>The Commission published the European Maritime and Fisheries Fund proposals on 2 December 2011. The proposals aim is to achieve the objectives of the Common Fisheries Policy (CFP) and the Integrated Maritime Policy (IMP). The major difference between the EMFF and EFF is the inclusion of the IMP (i.e. marine spatial planning and integrated coastal zone management; international instruments; and the reformed marketing regime).</p>
Size of Pot	£6.6bn Europe wide
Key Criteria	<p>The EMFF is structured around four pillars:</p> <ul style="list-style-type: none"> ■ Smart, Green Fisheries; intended to help address discards, support fisheries which are less damaging to the marine environment, support innovation value added, and build resilience to external factors; ■ Smart, Green Aquaculture; which aims to help aquaculture businesses achieve economic viability and competitiveness; ■ Sustainable Development of Fisheries Areas; targeted at reversing the decline of many coastal and inland communities dependent on fishing; and ■ Integrated Maritime Policy (IMP); which includes a number of cross cutting measures including maritime surveillance, data sharing, Marine Spatial Planning (MSP) and Integrated Coastal Zone Management (ICZM). The funding under this pillar will be held by the Commission and centrally distributed.
Timeframe	2014-2020
Commentary	This is likely to be a useful sources of future funding, but the full details are still subject to consultation and refinement.

Name	Technology Strategy Board
Funding Body	Technology Strategy Board
What is it for?	The Technology Strategy Board is currently funding a technology roadmap and assessing the UK's capabilities across different sectors of the marine industry. These will help the Board to decide, in consultation with business, how to ensure that its future support for marine research and development creates the opportunity to maximise the economic growth of marine companies across the UK. Through these studies, sixteen of the highest priority opportunities have currently been identified, taking into account both their attractiveness to the global and UK markets and their fit with UK capabilities. These range from engine technologies with reduced emissions and marine biofuels to the construction of offshore renewable energy assets and marine ICT.
Size of Pot	Not yet known
Key Criteria	A competition for R&D grant funding is expected to open in 2012 once the roadmap is complete. Applications for funding and awards for contracts are invited through a range of competitions which address a specific area of priority identified by the Technology Strategy Board as being of critical importance to the growth of the UK economy. Research & Development competitions are mainly collaborative; however with exception may be single company. Applicants are advised to check the Competition Brief carefully for the rules being applied to individual competitions.
Timeframe	Competition in 2012
Commentary	Technology Strategy Board competition funding is for innovation and research into specific problems. There may be scope for Torbay's businesses and educational institutions for become involved in one of these collaborative projects if they have the relevant capacity to do so. However, it is not suitable for traditional economic development projects and initiatives.

Raising Skills and Improving Opportunities

Name	Coastal Communities Fund
Funding Body	Big Lottery/HM Treasury
What is it for?	This new fund is designed to support the economic development of coastal communities and will support a wide range of projects, including those that support charities, the environment, education and health.
Size of Pot	The fund will be linked to the revenues that are raised by the Crown Estate's marine activities each year. For example, in April 2012 there will be £23.7 million available in the Coastal Communities Fund, this is based on a 50 per cent share of the £47.4 million revenue raised by the Crown Estate's marine activities in 2010-11.
Key Criteria	The definition of a coastal community, for the purposes of the Coastal Communities Fund, is defined as any coastal settlement within a local authority whose boundaries include UK foreshore, including local authorities whose boundaries only include estuarine foreshore.
Timeframe	The fund has now opened with expressions of interest to be submitted by end of March 2012
Commentary	Until more detail is available it is not clear how this fund could be used to support the implementation of the Marine Economy Action Plan.

Name	ESF
Funding Body	DWP
What is it for?	The European Social Fund (ESF) aims to improve employment and skills in the European Union and raise standards of living; the current round of ESF funding runs from 2007 to 2013.
Size of Pot	For the Competitiveness Area a total of 144.1m Euros is available, and the priority Axes are: <ul style="list-style-type: none"> ■ Extending Employment Opportunities ■ Developing a Skilled and Adaptable Workforce
Key Criteria	Projects are commissioned through three co-financing organisations, the Skills Funding Agency, JobCentre Plus and the National Offender Management Service. The majority of co-financed provision for the second half of the programme was procured in 2011.
Timeframe	Ending December 2013
Commentary	As the majority of funding has already been allocated, it is unlikely that ESF could be used to fund specific skills projects within the marine economy action plan. However, it may be possible to engage with the relevant ESF providers in Torbay to ensure that marine skills and the needs of marine related businesses are included in the ESF commissioned work.

Name	Growth and Innovation Fund
Funding Body	UK Commission for Employment and Skills and the Skills Funding Agency
What is it for?	The Growth and Innovation Fund (GIF) will help employer groups overcome barriers to growth within their sectors and industries. The funding could deliver new training to boost innovation and productivity, enable industries to set new professional standards, or support new or extended National Skills Academies
Size of Pot	£50m/year
Key Criteria	It invites proposals from employer organisations such as Sector Skills Councils, professional bodies and trade associations to deliver the three types of projects.
Timeframe	2015
Commentary	This funding source is designed for employer led organisations to apply for. Therefore it is unlikely to be directly applicable to any of the actions outlined in the action plan. However, there may be an opportunity to ensure local delivery of

	activity is aligned to the needs of relevant marine sectors in Torbay.
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