



Campbell Macrae Associates

Fife Harbours Strategic Study

**by
Campbell Macrae Associates**

**For
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Executive Summary

Fife has a long coastline and a rich resource of harbours, many of which benefit from at least some leisure activity, often through active sailing/angling clubs and other user groups. The estimated economic impact associated with sailing, cruising and leisure angling in Fife is £1.34m annually and there are estimated to be around 900 leisure vessels and around 500 active dinghy club members currently using Fife's harbours and beaches. Fife continues to attract visiting vessels but although the numbers have increased since the 2003 study, they remain modest and supporting infrastructure is limited.

Many harbours in Fife, in common with the East Coast in general, are tidal, drying out every day and many require expensive dredging as part of their maintenance regime to keep them useable. Several harbours in Fife are now at capacity and some have waiting lists. However, it is challenging to identify locations where growth can be accommodated cost effectively.

From a leisure sailing perspective, the East Coast, including Fife, continues to suffer from lack of awareness, poor perceptions, lack of marketing and a lack of infrastructure.

Anstruther Harbour remains the focus for leisure sailing in Fife; it has the largest capacity, the best supporting infrastructure and is well integrated into the town centre meaning there is good scope to secure economic impact.

Anstruther, St Andrews and Tayport emerge as those harbours presenting the best leisure development potential – the same locations as in the 2003 study. However, there is potential to increase leisure activity at many other harbours in Fife.

The strategic aim of this strategy is

“To grow Fife’s leisure harbour resource, thus securing additional economic benefits locally and enhancing Fife’s tourism and leisure portfolio.”

Recommendations focus on the inter-related priorities of partnership working, increasing awareness and improving marketing, increasing capacity (where possible), exploring ways of overcoming tidal harbours, improving supporting infrastructure for harbour users and capitalising on dry tourism opportunities.

Section 1 Introduction and Background

1.1 Background

Sailing is a valuable market within Scotland's tourism portfolio and is projected to grow significantly over the next few years and the recent launch of the Scottish Government's *Marine Tourism Strategy* provides the context for this. Whilst the West Coast has a significantly higher share of the leisure sailing market than the East Coast, Fife Council is keen to ensure that Fife is in a position to capitalise on this growing market and other coastal and water-based leisure activities.

Fife has a long and varied coastline encompassing the north side of the Forth and the south side of the Tay estuaries and there are at least 38 ports, harbours and what are

termed “*marine installations*” (jetties and piers). Many of Fife’s harbours are located in relatively close proximity to each other and around 30% are owned by Fife Council. Many are of historic significance, being old fishing harbours or having functioned as industrial ports in the past. Many are listed or contain listed structures, and some are in a less than ideal state of repair. Many benefit from at least some leisure activity, but in general terms there is limited economic impact around most harbours, many of which are not well integrated into their settlements. Anstruther is the key harbour from a leisure perspective, whilst Pittenweem is Fife’s main commercial fishing harbour albeit now majoring on shellfish, rather than white fish. Rosyth, Burntisland, Kirkcaldy and Methil (1 and 2 Docks only) are all within the Fort Ports Ltd portfolio and continue to function as commercial ports.

In 2003 Fife Council commissioned a strategic study of all of Fife’s ports, harbours and similar structures. This provided a comprehensive audit of ownership/management, facilities, use/users and general state of repair and also developed a hierarchy in terms of suitability for the development of leisure sailing activity. Anstruther was identified as the main hub for leisure sailing and indeed investment in new pontoons subsequently took place. There is currently known interest in developments at North Queensferry and in St Andrews and various funding streams are being targeted. During the course of this study it became clear that there are also ambitions for leisure related developments at or around several other harbours including at Tayport, St Monans, and Burntisland.

Fife Council has decided it is an appropriate time to develop a refreshed strategy and action plan to guide the future development of Fife’s harbours from a leisure perspective.

Campbell Macrae Associates has been appointed to undertake this assignment and is reporting to a client group comprising representatives from Fife Council’s Economy, Tourism and Town Centres team, and Transportation, the service which looks after Fife Council’s own harbours.

Campbell Macrae Associates acknowledges the valuable input into this assignment from owners, clubs, other user groups and interested parties, as well as from a range of bodies with an interest in Fife harbours and sailing. Details of those contacted during the course of this study are included at Appendix 1. However, unless otherwise stated the views expressed in this study are those of Campbell Macrae Associates.

Note that throughout the rest of this study the term harbours should be regarded as encompassing all types of ports, harbours, piers and jetties. Also note that definitions of terms such as dredging, pontoons, bilge keel, slipways, impounded water, etc are provided at Section 1.4 of the Annex document. The Annex is a companion to this document and provides details of all of the harbour locations within this study in terms of facilities, use, and users.

1.2 Aim and Scope

The aim of this assignment is to:-

“Produce a strategic study and action plan for the development of Fife’s coastal communities and harbours.”

Within this aim the following objectives have been addressed and incorporated:

- The 2003 audit and appraisal of existing harbour facilities and other marine and coastal leisure facilities in Fife, including their current levels of use and relative importance to the leisure/tourism market has been revisited and updated.
- An analysis and review of the current and projected future demand for coastal leisure sailing and other marine and coastal leisure activities in Fife has been developed.
- An assessment framework has been developed and employed to determine the suitability of all audited harbours/marine structures for further leisure development.
- Actions at the Fife level and for specific locations have been suggested but these are not at a stage where they can be regarded as concrete proposals. Hence it is not meaningful or possible to provide approximate costs, potential sources of funding and indicative economic impact. However, Section 5.2 provides an assessment of the current estimated economic impact of Fife's harbours and Section 5.4 provides details of the potential sources of funds that might be applicable for harbour projects.
- This resulting strategy/action plan sets the strategic context for Fife's harbours and is capable of supporting applications for external funding.

Whilst the main focus of this study has been on leisure sailing, it also encompasses other water-based leisure activity such as sea angling, coastal rowing, cruise ships and waterborne passenger services.

1.3 Outputs

The outputs of this assignment are:

- An updated audit and appraisal of Fife's current harbour facilities.
- An analysis of current and projected demand for coastal leisure sailing and other coastal leisure activities in Fife.
- Sections 5.8 – 5.10 form the basis for the strategic Action Plan.

1.4 Methodology

Audit Visits

As in the original study, visits were made to as many locations as possible to establish facilities, use, access, scope for economic impact, etc, using a standard checklist (see Appendix 2). An assessment of the general relationship between the harbour and the settlement was made and any related commercial activity was noted. A photographic

record was also made. A detailed report of all harbours is provided as a separate Annex but the key points are summarised within this document.

The basis for the list of those harbours to be included in the study was the *Ports and Harbours Emergency Plan* (Fife Council, December 2001). It is accepted that this may not include all harbours, ports and other marine structures but it will encompass the main ones that are currently operational and active.

The Forth Yacht Clubs Association (FYCA) Pilot Handbook (2011 edition) also provided a wealth of information about individual harbours, their facilities, sailing conditions, etc. The previous study of 2003 was also used as a reference source.

The audit visits were made during late November 2014, December 2014 and early January 2015. This is not the ideal time to gain an accurate impression of the real level of leisure activity around Fife's harbours but the previous study took place at this time of year so the findings are comparable in that respect.

It was not appropriate to visit the following locations:

- Kincardine – the disused long jetty upstream of the Kincardine Bridge, owned by Scottish Power
- Longannet - industrial use, owned by Scottish Power
- DM Crombie – owned by Defence Storage and Distribution Agency and strict military use only
- Rosyth – industrial port but also a landing port for cruise liners and a base during the construction of the Queensferry Crossing
- Braefoot – oil exporting industrial use.

No visits were made to the island locations of Inchcolm, and the Isle of May as the audit was undertaken outwith their seasonal opening months. No visit was made to Inchkeith, also an island.

No visit was made to the old steamer pier at Port Laing near North Queensferry as it cannot be accessed by road and in fact, as it is understood to be a ruined structure, it was agreed that it should not be included in this study.

An effort was made to visit Carron Harbour (Starleyburn) near Burntisland but the gates were locked and no access was possible. It is understood that this harbour is privately owned but is in a poor or even unsafe state of repair.

The pier at Anstruther Wester, which is owned and maintained by Fife Council Transportation Service, was added into the previous list of audited ports, harbours and other marine structures giving a total of 38 in all or 37 after removing Port Laing, of which 29 were visited and audited.

Consultation with Owners and Clubs/Users

At an early stage in the study efforts were made to draw up a comprehensive consultation list including owners, clubs and other types of user groups. Most were then contacted by e-mail and invited to participate in the study. Those with no e-mail address were contacted by telephone and/or letter. A checklist of topics for owners was drawn up and another for clubs and other user groups. These checklists are included at Appendix 2.

A wide variety of issues and views were explored with owners including operational considerations, long term ambitions, available resources, extent of leisure sailing (and other related leisure activity), extent of remedial works required and ideas for more leisure activity. Discussions with clubs and other user groups centred on use of their current facilities, their membership, demand, aspirations, views on East Coast sailing, etc. Discussions with owners, clubs and other users have been cross referenced with what was gathered in the 2003 study to identify what (if anything) has changed.

There has been a very good response to the consultation and input has been received from almost all owners, clubs and other user groups. Where available, owner, club and user group websites have also been trawled for information. On-site meetings with owners, clubs and community interest groups were held in several locations including Limekilns, Burntisland, Dysart, St Monans, St Andrews and Tayport.

A press release about the study was issued in early January 2015 and news of the study also featured on the Fife Tourism Partnership website. Unfortunately the response to the press release has been limited, with only a few people getting in touch. Fife Council also drew up a short survey for harbour users. This was also publicised through the press release but again there was only a limited response.

Desk Research and Consultation with Other Interested Parties

Desk research into market demand has been undertaken although there is no up to date market research and we have relied mainly on the 2010 *Sailing Tourism in Scotland* report commissioned by Scottish Enterprise to set the market context.

Consultation has been undertaken with a range of other bodies and interested parties to seek their views and input on Fife harbours, the scope for increasing leisure activity, East Coast sailing, etc. Organisations consulted include Fife Coast and Countryside Trust, The Forth Estuary Forum, The Tay Estuary Forum, Forth Yacht Clubs Association, Scottish Canals, SailScotland, RYA Scotland, VisitScotland, EventScotland and the Crown Commissioners. We have attended the annual Fife Council Harbour's Users Meeting and Forth Ports annual meeting for small harbours and sailing clubs. We also provided details of the study to the Cross Party Parliamentary Group on Recreational Boating and Marine Tourism and Fife Council is invited to make a presentation about the study/strategy at its meeting on 16th June 2015.

Contact has been made with neighbouring local authorities, and other authorities on the East Coast of Scotland to assess the scope for joint working and synergy and to find out about any plans/proposals for their harbours and coastal resources. The response to this has been very positive and is discussed at Section 4.6.

Water-based activity in Fife, but particularly sailing, cannot be viewed in isolation and the previous study made suggestions about developing links and joint marketing activity with other East Coast sailing locations to the north and the south as a way of increasing leisure sailing activity in Fife. This has been revisited and it is suggested that such activity could potentially form the basis for a co-operative LEADER project along the length of the East Coast of Scotland and possibly extended into England (and perhaps even beyond). LEADER is a European fund aimed at stimulating a bottom-up, partnership based approach to rural development and one strand of LEADER specifically seeks to encourage co-operation between different geographic areas.

Engineering Input/Aspects

This is not an engineering study and comments made on the current physical condition of harbours have been made based on a short visit and a visual inspection only.

Several old studies including *Fife Harbours Report* (Gilchrist Environmental Consultant, 1995), *New Life for Old Harbours* (Gilchrist Environmental Consultant, 1996) and *Fife's Coastal Renaissance, Preliminary Technical Assessment of Harbours and Development Potential* (Arch Henderson, 1996) were used as a reference source in the 2003 study. Whilst these studies are now very old, much of what they contain is still relevant in terms of tidal conditions, siltation and the state of repair of some harbours which have not benefited from recent investment and these are referenced accordingly.

The brief required that approximate costs should be provided for any capital works identified as necessary or desirable to help unlock or further develop leisure potential at Fife harbours. However, the study budget was such that it could not accommodate detailed technical engineering input. It was agreed at the outset that that wherever possible Campbell Macrae Associates would seek to identify existing cost estimates and/or reference works at other similar harbours/structures rather than provide detailed cost input. This has worked well as most owners, and clubs/users have an indicative cost estimate for any capital projects they aspire to deliver.

However, during the course of the assignment some potential projects were identified that might benefit from more detailed engineering consideration and these are encompassed in Section 5.10.

Stakeholder Involvement

The Interim and Draft Final Reports have been discussed with the Fife Council client group and the final report has been presented to and discussed with the Fife Council Harbours Group. It is planned to invite all consultees to a presentation to discuss the findings of this study as such an approach should prove beneficial in securing buy-in and instrumental in taking projects forward. A separate meeting of east coast local authorities will also be convened to discuss the potential to establish an east coast sailing/waterborne tourism group.

Section 2 Overview of Fife Ports, Harbours and Other Marine Structures

2.1 Overview of Fife Harbours

The Fife coastline runs from Kincardine in the south west to Newburgh in the north west and is around 105 miles long. The Fife coast includes many towns and villages from major settlements like Kirkcaldy, to attractive small villages like Culross and Cellardyke. The Fife coastline encompasses the Firths of Forth and Tay, with a short section directly on the North Sea. It is understood that there are no naturally occurring harbours in Fife and all are man made. Further, there are no purpose-built recreational harbours and all harbours now used for leisure purposes were originally constructed for commercial purposes related to fishing, industries such as coal or as part of the transport infrastructure.

There are two key limitations associated with the use of Fife harbours from a commercial or leisure perspective and indeed these are common to many East Coast harbour locations. The first is that the geology of this coast means it is inherently unsuitable for providing deep water harbours. Thus East Coast harbours were generally designed to enable commercial use but at an economic cost, resulting in ships with a 10 or 14 foot draft being able to enter and leave the harbours only fairly near to high tide, with the whole harbour drying out as the tide ebbed creating a drying harbour. The common description is "*a half-tide harbour*", and access is generally restricted to a few hours before and after high tide and many harbours dry out completely. This leaves harbours visually unattractive and restricts the size and type of vessels that can use many Fife harbours to those with a shallow draft and twin keel vessels (bilge keel) that are able to rest comfortably on the harbour floor. The drying nature of Fife's harbours also means that trips and activities out of and into harbours must be well planned to marry up with access considerations. In Fife the only deep water all tides access harbours are the ports of Rosyth, Burntisland and Methil (and possibly Inverkething Bay), and the inner basin of Pittenweem Harbour is also accessible at all states of the tide.

The second limitation is associated with the first, and is that regular dredging to remove the build up of silt and keep harbours at a useable depth is required at many Fife harbours. However, dredging is very expensive (e.g. planned dredging at Anstruther is estimated as costing around £90,000) meaning only the busier harbours are generally dredged – Pittenweem, Anstruther, St Monans, Tayport and the commercial ports. The need for dredging is one of the major costs associated with many Fife harbours although some, due to their location, benefit from being naturally flushed out by wave action or streams/small rivers e.g. St Andrews. Some consultees have highlighted dredging as a way of increasing activity at Fife harbours but perhaps do not appreciate the potentially massive costs that dredging entails and that it is not generally a one-off task and needs to be undertaken every few years.

Fife has very many harbours, often located in relatively close proximity to each other i.e. at least 34 harbours over 105 miles of coastline (not including the three islands) gives a harbour every three miles or so. Many of Fife's harbours are of historic significance and many are listed structures. Whilst this wealth of harbours can be viewed as a strength, it is also a challenge in terms of the maintenance burden and means that harbours will generally be targeting the same sources of funding for capital works, improvements and development.

As detailed in the Annex, most harbours in Fife benefit from at least some activity (leisure, fishing or commercial) but this is low key at some. Anstruther with its 100 pontoon berths and over 50 other berths is undoubtedly the leisure sailing capital of Fife. It also benefits from good supporting infrastructure for leisure users and with its retail and catering outlets provides good opportunities to secure economic benefits. Dinghy sailing is popular at several sandy beaches including Dalgety Bay, Kinghorn, Lower Largo and St Andrews. Pittenweem remains the key commercial fishing harbour in Fife but there is some commercial activity at other locations including St Monans, Crail, Methil and West Wemyss, with leisure sea angling popular at Kirkcaldy. The commercial development activities in and around Kirkcaldy and Methil means these ports have been transformed since the previous study. Since the previous study coastal rowing has emerged as a new activity in many of Fife's coastal communities.

Marketing activity associated with the leisure resource of Fife's harbours is very low key and this combined with access and drying out considerations all serve to act as a disincentive for visiting leisure vessels although there has been some limited growth since the previous study.

Forth Ports Ltd is the Statutory Port Authority for both the Forth and the Tay estuaries and is responsible for managing these waters and for safety.

The sections below summarise the key findings of the study's research, with full details of individual harbours found in the Annex. Note that harbours in the tables are generally ordered geographically from Kincardine to Newburgh.

2.2 Ownership of Fife Harbours

From Table 2a below, it can be seen that Fife Council is the most significant owner of harbours in Fife, followed by Forth Ports Ltd. Only two clubs, Dalgety Bay Sailing Club and Methil Fairway Boat Club actually own their sites – both coincidentally purchased for only a £1 from the previous owners.

The Crown Estate manages the seabed out to a distance of 12 nautical miles and also manages around half of the foreshore in Scotland. However, in Fife only small areas of the foreshore are within Crown Estate ownership.

Owner	Harbours	Comment
Fife Council	Culross	But not part of Transportation portfolio or responsibility.
	North Queensferry – West Bay area	As from June 2015 will be leased to North Queensferry Community Trust for 50 years. This will not include the Railway Pier which is in a relatively poor state of repair.
	North Queensferry Town Pier	
	Aberdour	Long standing arrangement with Aberdour Residents Association and a sub group of this, the Pier and Harbour Committee, is responsible for managing the harbour. Not a formal lease but works very well.
	Pettycur	
	Dysart	Long lease to Dysart Sailing Club in force until 2093.
	St Monans	
	Pittenweem	
	Anstruther Wester	
	Anstruther	
	Cellardyke	
Crail		

	Wormit (Woodhaven)	Managed by Wormit Boating Club but no formal lease.
Forth Ports Ltd	Rosyth	But parts owned by Babcock Marine as Rosyth Royal Dockyard Ltd.
	Inverkeithing	Forth Ports owns parts of Inverkeithing but there is a long lease with RMS (ship breakers). Other owners are unknown.
	Burntisland	Parts are leased to Briggs Marine, BiFab and Scot Timber and possibly others. Burntisland Sailing Club also has a lease and is currently in the process of renegotiation.
	Kirkcaldy	Carrs Flour Mills now operating out of Kirkcaldy.
	Methil	No 1 and No 2 Docks but Forth Ports does not own No 3 Dock.
Trusts	Elie Harbour Trust	Company limited by guarantee but with charitable status.
	St Andrews Harbour Trust	Legal structure modernised since previous study.
	Tayport Harbour Trust	Company limited by guarantee but with charitable status.
	Newburgh Community Trust	Robertson Pier and the three smaller piers.
Scottish Power	Kincardine Jetty and Kincardine Town Pier	Jetty associated with the now demolished Kincardine power station.
	Longannet Jetty	In active use as a cooling jetty for Longannet power station.
Broomhall Estates	Charlestown	
	Limekilns Town Pier and Brucehaven	Leased to Forth Cruising Club but on a short lease.
Government Agencies	Kincardine Shipping Pier	Scottish Government
	Inchcolm	Historic Scotland
	Crombie Pier	Defence Storage and Distribution Agency
	Kinghorn	Scottish Water owns the pier
	Isle of May	Scottish Natural Heritage
Clubs	Dalgety Bay	
	Methil Fairway Boat Club	Owens an area around its compound, the pier and access channel.
Other Private	Rosyth	Babcock Marine
	Braefoot	The terminal is operated jointly by Shell Expro and Exxon.
	Carron (Starleyburn)	In private ownership
	West Wemyss	Wemyss Estates (or an associated company) but keen to encourage a community trust to take on the harbour.
	Methil No 3 Dock	No 3 Dock Asset Management Ltd

	Lower Largo	Crusoe Hotel
	Newport	David Anderson Marine
Other Unknown or Uncertain	Parts of Inverkeithing	Unknown
	Inchkeith	In private ownership
	St David's Bay	In private ownership
	Kinghorn	Scottish Water owns the pier but the rest of the area is unknown
	Methil	Area around No 3 Dock
	Newburgh Piers	Other piers not in the ownership of Newburgh Community Trust?

2.3 Activities at Fife Harbours

The use of Fife harbours generally falls into three categories leisure, commercial/industrial, or fishing but there are some locations that have only very limited activity.

Table 2b provides details of those locations where there is currently no leisure activity and unlikely to be potential for any.

Table 2b: Fife Harbours with No Leisure Activity and Where There is Unlikely to be Potential for Any		
Location and Type	Use	Comment
Kincardine Power Station Jetty	Disused cooling jetty	No future use planned but see Section 3.2 re potential location for a passenger service.
Longannet Power Station Jetty	Operational cooling jetty	Power station was to close by 2020 but it is now set to potentially close in 2016.
Crombie Pier	Military	Exclusion zone and landing forbidden.
Port of Rosyth – large well used industrial port	Commercial and industrial use and also cruise passenger terminal. Superfast ferry service no longer active but the freight ferry still operates.	Deep water port with access at all states of the tide. No potential for leisure use other than cruise passengers.
Braefoot Point owned by Shell Expro and Exxon	Industrial petrochemical terminal	No leisure use and leisure users must give the terminal a berth of at least 100m at all times.
Newport – old ferry station	Engines, repairs and other commercial services	No leisure use but serves leisure use customers.

Table 2c provides details of activities at those harbours where there is some leisure activity and/or where there may be potential. Only two Fife harbours currently have pontoon berths – 100 at Anstruther and 88 at Tayport but many have active sailing,

cruising or dinghy clubs. There is a long waiting list for a pontoon berth at Anstruther, with over 120 people on the list, with 35% of these local to the East Neuk, 45% from the rest of Fife and 20% from outside of Fife. Tayport has a waiting list of around 30 for its pontoon berths.

It should also be noted that the Crown Estate has around 17,000 moorings within its portfolio, 5,000 of these are in Scotland and 167 are on the Fife coast. These cost £80 for a private individual and £40 for a mooring association (usually a club). There will be more moorings along the Fife coast but it is not possible to identify these easily. As a result of the Smith Commission, in the future offshore moorings may be controlled by a different organisation.

Table 2c: Activity at Fife Harbours With Existing Leisure Use and/or Leisure Potential		
Location and Type	Use	Comment
Kincardine Shipping Pier	Old ferry pier/slip currently locked and used by a few small fishing vessels	No club, limited activity and potential.
Kincardine Town Pier	Attractive landscaped area possibly used for fishing	No vessels here and limited potential.
Culross Harbour – but a ruined structure	Since the previous study a new wooden jetty has been built.	One vessel noted here but probably limited potential.
Charlestown Harbour with east and west basins and an inner harbour area	Many vessels moor here informally as there is no charge and it is not managed.	Estimated as at least 40 vessels, perhaps more and certainly more than the 30 estimated in 2003 study. Mix of vessel types and sizes – yachts, fishing and cruising. Possibly near capacity? No club, no maintenance and in poor condition.
Limekilns Town Pier	Leisure sailing and cruising. Pier is active again with new ladders installed and vessels moored in the season.	Forth Cruising Club has only a one year lease. Club needed extra capacity for new members.
Capernaum Pier – small harbour and pier	Leisure sailing and cruising, active club mainly cruising but some racing. Sea Scouts	Forth Cruising Club has only a one year lease. Around 90 members and around 70 vessels, mainly 17–35ft and some dinghies. 2003 study reported 100 members but only 40 vessels.
North Queensferry West Harbour and Railway Pier area (large drying bay area)	Leisure cruising, with some motorboats, some fishing and boat building/repair.	Improvements likely to be instigated by NQ Community Trust once it

	Coastal rowing club.	has a 50 year lease. NQ Boat Club with 98 members but do not need to be a member to use the harbour. Around 72 vessels and now at capacity with a waiting list of 5. 30 offshore moorings leased to NQ Boat Club and 1 to an individual.
North Queensferry Town Pier	Some limited and casual use but in a poor state of repair	2 safety boats noted as moored here.
Inverkeithing Bay	Large working industrial bay with several jetties and piers. Some limited leisure activity at the mouth of the Keithing Burn Paper mill demolished since previous study. Deep water available and dredged channel to breaker's yard (RMS).	Club or association that used to belong to FYCA but no contact details available. 6-8 older smaller vessels mainly on the bank.
St David's Harbour – small partly in filled harbour	Some limited kayaking use, no ladders, etc.	History of refused planning applications for a pub or restaurant but very residential area. Limited potential for any development although casual use likely to continue.
Dalgety Bay - a bay rather than a harbour	A very active training, racing and sailing club, with a good clubhouse	About 300 active members and 100 social members. 32 club dinghies, 6 rescue boats, around 40 or so bigger vessels noted on-shore, less than the 50 or so noted in 2003. 80 offshore moorings leased from Crown Estate.
Aberdour Harbour – small harbour	Leisure harbour with sailing, power boating and leisure fishing. Active club.	Aberdour Boat Club with 35 boats moored in the harbour and another 12 on

		<p>moorings. Crown Estate indicates 30 moorings at Aberdour for club plus another 2 private.</p> <p>P/t Harbour Master</p>
Carron or Starleyburn Harbour - small harbour	Previously occupied by a boat repair/refit business but now disused.	In a poor state of repair and not currently used.
Burntisland Docks – West and East Dock	<p>Large industrial docks housing Briggs Marine, BiFab and Scott Timber, also some newer business units just at the entrance and some small business units at the railway station.</p> <p>Both docks used for industrial purposes.</p> <p>Active sailing and racing club.</p>	<p>Burntisland Sailing Club with around 30 members has a clubhouse and secure compound right at the very furthest out part of the docks and a small mooring area, again in the outer part of the docks. Now at capacity.</p> <p>Club in discussion about new and extended lease and the possibility of providing around 20 pontoon berths in a corner of the East Dock.</p>
Pettycur Bay - shallow sandy bay rather than a harbour but there is a pier structure.	Only suitable for small vessels.	Mix of small fishing and leisure vessels with user's huts. Around 14-15 vessels in total on-shore and in the water, more than the 6 mentioned in 2003 study. No club, may be a users association but no contact details.
Kinghorn Bay – a sandy bay with a pier	<p>Only suitable for small vessels. Active dinghy club. RYA Training Centre</p> <p>Some creel fishing activity?</p> <p>RNLI Lifeboat station</p>	<p>18-20 small vessels in dinghy park, compared to 10 in the previous audit. Around 50 club members, use Kinghorn Loch as well.</p> <p>A free harbour with no berthing or mooring charges.</p>
Kirkcaldy Docks – working docks with inner and outer basins	<p>Carrs Flour Mills Ltd - £17m investment making it the most modern flour mill in Europe.</p> <p>Docks dredged, improved and brought back into use</p>	Docks transformed since previous study – housing development complete and industrial use reinstated whereas it was hardly used and not maintained before.

	<p>2011 through a package of assistance</p> <p>Kirkcaldy Boating and Sea Angling Club</p>	<p>Around 50 club members with vessels and another 25 social members. Mix of sizes and types of club vessels in a secure compound.</p>
<p>Dysart – small harbour with inner and outer basins</p>	<p>Dysart Sailing Club is an active leisure and fishing club but balance has changed since the previous study from 50/50 to only around 20%-30% being fishing although there is still some creel fishing.</p>	<p>More capacity has been made available through the dredging of the inner harbour. Harbour gates and bridge now removed.</p> <p>Shale removal from entrance required each spring.</p> <p>Much busier than in previous study - 132 members but not all active. Around 50 boats on shore and another 20 or so in the water, at capacity now with a waiting list.</p>
<p>West Wemyss – small harbour with only outer harbour remaining and inner basin in filled</p>	<p>West Wemyss Boat Club mainly sailing and leisure fishing but 2 licensed fishing boats – small craft</p>	<p>Generally around 40-50 members/boats and now pretty much at capacity – 35 reported in 2003 study.</p>
<p>Methil – large working docks</p>	<p>No 1 Dock commercial use, aggregates, etc</p> <p>No 2 Dock commercial use, Donaldson's Timber</p> <p>No 3 Dock virtually unused – some use by Sea Cadets?</p> <p>Methil Fairway Boat Club – big club 169 members but not all active, around 100 vessels - sailing, fishing and motor boats and with some commercial fishing</p> <p>Deep water port accessible at all states of the tide although No 3 Dock gates are closed.</p>	<p>The area around No 3 Dock is transformed since the previous study – now Fife Energy Park, Fife College, nursery, bakery and other commercial uses.</p> <p>Technical study of No 3 Dock indicates the gates are currently jammed shut. Discussion with the owner's representative casts doubt about the current state of repair of No 3 Dock.</p>
<p>Lower Largo – small harbour</p>	<p>No activity at harbour now as in poor state of repair.</p>	<p>Previously a club with 18-20 moorings.</p>

	Active dinghy racing club operates out of clubhouse at beach. The club website indicates it offers some of the best dinghy sailing in Scotland.	Largo Bay Sailing Club has around 50 members but 22 are family memberships. Hold at least one open regatta a year and will hold 2016 UK National Championships.
Elie Harbour – large sandy bay with pier	Active leisure harbour with club, clubhouse and commercial watersports provider. RYA Training Centre. Watersports building is an addition since the last study?	Elie and Earlsferry Sailing Club – yachts, dinghies and power boats. Significantly fewer vessels on hard standing than in 2003 – only 6 as opposed to 25 previously. 3 Crown Estate moorings let to Elie Harbour Trust. P/t Harbour Master.
St Monans – traditional fishing harbour with east and west basins	Millers boat builders now gone, but large slip remains. Mix of creel fishing (lobsters and crabs) and leisure activity but much busier than in previous study.	No club but a harbour users group in place. Usually 30-35 vessels with around 2/3 leisure and the rest fishing. Around 34 vessels noted when visited compared to only 15 during the previous study. P/t Harbour Master Requires maintenance dredging and seaweed clearance following easterly storms.
Pittenweem – main working fishing harbour with inner and outer basin – outer basin dries	The focus for commercial fishing activity, with around 30 or more boats using it regularly with combined annual sales of around £3.5m. Similar number of users to previous study. 39 vessels listed by FMA as using Pittenweem Harbour.	Leisure use is limited to Pittenweem Arts Festival, the occasional large or single keeled vessel and a recently established rowing club. Requires maintenance dredging to retain its deep water access. F/t Harbour Master cover
Anstruther Wester - pier	The main use of the pier is as a small car park.	At the mouth of the Dreel Burn – not suitable for sailing use. Stepping stones link it to

		Anstruther – well used by locals and a novelty for visitors.
Anstruther – large ex fishing harbour with inner and outer basins	<p>Mainly leisure sailing but with some limited fishing – 100 secure, serviced pontoon berths and over 50 wall side berths.</p> <p>Isle of May service and the historic Reaper vessel berth in the harbour.</p> <p>RNLI Lifeboat station</p> <p>Coastal Rowing club</p>	<p>Sailing club.</p> <p>100 berths noted in previous study but now pretty much at capacity.</p> <p>Waiting list of over 120 – 7 years to get a pontoon!</p> <p>A drying harbour that requires maintenance dredging.</p> <p>Very good supporting infrastructure and scope for economic impact.</p> <p>F/t Harbour Master</p>
Cellardyke – small traditional fishing harbour	Very limited use – typically 3-6 small leisure vessels in the summer	<p>No vessels evident when visited but a few canoes seen on a trailer – East Neuk Outdoors?</p> <p>Very narrow entrance and shallow, poor road access and no facilities.</p> <p>Requires seaweed clearance following easterly storms.</p> <p>Supervised by Anstruther Harbour Master.</p>
Crail – traditional small fishing harbour	<p>Mix of fishing and leisure 20 - 25 vessels and 50/50 split but limited capacity.</p> <p>Coastal rowing club</p>	<p>Small and fairly cramped with limited space around the harbour.</p> <p>Requires occasional maintenance dredging.</p> <p>P/t Harbour Master</p>
St Andrews – traditional working harbour	<p>Fishing and leisure – around 40 vessels 12 of which are commercial fishing.</p> <p>St Andrews Sailing Club is active at the beach – RYA</p>	<p>Busier than at time of previous study when around 30 vessels were using it. Project to install 20 - 30 pontoons on the wall of the inner harbour should proceed this</p>

	Training Centre with 100 members, clubhouse and secure compound	summer. No waiting list and probably at 85% capacity. P/t Harbour Master.
Tayport – small harbour	All leisure sailing and cruising – 98 vessels, mostly on pontoons. Lack of supporting facilities.	Pontoons replaced since the time of the previous study. This has not increased capacity but as they have ramps rather than ladders, access is better. Waiting list of around 30 and have plans to increase capacity. Tay Corinthian Boating Club - sailing Club with many common members with the Trust. Requires maintenance dredging.
Wormit – small harbour and pier	Active dinghy and sailing club - Wormit Boating Club – sail between road and rail bridges generally, racing and cruising, with a small number of keel boats.	Slightly fewer larger vessels out of the water than at the time of the previous study but more smaller ones. 20 Crown Estate moorings.
Newburgh – 4 stone jetties	Some (10-12) small fishing type row boats, some look disused/derelict Newburgh Sailing Club – RYA Training Centre Maid of the Tay and Sea Eagle providing passenger trips?	Active dinghy club at nearby grassy beach 1 private Crown Estate mooring
Inchkeith	Activity unknown. Island contains many ruins – buildings, military, etc and many hazards.	Scheduled site status affords legal protection under the Ancient Monuments and Archaeological Areas Act 1979. The site was rescheduled in 2002, extending the scheduled area to include the whole island and an area offshore, including any associated

		archaeology.
Inchcolm Island	Leisure visits to Inchcolm Abbey operated by Historic Scotland See Section 3.2 for more detail of passenger services.	180 visitors arriving by small craft in 2014 far fewer than the 800 reported in 2003.
Isle of May	Leisure and wildlife – NNR very important for seabirds. New small visitor centre opened in 2014. See Section 3.2 for more detail of passenger services.	387 vessel landings in 2014 but that includes the regular passenger services. Only a few small vessels but 40 kayaks. One cruise ship booked for 2015. Overall visitor numbers have doubled to over 10,000 since 2003

2.4 Physical Condition of Fife Harbours

As indicated at Section 1.4, this is not a technical study and any statements about the physical condition of any harbours are purely visual unless there is an existing technical study as a reference point. However, it is clear even to a non-technical person that several harbours are in need attention and these are outlined in Table 2d

Table 2d: Fife Harbours in Need of Repairs/Works			
Location and Owner	Issue	Listing	Estimated Costs – if known
Charlestown Broomhall Estates	Whole harbour is in a poor state of repair and has been for many years. Arch Henderson Report 1996 indicated that “ <i>extensive</i> ” repairs are required.	B-listed	Several millions of pounds
Limekilns Town Pier Broomhall Estates	Seaward end of pier requires works	Not listed	No available estimate
North Queensferry Fife Council	Railway Pier requires work	B-listed and on the At Risk Register	No available estimate
	Town Pier requires work	A-listed	£400,000
Dysart Fife Council but long lease to sailing club	Was to be part of Dysart Townscape Heritage Initiative which proposed full restoration which	B-listed	Estimated as £6m for East Pierhead reconstruction and other works would be additional. However, reports

	would be very expensive. This project did not proceed.		and costs are now somewhat out of date. The cost of routine works to ensure the harbour is safe and useable are likely to be far less
West Wemyss Wemyss Estates	Harbours walls in poor condition	C-listed	No available estimate
Lower Largo Crusoe Hotel	Pier is blocked off and apparently collapsing into the sea. Apparently further deterioration could potentially block the harbour entrance	Not listed	£10,000 - £15,000 according to the owner but this seems light?
Newburgh Newburgh Community Trust and possibly others?	Piers are in poor condition and crumbling	Not listed	No available estimate

2.5 Charges at Fife Harbours

Table 2e provides an indication of current berthing costs at Fife harbours and it also compares these to the fees levied at selected local and East coast harbours. As well as berthing fees, most harbours/clubs will make a charge for visiting vessels to enter the harbour and to berth, for cranes to lift vessels in and out of the water, and some will make a charge for electricity.

From Table 2e it can be seen that berthing charges in Fife are fairly modest and in general terms reflect the relatively poor supporting infrastructure that is available. The berthing rates levied by St Andrews Harbour Trust and Tayport Harbour Trust are relatively high compared to other Fife harbours but are probably a more realistic reflection of what requires to be raised to ensure a good maintenance regime can be implemented

Fife Council rates are also quite modest, especially when the various concessions are factored in. It is suggested that Fife Council could/should consider increasing its charges gradually over the next few years and possibly also introducing a simplified system. It may also wish to re-examine the various concessions offered for smaller vessels and at some locations.

Comparators for the pontoon berths at Anstruther and Tayport are Eyemouth, Arbroath, Peterhead, Banff and Whitehills which are all more expensive although may offer more on-shore facilities than Anstruther. Fife offers very attractive berthing rates when compared to Port Edgar on the other side of the Forth which is very expensive.

As was found in the previous study, there is a desire at some clubs/harbours to keep charges affordable to encourage and retain members and also to reflect the relative lack

of facilities for instance at North Queensferry, Dysart, West Wemyss. There have been a few comments made about “*economic migrants*” moving to Fife from other places locally, particularly Port Edgar, because charges in Fife are significantly cheaper.

Port Edgar, on the south side of the Forth, was previously operated by Edinburgh Leisure but since April 2014 has been owned and operated privately by Port Edgar Marina Limited. It provides 300 berths, plus toilets, showers, lockers, fuel, boat storage etc.

Granton, also on the south side of the Forth, accommodates two clubs, Forth Corinthian Yacht Club and Royal Forth Yacht Club. Note there are proposals for a complete re-development of Granton including housing, leisure, hotel, shopping and a 400 berth marina.

Table 2e: Charges at Fife Harbours and at Selected Comparator Harbours			
Harbour	Berthing Charge – annual unless otherwise stated	Storage or Winter Charge – if applicable/known	Other Comment
Charlestown	No charge for informal mooring		Not managed, opportunistic
Limekilns	£125 a year		Plus membership of £55
North Queensferry (FC rates)	Vessels under 8m – 50% of normal rate i.e. £24.04 - £26.21 per m. Others £40.26 - £44.85 per m, with vessels under 6m being £146.30	50% of annual rate	Reduction of 25% for club members in recognition of the management activities undertaken. Adult club membership is £65.
Dalgety Bay			Sailing Club membership £172
Aberdour	£2.45 per ft or approx £7.35 per m	£2.45 per ft for pier storage	Plus sailing club membership
Pettycur	Charge for sheds but no charge for informal mooring		No sailing club
Burntisland	£7.30 per ft or approx £22 per m		Sailing Club membership £79
Kirkcaldy	£5 per ft or approx £15 per metre		Payable to angling club plus £20 joining fee
Dysart	£2 per ft or around £6 per m		£100 joining fee and annual adult membership is £52
West Wemyss	£150 yr 1 and £100 thereafter regardless of size		
Methil	£220 - £230 flat		

	charge		
Elie	£10 per ft or approx £30 per m up to 20ft. Over 20ft £15 per ft or £45 per m.	£6 per ft or approx £18 per m	
St Monans (FC rates)	Vessels under 8m – 50% of normal rate i.e. £24.04 - £26.21 per m. Others £40.26 - £44.85 per m, with vessels under 6m being £146.30	50% of annual rate	No sailing club
Anstruther Pontoon Berths (FC rates)	£60.39 - £78.65 per m annually depending on size. Vessels under 6m £438.90 per yr.	50% of annual rate for wintering on pontoons only	
Anstruther Pierside Berths (FC rates)	£40.26 - £52.43 per m depending on size. Vessels under 6m £292.60 per yr	50% of annual rate	
Cellardyke (FC rates)	Vessels under 8m – 50% of normal rate i.e. £24.04 - £26.21 per m. Others £40.26 - £44.85 per m, with vessels under 6m being £146.30	N/A	No sailing club
Crail (FC rates)	Vessels under 8m – 50% of normal rate i.e. £24.04 - £26.21 per m. Others £40.26 - £44.85 per m, with vessels under 6m being £146.30	50% of annual rate	No sailing club
St Andrews	£21.44 per ft inner and £30.62 per ft for inner and outer harbour or approx £64 - £92 per m		No club at harbour
Tayport	£47 per m for members and £78 for associates/visitors		
Wormit (FC rates)	Vessels under 8m – 50% of normal rate i.e. £24.04 - £26.21 per m. Others £40.26 - £44.85 per m, with vessels under 6m	50% of annual rate	Reduction of 25% for club members in recognition of the management activities undertaken.

	being £146.30		Wormit also gets a further 25% reduction to reflect the lesser standard of facilities. Club also makes a charge of £80 for keel boats?
Berth Rates Elsewhere on the East Coast			
Granton	£13.50 - £16.50 per ft – approx £41 - £50 per m	£13.50 per ft or approx £41 per m	Club Membership is additional
Port Edgar	£184 - £245 per m	£90 per m	
North Berwick	£45 per m – all year charge		
Eyemouth	For all vessels up to 10m Wall £47.19 per m Un-serviced pontoon £63.54 per m Serviced pontoon £107.90 per m	Wall £20.24 per m Un-serviced pontoon £26.96 per m Serviced pontoon £53.92 per m	34 pontoon berths and 10+ for visiting vessels
Arbroath	£87 per m	£40 per m	53 pontoon berths and 6 visitor berths
Peterhead Bay Marina	£98.40 per m annual charge		Over 150 pontoon berths
Banff Marina	Up to 6m £612.67 and then £97.04 per m	Annual charge up to 6m £816.88 and then £129 per m	76 fully serviced pontoon berths
Other Aberdeenshire Harbours – Gourdon, Johnshaven, Portsoy and Rosehearty	Up to 6m flat rate of £110.84 and then £19.35 per m	Annual charge up to 6m £113.48 and then £19.81 per m	
Whitehills Marina Moray Firth	£120 per m annual rate		40 serviced and 7 un-serviced pontoon berths

2.6 Supporting Infrastructure at Fife Harbours

Ease of access and the availability of parking and toilets are important aspects for harbour users but in broad terms many Fife harbours are deficient in this basic supporting infrastructure.

Many harbours are well signed from the main road, and some have brown “*historic harbour*” signs including Pittenweem and St Andrews. However, many of Fife’s harbours are not that easy to access by road and this is a symptom of where and why they were originally developed. Harbours are often down steep and/or narrow residential roads that are dead-ends and have limited room for parking and manoeuvring e.g. Crail, Cellardyke and Lower Largo. These access and parking difficulties might dissuade dry tourism visitors i.e. those that are not going to participate in water-based activity but that are interested in just enjoying the spectacle of harbour activity. This has certainly been identified as an issue in St Monans and one which the local regeneration group is seeking to tackle.

Another issue that is apparent at several locations including Pettycur, Kinghorn, Crail and Lower Largo was the number of parked vessels in parking spaces. However, it is assumed that these will be in the water in the summer and hence will not contribute to parking difficulties.

Linked to access difficulties is the fact that many of the harbours are also beach destinations e.g. Aberdour, Pettycur Bay, Kinghorn, Lower Largo and Elie. These must be very busy in the summer but the solution seems to be the liberal use of double yellow lines to prevent inappropriate parking. Whilst it is appreciated that it might be difficult, perhaps there is a need to look at improving parking arrangements at some of these busy beach locations – after all if beach users cannot park they are not going to stay and might not come back again!

Some Fife harbours have good or very good access to trains including Aberdour, Burntisland, and Kinghorn. Others are accessible by train but a good walk away e.g. North Queensferry, Dalgety Bay and Kirkcaldy.

Quite a number of Fife harbours have public toilets which are open all year including at Culross, Dysart, Pettycur, Pittenweem, Anstruther, Lower Largo and Tayport and there is seasonal provision at Kinghorn, Elie and St Andrews. Other locations have toilets in their clubhouses available for members and their visitors but not the general public. Some locations have no toilets at or near the harbour including Kincardine, West Wemyss and Newburgh. No Fife harbours provide a chemical toilet waste disposal point and even those which have all year round toilets are not generally open in the evenings when harbour users might require them. Anstruther is the only location where there are public showers available for harbour users and also a toilet that can be accessed by means of a code when the public toilets at the harbour are closed.

The lack of storage facilities for commercial harbour users at Pittenweem, St Monans, Crail, and St Andrews is a recognised shortcoming and can result in these working harbours being considered as “*untidy*”.

The audit of harbours noted whether visitor information was available by way of signs and/or information boards. In general terms visitor information provision was good although was lacking in some locations such as Pittenweem. In some locations e.g. Culross and Lower Largo there were several information boards in close proximity, all from slightly different eras. Provision was particularly good for the Fife Coastal Path, with a wealth of signs and information boards.

Another aspect that was noted during the audit was the provision of life belts. Most locations have at least some provision but none were obvious at Charlestown and many were missing within the dock area of Burntisland. There are RNLI lifeboat stations at Kinghorn and Anstruther. There was a suggestion that a third Fife lifeboat station was required at St Andrews as this is a busy leisure area but lifeboats can take some time to arrive from Anstruther and Broughty Ferry (on the Tay) due to sea conditions.

Quite a number of comments were made during the course of the study about the rising expectations of sailing users once they have experienced good marina type facilities if they have travelled elsewhere or are coming from elsewhere.

The desirability of every active harbour providing easy access via a small ramped floating pontoon station was mentioned by one consultee as it would provide much safer and easier access than down ladders. Accessibility might become increasingly important as the sailing community tends to be older and certainly several clubs mentioned the ageing profile of their memberships as an issue.

Table 2f: Supporting Infrastructure at Fife Harbours	
Kincardine	No public toilets in Kincardine but good well signed parking for Coastal Path users. Good Coastal Path info and signs.
Culross	Good large car park, lots of info boards and toilets that are open all year – well supplied and clean with no charge.
Limekilns	Good parking at Town Pier. Well signed Comfort Scheme toilets at Ship Inn. Good Coastal Path info. On and off street parking by the Forth Cruising Club.
North Queensferry	Good parking and superloo at Battery Road car park. Several types of info boards at various locations. No public toilets at the harbour.
Dalgety Bay	Parking and clubhouse within the Club's grounds but not available to the general public.
Aberdour	Located down narrow residential streets. Some limited parking within the harbour for harbour users. Limited on street parking and lots of double yellow lines. Disused public toilets at the harbour that are an eyesore – due for demolition?
Burntisland	Plenty of parking on rough ground within the dock area. No public toilets at the harbour and those at Links Place now seasonal only. Club has good parking and toilets/showers within its clubhouse.
Pettycur	Good large car park and superloo, assume for beach users rather than harbour users specifically. Vessels parked in car parking spaces. The harbour is down residential streets and there are lots of double yellow lines.
Kinghorn	Small car park close to the harbour just under the railway bridge but almost full with classic cars (local garage?). Very limited parking on the sea front, down a dead-end and narrow streets. On street parking close by. Seasonal toilets on the front under the Fife Coast and Countryside Trust Coastal Station.
Kirkcaldy	Residents Permit parking only around the harbour area. Harbour not particularly accessible or welcoming to walkers.

Dysart	Large car park close to the harbour. Award winning public toilets within the Harbourmaster's House, open all year and no charge. Good information provision.
West Wemyss	Good small car park, good info about the history of the harbour. Accessibility by road is good but no toilets.
Methil	Parking available on rough ground near boat club.
Lower Largo	Very narrow residential streets and lots of double yellow lines, on a busy day it would be very challenging. Some limited parking in car parks including on the beach front which has lots of info boards. Toilets located here and are open all year. Lots of boats parked in this car park.
Elie	Down residential streets with lots of double yellow lines but not as narrow as some other places. Paid for parking within the harbour and good info. Award winning toilets operated by Fife Coast and Countryside Trust which are seasonal.
St Monans	Down narrow residential streets, on street parking only. Not a dead-end but looks as if it is. Traffic/parking is a big issue according to the local regeneration group and is a disincentive to visit St Monans Harbour. Public toilets located up the hill from the harbour but " <i>never open</i> ".
Pittenweem	Well signed but again down narrow residential streets, not as bad as some other locations as fishmarket lorries need access. Parking on the harbour front is signed as reserved for fishermen. Lots of on street parking and a good parking area just after the harbour. Good toilets under the Harbour Master's office which are open all year and free.
Anstruther	Access by road is better than at many others. Lots of on street parking and 2 car parks on the front with a seasonal charge. All year round but charged for toilets and showers within the Harbour Master's building. A separate night toilet is available for harbour users after the public toilets are closed and is accessed via a key code. Previously a staffed seasonal VIC operated in Anstruther but has been discontinued, visitor info available at Fisheries Museum and through the newly introduced interactive digital kiosk information points that are being rolled out in Fife.
Cellardyke	Road access is tortuous, extremely narrow residential streets and steep hill. Very dirty info board about the harbour.
Crail	Limited parking at harbour and restricted to harbour users. There are toilets at the harbour but they were closed with no indication of when they are open. Other toilets on the main road.
St Andrews	Down narrow streets with lots of parked cars. Mainly on street parking at the harbour, quite a lot of it but often very busy. Public toilets seasonal only, close early and quite poor. The café owner indicates that she has assumed responsibility for closing the toilets in the summer. She does not get paid to do this but does it to ensure they are kept open later for users. Some old style St Andrews info boards at the harbour.
Tayport	Reasonable access down the main shopping street, with a

	small car park at the south of the harbour. Toilets are located here as well, open all year, clean, free and well supplied but not open long enough for harbour users.
Wormit	Harbour located just off the main road although down a steep hill. Limited on site parking and Boat Club clubhouse with toilets/showers for members.
Newburgh	Waterfront area not signed and down residential streets. Limited on street parking at the waterfront area. Sailing Club clubhouse for members use. No public toilets in Newburgh.

2.7 Commercial Activity at Fife Harbours

Table 2g provides details of those locations where there is some element of commercial activity at or very close to the harbour. This might be fishing, harbour related activity, catering, retail etc but does not include industrial use.

Commercial activity and hence the scope for economic spin off from Fife's harbours is generally fairly limited. Elie is probably the most business-like in the approach that has been adopted. There is a modest parking charge levied during the summer, the clubhouse sells take-away food from a kiosk and Elie Watersports operates out of a building within the harbour area.

There is a chandlery located in Upper Largo but it is not associated with a harbour.

As far as can be ascertained there are no charter hire vessels available in Fife but this could represent a market opportunity.

Table 2g: Commercial Activity at or Close to Fife Harbours	
Rosyth	Cruise Passenger Terminal
North Queensferry	Seafari RHIBs stored in a compound close to the Town Pier – just be a store as they do not generally operate out of North Queensferry.
Kinghorn	Beachfront take-away - assume seasonal only operation.
Dysart	Harbourmaster's House café and interpretation centre (free entry).
Methil	10 commercial fishing vessels.
West Wemyss	2 licensed fishing boats
Lower Largo	Crusoe Hotel adjacent to the pier, general shop very close by.
Elie	Seasonal Elie Watersports, catering kiosk, and parking charge.
St Monans	The Smokehouse outlet and café is located within the harbour and Craig Miller's Restaurant is close by. Local heritage group operates out of a building on the front but as this is up for sale, it needs a new home. Some commercial fishing activity.
Pittenweem	30-40 commercial fishing vessels regularly operate out of Pittenweem. Fishmarket and FMA chandlery. A pub and an ice cream shop near the harbour.
Anstruther	Parking is charged for seasonally and this accrues to Fife Council harbour income at Anstruther. Toilets are charged for all year but this is not part of the harbour's income. Isle of May trips, Scottish Fisheries Museum and a good range of shops and food outlets.

Crail	Some commercial fishing activity. Gallery and café close to the harbour.
St Andrews	Some commercial fishing activity. Long established café in a portacabin at the harbour, with a very good recent review in the Courier. Catering kiosk operates out of the Sailing Club building.
Tayport	Harbour Café (community venture) and Bell Rock pub close to harbour.
Newport	David Anderson Marine – engine and boat services.
Newburgh	Maid of the Tay moored here but web searches indicate it is up for sale.

2.8 Clubhouses at Fife Harbours

Table 2h provides details of those locations that have reasonable clubhouse facilities. It does not include those locations that have only very basic facilities or are operating out of portacabin type buildings.

Those locations where dinghy sailing is most prevalent are most likely to have a clubhouse as their members get wet and need hot showers/good changing facilities etc.

There was a club building at North Queensferry but it was storm damaged and demolished so the club is operating out of a container. The club building at Dysart was subject to an arson attack and is not useable but the Sailing Club is currently trying to secure funding to redevelop it.

Table 2g: Location with Clubhouses		
Location	Club	Comments
Limekilns Brucehaven	Forth Cruising Club	Clubhouse leased from Broomhall Estates. Lounge, kitchen and bar area. Ladies and gents toilets and showers. Ladies just refurbished and now the “ <i>best on the Forth</i> ”. Access by key code meaning visitors can use.
Dalgety Bay	Dalgety Bay Sailing Club	Large clubhouse building with lounge, bar, catering, showers, toilets, etc. Available for functions and Club looking at ways of servicing Coastal Path users, etc.
Aberdour	Aberdour Boat Club	Small clubhouse building with toilets and showers.
Burttisland	Burttisland Sailing Club	Modern clubhouse (1984) at the very far end of the docks, partly funded by Sports Council. Lounge, kitchen, toilets and showers. Accessed by key code. Club owns the building but the land is leased from Forth Ports.
Kinghorn	Kinghorn Sailing Club	Beachfront clubhouse building.
Lower Largo	Largo Bay Sailing Club	Clubhouse is not at the harbour/pier but near the beach.

Elie	Elie and Earlsferry Sailing Club	Very good modern clubhouse with lounge, catering, toilets and showers. Take-away food service out of the clubhouse
St Andrews	St Andrews Sailing Club	Building is not directly associated with the harbour and is owned by the Sailing Club. Has toilets and showers but in need of upgrading. Catering outlet on ground floor but run by an operator not the club.
Wormit	Wormit Boat Club	Assume must have sought permission from Fife Council to build this small clubhouse. Limited facilities kitchen, toilets and showers.
Newburgh	Newburgh Sailing Club	Similar set up to Wormit with limited but probably adequate facilities although does not look in a great state of repair externally.

2.9 Visitors at Fife Harbours

Despite several harbours in Fife reserving/retaining visitor berths, it is clear from the research that Fife is attracting only modest numbers of visiting vessels and Table 2i provides details that suggests there are currently around 412 visiting vessels a year. Only Anstruther and Aberdour provided data on visitor nights but assuming vessels at all places only stayed one night would mean there were approximately 579 visiting vessel nights in Fife annually.

The numbers of visiting vessels are higher than reported in the previous study but are still fairly modest. The numbers at Anstruther are particularly disappointing given it reserves 8 berths and offers good supporting infrastructure (at least in the Fife context). Few locations appear to keep formal records of visiting vessels.

Fife Council previously offered a fourteen day Rover Ticket to encourage visiting vessels to its harbours but uptake was poor.

Largo Bay Sailing Club indicates that its open regattas attract participants from all over Scotland and as these are weekend events many will stay over night. The UK National Championships is a week long event, so again participants will camp or stay in local accommodation.

Table 2i: Visiting Vessels at Fife Harbours		
Location	No of Visiting Vessels Annually 2003 study	No of Visiting Vessels Annually 2015 study
Limeklins, Brucehaven	Not known	About 20 a year from the East Coast and maybe the same again from the Forth
North Queensferry	Not known	A few (5-20 a year) including occasional from Denmark and Holland

Aberdour	100	113 vessels mostly local to the Forth and around 120 visitor nights on average each year. Lots of day visitors.
Burntisland	Not known	A few – round Britain, from Europe, Sail Training and occasional bad weather refuge.
Kirkcaldy	None	2 in past 10 years
Dysart	28	10-12 a year mostly local to the Forth, inc Dunbar.
West Wemyss	A few	A handful each year
Methil	Coastguard will direct vessels into Methil in bad weather	10-15 annually
Lower Largo	A few	None now?
Elie	12-24	?
St Monans	Not known	1 regular boat every year
Pittenweem	Not known	Up 20 a year, often at the time of the Anstruther Muster or Pittenweem Arts Festival – at the weekend when less busy with commercial vessels. Some round Britain trips and from Holland and Denmark – usually single fin vessels.
Anstruther	150	On average 179 vessels annually over last 3 years on pontoons and wall side berths, many stay 2 nights and are often associated with the Muster
Crail	Not known	A handful – maybe around 5 or so
St Andrews	A few	A handful each year but some from Scandinavia and Holland
Tayport	10 -12	10 -12

2.10 Events at Fife Harbours

Many clubs hold regattas and racing events and some of the dinghy clubs hold events that can attract participants from outside of Fife. However, there are really only two major events – the East Coast Sailing Festival and the Anstruther Harbour Festival.

The East Coast Sailing Festival comes to the Forth every two years and generally attracts around 60 vessels locally and from the North of England. It was previously a

week long event but has been compressed to a long weekend. The organisers (FYCA when it is on the Forth) are keen to develop this festival to provide added interest for spectators and to attract more and different types of participants.

The Anstruther Harbour Festival is a community event and incorporates the “*Anster Muster*” organised by Anstruther Sailing Club which is understood to attract up to 100 vessels for the weekend from around the Forth and from further afield. Again the organisers are keen to develop this festival to provide added interest and it now includes the East of Scotland Boat Jumble and Classic Boat Rally, a coastal rowing regatta and the Scottish Fisheries Museum Open Day and Anstruther Lifeboat Open Day. The organisers consider that this event has good potential to attract more visitors to Anstruther and are keen to incorporate aspects such as music and to emulate the Portsoy Traditional Boat Festival. It is understood that there have been some issues with the local capacity to deliver and develop this festival. Fife Council’s Festival’s Development Officer has been working with the organisers for three years and whilst she considers it has good potential, she also considers that it needs professional support if it is to develop to the scale and quality of Portsoy.

It is also worth mentioning the Pittenweem Arts Festival and the Crail Food Festival, as whilst both use venues around the villages, their harbours are a focal point for both festivals. The Pittenweem Arts Festival is a very well established event held over ten days in August each year. It utilises the area and buildings around Pittenweem Harbour and attracts around 25,000 visitors. The Crail Food Festival holds one of its signature events at the harbour and promotes locally caught seafood. This festival attracts around 2,000 people and has secured Event Scotland funding. There are many other community events in Fife that make some use of local harbours.

SailScotland publicises events on its website although tries not to duplicate the VisitScotland website and does not include local racing or regattas. As well as waterborne events, it will feature events that might draw a boat based audience e.g. music or wildlife festivals and/or spectator boat events. Neither the East Coast Sailing Festival or Anstruther Harbour Festival are featured on the *SailScotland* website but they could be if organisers alerted *SailScotland* and there is no charge for inclusion. FYCA has been alerted.

A brief discussion has been held with *EventScotland* to discuss the scope for hosting events on the Forth and Tay. Although it would appear that nothing is firmly planned, there may be the possibility of attracting the Tall Ships Race to Dundee around the time of the opening of the V&A.

Section 3.5 highlights the potential to attract the St Ayles Skiff World Championships (coastal rowing) to Fife. The 2014 Forth Bridge Flotilla to celebrate the Road Bridge’s 50th Birthday was apparently very successful and several people have suggested that this could perhaps be developed into an annual event. Others have mentioned the success of the Portsoy Traditional Boat Festival and suggested that something similar might be developed in Fife, particularly given the presence of the Scottish Fisheries Museum. Some others have suggested the potential to attract power boat racing to the Forth. Many considered that the potential offered by the Forth as a venue to host events was not well recognised and much more could be done.

Events with the potential to attract visitors to Fife could seek funding from Fife Council Strategic Investment Fund, and those focused on community elements can seek funding from the Community Events Fund. Larger scale events that seek to attract an audience from outwith the local area could potentially seek financial support from *EventScotland* but must be seeking at least 1,000 participants/spectators.

All clubs and others organising events are obliged to notify Forth Ports Ltd, as the Statutory Port Authority, to ensure that events can be held safely from the point of view of both leisure and commercial users.

2.11 Income and Expenditure at Fife Harbours

As the owner of many harbours in Fife, Fife Council has provided a wealth of information about its own harbours in terms of income and expenditure at each harbour, use/users, state of repair, recent repairs, costed capital works, arrangements with clubs, etc. Income and expenditure over the past five years at Fife Council's 11 harbours has been analysed and the following points are worth noting.

- Over the past five years Fife Council has spent just over £2m on its own harbours or on average around £411,000 each year. In the previous study this figure was stated as around £380,000 so in real terms Fife Council's spending on its harbours has remained much the same or possibly decreased a little but given budgetary constraints this is not unexpected.
- Over the past five years Fife Council has received income of just over £1.1m from activity associated with its own harbours or on average around £222,000 each year.
- Thus Fife Council has incurred a net spend of around £947,000 on its harbours over the past five years or around £189,500 each year.
- Pittenweem and Anstruther account for the majority of income (79%) and also for the majority of expenditure (67%).
- Over the five year period, all harbours incurred a net deficit, although Anstruther generated a reasonable surplus in two years and North Queensferry generated a surplus in three years out of the five years.
- The ice plant operation at Pittenweem generates a surplus every year.
- North Queensferry is the most financially sustainable operation, exhibiting the smallest average deficit, with Pittenweem exhibiting the highest average deficit.
- Some harbours generate no or almost no income for Fife Council including Aberdour, Anstruther West, Cellardyke and Pettycur.
- Comparing the main leisure harbour at Anstruther, with the main fishing harbour at Pittenweem shows that on average Pittenweem is generating only around £15,800 more each year than Anstruther but Pittenweem is costing on average

around £61,000 more to operate each year. This does not include the ice plant figures which would reduce the deficit at Pittenweem. However, Pittenweem is estimated to generate £3.5m of sales each year and provides a number of fishing related jobs.

It has not been possible or appropriate to seek this same level of detail from other owners, clubs or users but income is usually associated with berthing fees and generally ranges from around £5,000 to around £20,000, with only four owners/clubs reporting higher figures – Forth Cruising Club, Dalgety Bay Sailing Club, Elie Harbour Trust and Tayport Harbour Trust. Virtually every owner and club reported that they needed to spend almost all of their income on keeping the club and harbour operational. Tayport is the only harbour that we are aware of that has taken a loan to enable it to undertake developments. St Andrews Harbour Trust appears to be quite successful in securing grant funding.

2.12 Projects and Proposals at Fife Harbours

Fife Council's routine expenditure plan for harbours in 2015/16 indicates that around £182,000 will be spent. In addition, major remedial works are scheduled for the Pittenweem breakwater this year costing in the region of £1m.

Fife Council plans to dredge Pittenweem, Anstruther and St Monans in the near future. It is also known that Tayport Harbour Trust and Dysart Sailing Club have plans to dredge their harbours. The Forth Estuary Forum recognises that many harbours on the Forth need to dredge regularly and is considering convening a conference to discuss dredging and to ascertain if there is any scope for collaboration to reduce the cost to individual owners, etc. This seems like a very sensible and useful idea and should be supported. The owners/users currently planning or considering dredging have been alerted about this conference.

Whilst many harbours will benefit from ongoing and routine maintenance, there are potentially significant projects being developed and pursued at five harbours as follows:

North Queensferry

Fife Council has been successful in securing £754,439 from the Big Lottery's Coastal Communities Fund. The money will be used to install a pontoon and associated access walkway and to carry out a number of environmental improvements in the vicinity of the Town Pier in North Queensferry. The funding will also provide six digital tourism kiosks for coastal communities in Fife, one of which will be installed at the railway station in North Queensferry. The pontoon will provide an "*all states of tide*" landing facility in the harbour for existing passenger services (see section 3.2) on the Forth and also to open the village to cruise ship passengers on pre-booked excursions (see section 3.4).

The North Queensferry Community Trust has recently secured a long lease from Fife Council for the West Bay/harbour area and has developed an associated business plan laying out their key aims and objectives for the area.

Burntisland

Burntisland Sailing Club is currently working on a business development plan which will include formalising the legal entity of the club (probably a limited company with

charitable status), increasing berthing capacity so that membership can be expanded, improving its clubhouse to provide full disabled access, expanding the on-shore storage and seeking to more actively attract visitors and possibly providing on-shore facilities for visitors. The pontoon berths (up to 20) would be accommodated in a corner of the East Dock and the estimated cost is around £125,000. The estimated cost of delivering the full project is in the region of £175,000 - £200,000. This project will be subject to securing a new lease with Forth Ports and its agreement to the provision of the pontoon berths but it is understood that negotiations are relatively positive. Funding will also need to be secured to enable the project to proceed. As a deep water port, this project could prove beneficial in attracting more visiting vessels to the Forth, although the clubhouse location is at a distance from the main shopping street in Burntisland.

St Monans

St Monans Development Trust has secured Axis 4 funding to commission a master plan and technical study of the area around the harbour. Whilst this is focussed on the harbour as an asset and a draw for visitors, the study is about far more than the harbour itself and is seeking to stimulate regeneration of St Monans by generally improving the infrastructure so that more people will visit and be encouraged to stay and spend money. It is likely that the plans will include improved traffic management, parking and other supporting infrastructure at the harbour. This project is focussed largely on the dry tourism potential of the harbour although could include some suggestions for works to the harbour. Undertaking a master planning exercise of this type and scope was an aspiration at the time of the 2003 study.

St Andrews

The St Andrews Harbour Trust is pursuing plans to install up to 33 pontoons on west quay wall in short fingers, with a ramped access. It has some but not all funding in place to enable this to go ahead and anticipates that at least some pontoon provision will be in place by summer 2015, thanks to Axis 4 fisheries funding.

It would also like to develop some supporting facilities for harbour users and possibly a second phase of pontoon berths and to really make the harbour more of a focus for St Andrews by developing dry tourism aspects, as well as water-based activity. Many of these aspects have been aspirations since well before the 2003 study and it is encouraging to see that some at least will now be implemented.

Tayport

Although Tayport has had a significant number of pontoon berths for a long time, Tayport Harbour Trust has recognised that it lacks supporting infrastructure and this is a barrier to attracting visiting vessels. At the time of the previous study Tayport Harbour Trust was seeking to install a toilet/shower block on-site for harbour users, to provide facilities for visiting vessels and also to reduce costs as it was expensive to provide a portaloo on site all year. The Trust is still pursuing these plans but a meeting with Fife Council Funding Team staff has suggested Awards For All might be the best funding source as the cost is estimated as about £10,000 for a prefabricated unisex toilet/shower block and connection to the mains. Recent communication from the Trust indicates that it has been provisionally awarded funding for this project.

The Trust also wants to install more pontoon berths to satisfy demand and boost income generation and it plans to remove, refurbish and re-locate the older middle pontoon to

provide 30 new berths and install a new pontoon thus increasing capacity, income generating potential and reducing its waiting list.

2.13 Networking Activity

There are a number of vehicles that facilitate networking activity associated with Fife harbours and these are outlined below.

Fife Council's Harbour Users Group meets once a year and provides a forum to discuss issues associated with Fife Council's own harbours (both leisure and commercial), to provide an update on projects and spending and also an opportunity for users to raise issues of concern.

Forth Yacht Clubs Association (FYCA) was established in 1969 by the clubs in the Forth area to coordinate activities, represent their interests and further the interests of sailing in the Forth area. It encourages networking, co-ordinates racing, organises the East Coast Sailing Festival when it is hosted on the Forth and generally represents the interests of member clubs and sailing locally. Currently the clubs at Aberdour, Anstruther, Burntisland, Dalgety Bay, Dysart, Elie, Kinghorn, Limekilns, and Lower Largo are all members of FYCA. The FYCA produces a very useful publication, the Pilot Handbook, which provides information on all harbours on the East Coast from Berwick Upon Tweed to Fraserburgh and the next edition will extend to John O' Groats. There is a similar organisation on the Tay (Tay Yacht Clubs Association) but its website is being updated so no details have been sourced.

The **Royal Yachting Association Scotland** (RYA Scotland) has two roles. Firstly it is a membership organisation charged with looking after the interests of individuals, clubs, training centres and affiliates of the RYA in Scotland. Secondly it is the recognised governing body for sailing in all its forms in Scotland. Many clubs in Fife are members or affiliated to RYAS and several are recognised training centres. There are sailing development groups throughout Scotland but it is understood the one covering east and central Scotland is not very active.

The **Forth Estuary Forum** is a partnership of people and organisations around the Firth of Forth and draws its membership from a wide spectrum of interests including business, statutory agencies, local authorities and voluntary groups. The Forum's purpose is: "*To promote the wise and sustainable use of the Forth*". There is a similar organisation on the Tay. The Forth Estuary Forum has produced a booklet called *On the Forth – a leisure craft users' guide to the Firth of Forth*. This is a really useful publication but does not appear to have been widely distributed. The Forum is planning to host a conference on dredging and may be undertaking research into launching facilities around the Forth for a range of users. Fife Council is not currently a corporate member of the Forth Estuary Forum (cost £1,500 annually). Both the Forth and Tay Estuary Forums hold an annual conference.

The **Forth Ports Small Harbours and Sailing Clubs Group** meets once a year and is convened by Forth Ports as the body responsible for managing safety on the Forth and Tay. It provides an opportunity for Forth Ports to provide up dates and reminders and is also a forum through which issues can be raised.

The **Cross Party Group for Marine Tourism and Recreational Boating** meets two to three times a year to further the promotion of Scottish recreational boating and marine tourism and the wider benefits thereof. It encompasses a wide variety of interests and organisations. Fife Council has been invited to present this study/strategy to this group's June 2015 meeting.

Section 3 Other Water-Based Leisure Activity

3.1 Other Water-Based Leisure Activity

In addition to leisure sailing, other water-based leisure activity has also been explored in the course of this assignment. This includes passenger services, cruise liners, coastal rowing, sea angling and diving.

3.2 Passenger Services

There are two main pleasure boat businesses on the Forth operating various tours from Hawes Pier at South Queensferry. The **Maid of the Forth** has been established for many years and has been the official **Inchcolm Abbey** service since 1982. This operator also offers boat trips associated with the Scottish Seabird Centre at North Berwick and runs RHIB trips. A second operator, the **Forth Belle** began service at South Queensferry in 2006.

The Maid of the Forth has a capacity of 225 and offers a variety of cruises throughout April till October. These include one and a half hour sight seeing trips across and down the Forth, three hour trips to include sight seeing and a trip to Inchcolm Abbey (operated by Historic Scotland) and evening cruises. Typically there are three to four cruises daily but cruises are not available every day, particularly outwith peak summer months. The adult cruise price is £12 and £18.50 including the Inchcolm landing, and admission to the Historic Scotland property.

The Forth Belle also departs from Hawes Pier and offers sightseeing tours around the Forth, including trips to Inchcolm. The capacity of the Forth Belle is 215. The cruises last approximately 90 minutes and cost £13, the Inchcolm tour is also £13 plus admission to Inchcolm Abbey. Tours go under the Rail Bridge and around the various islands. *"The Forth Bridges Cruise – bus and boat tour"* offers direct access by coach from the centre of Edinburgh and costs £20. For 2015 cruises will run from February until October although not every day. There are up to four sailings a day and there are departures from North Queensferry on the eleven days that cruise liners are moored at Hound Point.

Inchcolm Abbey is a 4* attraction operated by Historic Scotland and open on a seasonal basis April through to September daily from 9.30 until 17.30. It is only accessible by boat and its website mentions the Maid of the Forth and the Forth Belle services, plus Seafari Adventure Tours and Edinburgh Boat Charters. The admission price for an adult is £5.50, with the ferry cost on top of this. Given its location and seasonal operation, visitor numbers at the Abbey are good at over 24,300 in 2014 and look to have increased significantly since the introduction of the Forth Belle ferry service.

It is understood that both the Maid of the Forth and the Forth Belle occasionally run services out of Aberdour.

Owned and managed by SNH, the **Isle of May** some five miles from Anstruther, is a National Nature Reserve. Passenger cruises are offered from Anstruther on the May Princess which is a 100 seat vessel. The adult fare is £24, and the trip takes around 4.5 – 5 hours with 2.5 – 3 hours on the island. This service has been operating for around 15 years and currently there are around 10,000 passengers a year. Trips run from April to end of September and there is only one trip per day, timed according to the tide and this means on some days there is no service. Booking is by e-mail or phone or there is a kiosk at Anstruther Harbour open in the run up to departure times. The operator also runs The Osprey, a RHIB which is a smaller, faster vessel, and only takes 25 minutes to reach the Isle of May and passengers then have the same amount of time on island. The Osprey trip costs £25 and waterproofs are supplied. RHIB trips also run from the Seabird Centre in North Berwick to the Isle of May.

It is understood that in recent years three different pleasure trip operators have piloted services out of **St Andrews** but apparently with only limited success. These offered trips out into the bay to watch wildlife but perhaps the lack of a destination (e.g. like the Isle of May or Inchcolm Abbey) contributed to the lack of success.

In 2007 a hovercraft passenger service between **Kirkcaldy and Edinburgh** was piloted and it is understood was very successful attracting 32,000 passengers over a two week period. There continues to be speculation about interest in such a project.

There are also proposals to run a passenger service between **North Berwick and Anstruther**. Although Fife Council Transportation staff have been approached about such a service running into and out of Anstruther harbour, a pilot scheme has yet to be commissioned. This proposal was discussed with East Lothian Council who suggested contacting the Seabird Centre about it. The Seabird Centre indicated that recent works at North Berwick Harbour meant it was now accessible at all states of the tide and that the operator who runs the other services locally (and also operates the Maid of the Forth) was interested in developing such a project. Contact has been made with the operator but no reply has been forthcoming.

As indicated in Section 2.12 Fife Council has recently secured Coastal Communities Funding to install a landing pontoon at **North Queensferry** between the Town Pier and the Forth Bridge. This project has been prompted by the heightened potential interest in the Forth Bridge if it secures UNESCO World Heritage Site status and also Network Rail's proposals to develop the Forth Bridge Experience comprising access to the Bridge itself and a visitor centre in North Queensferry immediately below the Bridge. Both of these could result in significantly more visitors to North Queensferry and various ways are being explored to help mitigate against potential negative impacts.

The desire is to develop a harmonised transport system that may include park and ride systems and encouraging people to make use of rail links. Encouraging travel by water is also part of this and a recent Fife Council study estimated that around 24,000 visitors might use water transport and land at the pontoon in North Queensferry. Note whilst it is hoped that the Town Pier will be restored in the longer term as funding is available, the pontoon will be delivered much more quickly and will present fewer tidal issues.

As far as can be ascertained, there are no regular passenger services on the Tay.

3.3 Potential for Passenger Taxis on the Forth and Tay

On the Forth

The potential to seek to operate waterborne taxi services between various locations on the Forth (including into the new North Queensferry pontoon berth) has been lightly explored during the course of this assignment and views of consultees have been sought.

It has to be said that there is limited enthusiasm from many knowledgeable people and it is considered that successfully developing and operating such a service would be very challenging. The identified issues include:

- Securing an operator or operators
- Complying with legislation
- Restricted access times at many Fife harbours will make the operation difficult, restrict timetabling and create difficulties in making a return trip
- The distances involved and tidal conditions mean journeys could be long and probably prohibitively so from many Fife harbours e.g. St Andrews and the East Neuk harbours
- Any service will be weather dependent and seasonal
- A RHIB trip might be a better option than a pleasure cruiser but only for the more adventurous as you get wet and it is not for nervous sailors!
- The limited capacity of vessels
- Additional time and cost so why would visitors use such a service? It could be argued that the opportunity to sail under the three Forth bridges might make it an attractive option.
- Location – visitors will not want to make a long detour to use such a service.

Taken all of these issues on board, the challenge is to identify a location or locations on the Fife side of the Forth which are:

- easily accessible for travellers from the north and west
- not too far from North Queensferry
- accessible at most states of the tide
- have room for parking
- have scope to provide some infrastructure (perhaps shelter and toilets)

Three sites have emerged as having potential and these are:

The old ***Kincardine Power Station*** site which is easily accessible from the west and north, has a large cleared site so could provide plenty of parking and has long jetty so would not be restricted by tides. The size of vessel would be restricted as they would need to pass under the Kincardine Bridge but it is known that the Maid of the Forth makes occasional trips upstream of the Kincardine Bridge. Very preliminary discussions have been held with the owner, Scottish Power, and the concept was not dismissed. Although there will be some activity on this site related to the Beaully to Denny power line, this is not associated with or in close proximity to the jetty area.

Burntisland Docks might also be a possibility as it provides deep water access at all times and could accommodate plenty of parking. Its location is not as good as Kincardine but its proximity to the railway station could be a bonus, especially for visitors from the north. This concept has been mentioned to the owners, Forth Ports, and is not ruled out although could not interfere with the commercial operations of the port. The Burntisland Sailing Club was enthusiastic about the potential to run a passenger service out of Burntisland and thought it would take about thirty minutes to reach North Queensferry, depending on the size and type of vessel.

The Scarborough Muir site at Rosyth Waterfront is being marketed by Invest in Fife as suitable for employment, port and renewables use. No contact has been made with Scarborough Muir but if this site was to be developed for a mixed leisure use, leisure shopping or similar then the master plan could potentially incorporate a water based taxi service to North Queensferry and potentially other locations.

There is also probably scope to operate a passenger service from locations other than South Queensferry on the south side of the River e.g. possibly from **Granton and Newhaven**. Such an approach would be welcomed in South Queensferry which is already congested with traffic and difficult to park.

Fife Council has noted the above but reiterated that it envisages the North Queensferry pontoon being used principally for existing cross Forth tourism services and to service cruise passengers.

On the Tay

It is understood that in the recent past a limited pleasure cruise service has run out of Newburgh on the Maid of the Tay. However, this vessel appears to be up for sale, possibly as a result of the owner retiring.

There is, however, interest in establishing small pontoon bases at various locations on the Tay near Perth. This is being led by the Tay and Earn Trust and Coastal Communities Fund grant has been secured to assist with the provision of small landing stage pontoons at Elcho, Willowgate and close to the Ferguson Gallery.

Connected to this is the V&A project at Dundee waterfront which may act as a catalyst to encourage passenger traffic on the Tay. This could present opportunities for a leisure trip service operating out of St Andrews or possibly Tayport.

3.4 Cruise Ships on the Forth

Cruise Tourism in Scotland

In 2013 Scottish ports attracted almost 385,000 cruise ship passengers on 454 ships, with approximately 70,000 passengers to the Forth (18% of the total) on 69 vessels (15% of the total)

Whilst the number of vessels was slightly down on 2012 (when 466 ships called at Scottish ports) the number of cruise passenger visits was up by around 10%.

In 2013, Scottish cruise tourism was worth an estimated £48.8m, a rise of 5% on 2012 (according to Cruise Scotland, the joint marketing body).

Again according to Cruise Scotland, the volume and value of cruise tourism has increased significantly over the past few years, with studies suggesting that cruise ship visitors could reach over 1m by 2029.

Identified constraints to growth include the need for face to face checking of documentation at UK ports and insufficient tour guides and linguistic skills at some ports.

Cruise Ships on the Forth

Depending on their size, cruise ships can dock on the Forth at Leith, Rosyth or Hound Pound. Hound Pound is just off South Queensferry and is used to accommodate the very largest vessels, with passengers being transported to South Queensferry by tender.

From Table 3a below it can be seen that whilst the number of vessels remained constant on the Forth in 2013 and 2014, far more cruise ships were using Rosyth in 2014. Forth Ports Ltd indicates that whilst it does not view Rosyth as suitable for leisure as such, cruise traffic has been growing at Rosyth and it is anticipated will continue to do so. Rosyth can handle reasonably large vessels and provides good deep water access, as well as having a very good quality building to handle cruise passengers.

Forth Ports is currently pursuing plans to develop Newhaven as a cruise port. This will be piloted in 2015 and it is anticipated that around 10-12 cruise ships might berth at Newhaven this year. Newhaven is viewed principally as a replacement to Hound Point, as it would provide a safer berthing location for large cruise ships, passengers would land closer to Edinburgh and it would reduce the current disruption in South Queensferry.

Table 3a: Cruise Ships Docking on the Forth (2013 and 2014)			
Port	Year	Number of Ships	Season
Hound Point	2013	21	24/04/13 – 17/09/13
	2014	20	23/04/14 – 05/09/14
Rosyth	2013	12	17/08/13 – 02/10/13
	2014	27	13/03/14 – 14/09/14
Leith	2013	36	28/04/13 - 28/09/13
	2014	22	09/05/14 - 24/09/14

Source: www.forthportscruise.com.

Many cruise passengers are on pre-booked itineraries, and some only have a short time ashore but many vessels stay at least one night. According to ground handling agents, passengers who are first time visitors to Edinburgh want to visit the city itself first and foremost but others are often keen to explore the wider local area.

A local body called Cruise Forth (see www.cruiseforth.com) provides information on a website and at Leith, Rosyth and South Queensferry when cruise ships are in port. This aims to help passengers who have not taken a pre-booked itinerary and provides information about what to see and do and transport, etc.

The Port of Dundee also welcomes cruise ships.

3.5 Coastal Rowing

Coastal rowing is a new activity that has emerged since the 2003 harbour study. The Scottish Coastal Rowing Association was established in 2010 to encourage boat building and rowing and racing of coastal rowing boats around Scotland. The basic boat is the St Ayles Skiff and its design was commissioned by the Scottish Fisheries Museum in Anstruther. This is 22ft long and has a crew of four rowers and a coxswain. Kits are available and it is estimated that it costs around £3,500 for a community to complete a skiff. Clubs then take part in racing and regattas and in fact a new type of relay event was trialled on the Forth recently involving yachts, skiffs and runners.

The coastal rowing initiative seems to have captured the imagination of coastal communities throughout Scotland and beyond e.g. England, USA, New Zealand with communities getting involved in building and racing the boats.

Coastal rowing seems to be particularly popular in Fife and several communities have established clubs/groups to build skiffs. Clubs in North Queensferry, Pittenweem, Anstruther, Crail, St Andrews, Newburgh and Wormit all have at least one skiff and Anstruther has three. Club/groups have been established in Dalgety Bay, Kinghorn, Burntisland, St Monans and Boarhills to get involved in building skiffs. The website www.scottishcoastalrowing.org provides details and out of the 88 vessels detailed throughout the UK, 10 are in Fife.

The St Ayles Skiff World Championships for coastal rowing skiffs was held in Ullapool in 2013 and is understood to have been very successful, attracting many competitors and spectators. The next Championship is scheduled for 2016 and a venue is being sought. The website provides details of what is required but basically these are:

- Space for a multi lane race course of around 1km by 300m.
- Some degree of shelter to reduce the chances of racing being cancelled.
- The ability to host the event over 3-4 days.
- Space to accommodate 50 or more skiffs.
- A willingness for local groups to lend skiffs if required.
- Facilities to enable crews to change over safely and quickly.
- Adequate safety cover.
- The ability to accommodate upwards of 1,000 “skiffies” close by overnight, including camping.
- A local host committee willing to take on all aspects of local organisation.

The timetable indicated on the website means it is probably too late now for Fife to make a bid to host the 2016 Championships. However, as the home of coastal rowing and the St Ayles skiff and with the keen local interest, it is strongly suggested that Fife should make a bid for future championships as this should result in significant economic impact and profile raising. This will, of course, be dependent upon securing a local hosting committee and a suitable venue. Whilst St Andrews has been suggested it may be too exposed and a beach location further up the Forth may be preferred.

3.6 Sea Angling

According to a 2009 report – *Economic Impact of Recreational Sea Angling in Scotland* – sea angling contributes around £140m to the Scottish economy and this was comparable with all Scottish freshwater angling combined. Fife was included in this study but only as part of the Edinburgh, Fife and South East area. Fife did not contain any of the top sea angling launch sites but was popular for on-shore sea angling. Total economic impact of sea angling for the Edinburgh, Fife and South East area was estimated as £11.6m although the importance of resident sea anglers was highlighted.

According to discussions with the Secretary of the Scottish Federation of Sea Anglers, the Forth and Tay are not particularly good areas for sea angling, with Arbroath tending to be the preferred location locally. Not all sea anglers or sea angling clubs will be members of the Federation but he is aware of sea angling activity out of Kirkcaldy, Methil, West Wemyss, Anstruther and Crail. There is also an active group at Buckhaven with some sheds and boats that use the beach to launch. He thought there may be one or two vessels at Anstruther or Pittenweem available for sea angling charters but web searches reveal nothing. If sea anglers are travelling with a vessel to an area to fish then the availability of slipways for launching are important, as is safe parking for cars and trailers.

The Scottish Sea Angling Conservation Network concurs that the availability of slips and safe parking are important considerations.

3.7 Diving

The 2003 study identified the Isle of May as a popular diving location with around 600 diving visitors annually. Discussion with Scottish Natural Heritage in the course of this study reveals that whilst divers are still active, they seem less likely to land on the Isle of May and hence no numbers can be provided. SNH provides guidance online for divers to help them dive responsibly around the Isle of May.

A web search for diving in Fife reveals there are several scuba diving clubs including Kirkcaldy Sub Aqua Club, and Fife Kelpies which meets in Dalgety Bay.

The Dive Bunker is a well established business in Burntisland offering diving training, equipment and commercial diving services. It also offers a variety of excursions to dive locations in the Forth including to wrecks and the Isle of May.

3.8 Sea Kayaking

It has not been possible to gain an indication of the interest in sea kayaking in Fife but it is understood that as a result of a conference organised by the Forth Estuary Forum in 2013, it may commission research into suitable launch sites for kayaking on the Forth to build up a database resource for users. This would also benefit other users who arrive by road and need to get access to the water e.g. wind surfers, divers, those with small boats on trailers, etc.

East Neuk Outdoors based at Cellardyke offers canoeing and kayaking.

Dun Eideann Sea Kayaking offers guided sea kayaking trips on the Forth and elsewhere and also provides training. Trips costs £45 for a half day and £80 for a full day. This business makes use of South Queensferry, St David's Harbour and Aberdour.

3.8 Fife Coastal Path

Whilst not strictly speaking a water-based leisure activity, it is worth mentioning the Fife Coastal Path which follows the coastline from Kincardine to Newburgh and attracts over half a million users annually. Obviously only a small percentage will walk the whole route but a key aspect of the Fife Coastal Path is the many attractive and picturesque harbours it encompasses. It is understood that a survey of Coastal Path users is underway and will update a previous version (2007) which estimated that the Path contributed £24m - £29m to the local economy.

It is worth noting that there are no public toilets at either end of the Coastal Path in Kincardine or in Newburgh and it would be useful to try to encourage local businesses to consider participating in Fife Council's Comfort Scheme.

3.9 Commercial Providers of Water-Based Leisure Activities

The research during the course of this assignment reveals there are only a few commercial providers of water-based leisure activity located in Fife – the Dive Bunker in Burntisland, Elie Watersports and East Neuk Outdoors. Fife Council's Outdoor Education service also provides watersports tuition and activities from its base at Lochore Meadows Country Park and is an RYA Training Centre.

Elie Watersports offers a wide range of water based activities and tuition including sailing, windsurfing, kayaking/canoeing, Stand Up Paddle (SUP) Boards, waterskiing, pedaloos, powerboat courses and inflatable boat trips. It is based at Elie harbour and is a RYA Training Centre.

Section 4 Fife and the East Coast Sailing Context

4.1 The Scottish Context

Scottish Enterprise published a study of *Sailing Tourism in Scotland* in 2010. As far as can be ascertained this is the most up to date research available and is certainly used

within the new *Marine Tourism Strategy* (March 2015). *SailScotland* has confirmed that the 2010 sailing study provides the most up to date market research.

The 2010 study brought together the findings of several previous studies, as well as undertaking new research. However, it is worth noting that this study only seems to have considered marina type pontoon berths and swing moorings hence may not have gained a full impression of the overall provision, particularly in places like Fife where the pontoon provision only accounts for some of the available moorings.

The 2010 sailing tourism study found that:

- The value of direct and indirect spend generated by Scottish sailing tourism was estimated as £101m annually, with around two thirds of this accruing from resident berths and a third from visitor berths.
- There were estimated to be around 11,000 resident marina berths and moorings throughout Scotland enjoying 95% occupancy. Another 1,700 berths were available for visitors but only 9% of these were in the East area.
- The Clyde and West areas accounted for the majority of spend generated overall (82%), with the East area (defined as Berwick to Peterhead) accounting for only 8%, and the North area accounting for 10% confirming the popularity of the West for sailing and sailing tourism.
- The total spend generated as a result of sailing tourism in the East area was estimated as £7.9m annually, with 83% attributed to resident berth spend and 17% to visitor berth spend.
- Resident berths on the Clyde area alone accounted for a third of the total estimated spend generated, with visitor berths in the West accounting for 21% of total spend.
- Visitor berths on the East of Scotland accounted for less than 4% of the estimated total spend generated as a result of sailing tourism. This illustrates the relative importance of East Coast sailing in the Scottish context and the rationale for its low priority.
- Scottish visiting boat expenditure was estimated as £129.94 per night (with 2.97 people on average on board) and the non-Scottish boat expenditure was £130.94 (with 3.3 people on board on average).
- Research during the study estimated there were 167,000 visiting boat nights annually throughout Scotland, with 56% of these being Scottish, 29% from other places in the UK and 15% from overseas.
- There were estimated to be around 6,500 visiting boat nights annually in the East area, with each visitor berth generating 22 nights on average.
- Sailors tend to be relatively affluent older people.

- The potential for growth in the East area was assessed as 3% per annum for residents' berths and 0.5% per annum for visitor berths but demand and market strength across the board in the East area was assessed as low.
- The average annual spend per resident boat in the East area was assessed as £3,850 (high), £2,540 (medium) to £1,950 (low). This was much lower than in the Clyde and West areas but slightly higher than the North area. The amount included berthing, chandlery, fuel, food and drink, transport, entertainment, etc and was derived from survey information.
- The study concluded that with the development of the market, the economic impact of the sailing tourism sector could be £145 million after 10 years i.e. by 2020.
- However, it also concluded that the strategic rationale for development in the East area in commercial or economic terms was much less acute than anywhere else in Scotland and that the East area is, in the main, populated by local boat owners and services a local market.
- Whilst the East area was not viewed as being strategically important for Scotland for any markets compared to other locations in Scotland, it was considered that a joint initiative/grouping based on the Sail Clyde model might be beneficial. (Note Sail Clyde is an industry-led, public/private partnership of operators and agencies coming together to agree a strategy and action plan for sailing in the area.) The study also recommended that each of the four areas should develop their own Sailing Tourism Development Strategies.

As a result of the 2010 study Tourism Intelligence Scotland produced an opportunities for growth guide for Sailing Tourism in Scotland. This indicated that the term “*sailing visitors*” can include touring yachts/cruisers spending at least one night at a destination but also racing participants, sailing events/festivals and those on a sailing package or charter.

It goes on to emphasise that sailing visitors can have a real impact on local communities by spending in local bars, restaurants and shops. In addition to a safe anchorage, waterborne sailing visitors are generally seeking a friendly welcome, a hearty meal, hot showers, local shops, rubbish disposal, electricity supply, possibly laundry and/or drying facilities and the ability to participate in some local culture. Increasingly internet access is required/expected for navigational information and communications.

4.2 Strategic Plan for Scotland's Marine Tourism Sector

The Scottish *Marine Tourism Strategy* launched in March 2015 is an initiative led by a working group of industry leaders and user groups, together with public agencies and enterprise bodies to focus on the sustainable growth of Scotland's marine leisure sector. It states that:

“By 2020 we want Scotland to be a marine tourism destination of first choice for high quality, value for money and memorable customer experience, delivered by skilled and passionate people.”

The strategy highlights the many strengths of Scotland’s marine environment including its beautiful and varied boating water, wildlife, and scenery. This strategy incorporates much of the data in the Sailing Tourism in Scotland 2010 and states that sailing and boating already generate over £101m annually of expenditure and support almost 2,730 jobs. The aim of the strategy is to grow the sailing tourism sector to £145m by 2020 and the overall economic contribution of the marine tourism sector from £360m to £450m - suggesting that this strategy follows on directly from the 2010 Sailing Tourism in Scotland Study, albeit has been some time in gestation.

This new strategy identifies the main growth potential as being *Home Turf* (UK based visitors) and *Near Neighbours* (including visitors from Scandinavia, Germany, Netherlands, France and Ireland) and it has a focus on sailing and boating but not exclusively so. The strategy encompasses tourists staying overnight and day visitors and includes both coastal and inland waters.

The strategy calls for a more coordinated effort and strategic approach to the sector and three development strands are outlined:

Providing Authentic Experiences

By building on Scotland’s strengths, such as nature, outdoor activities, heritage and events and festivals, and ensuring visitors’ holidays are enjoyable and authentically Scottish. The potential to develop cruising routes and themed journeys is also highlighted.

The importance of providing an authentic experience been recognised by consultees in the course of this Fife assignment and several have suggested the scope for growing existing and developing more events on the Forth, capitalising on the rich local heritage and many attractions, plus the scope to develop a Forth route with several stop off points encouraging more visitors (local and from further afield) to view the Forth as a destination for a week long holiday.

Improving the Customer Journey

Providing a consistently high quality visitor experience at all points of the customer journey. This may involve addressing the fundamentals, such as the standard of facilities encouraging greater use of local food and drink and developing the “*Marine Host*” concept.

Again this has been recognised in the course of the Fife assignment and many harbour owners, and clubs are acutely aware that Fife, with the exception of Anstruther, does not currently provide the level of supporting infrastructure required or expected.

Building our Capabilities

Ensuring the sector has a strong foundation on which to deliver excellent visitor experiences by focusing on quality, jobs and skills, marketing, collaboration and sustainability.

This aspect is significantly under-developed in Fife and on the Forth. There is very limited marketing and Fife has no sailing businesses as such i.e. it has no commercial marina, no charters, and no boat hire and even in the Forth these services are limited to Port Edgar, Granton and Edinburgh Boat Charters. Fife does, however, have a strong base of clubs and RYA Training Establishments.

In Fife Council's response to the consultation version of the *Marine Tourism Strategy*, it welcomed the approach but pointed out that it needed to be an all Scotland strategy and not just focused on the Clyde and West Coast.

A detailed Action Plan is now being developed to implement the *Marine Tourism Strategy* and will be presented at the Autumn Marine Tourism Seminar 2015.

4.3 SailScotland

SailScotland is the one stop shop for information relating to recreational boating in Scotland. Its website www.sailscotland.co.uk has been examined to ascertain how Fife and the East Coast in general are promoted. The East Coast encompassing Eyemouth to Aberdeenshire features as an area. Anstruther and Tayport are mentioned in the narrative as are Port Edgar and Granton and there is also mention of unimproved fishing harbours. However, one only has to look at the map to see that *SailScotland* activity including the events promoted on its website, is very focussed on the West Coast and Highland and Islands, consistent with the findings of the 2010 sailing study.

In discussion with *SailScotland* staff, the view is that there is no real culture of cruising on the East Coast and if people want a two week cruising holiday they will head for the West Coast which offers a different type of experience and a different shape of coastline. However, *SailScotland* does get enquiries about the East Coast and there are lots of people doing round Britain trips but there are issues with infrastructure and there is a big gap between Arbroath and Peterhead. Scotland does attract visiting vessels from Northern Europe and Scandinavia but these tend to head for Peterhead and Inverness then down Caledonian Canal to the West Coast or up to Orkney and Shetland.

The Fife (and Forth) sailing product is not discounted by *SailScotland* as lots of sailors enjoy visiting small harbours where they get a different experience than on offer at large marinas. However, the East Coast needs to build its infrastructure to have critical mass and sailors need the comfort of knowing where there are refuges in bad weather.

One aspect that may emerge from the newly published *Marine Tourism Strategy* is the ability to be able to sail right around Scotland's coast, so ways of filling identified gaps may be part of the Action Plan. In this respect this Fife assignment is welcomed, as would be an initiative to take a more strategic approach to sailing development on the Forth and/or the wider East Coast to create destinations and improve awareness and coordination.

The *SailScotland* website directory has 60 entries but only 10 of these are located on the East Coast – marinas at Eyemouth, Anstruther, Arbroath, Peterhead, Banff, Inverness, Inverness (Seaport) and Wick, plus two charter companies Ness and Moray Charters and Edinburgh Boat Charters. The directory does not include Port Edgar or Granton as these are not members of *SailScotland*. In this respect a number of Fife consultees

have asked why only Anstruther features in *SailScotland* and the answer is because Fife Council is a member and also pays for a small advert.

The cost of *SailScotland* membership is £350 including VAT and the cost of the small advert taken by Fife Council is around £215 including VAT. In discussion with *SailScotland*, it was clear that it would not be possible for Fife or Forth harbours to secure a joint membership of *SailScotland* but that it might be possible for one membership to secure wider coverage of other local harbours such as happens with the Aberdeenshire harbours. This is certainly something worth exploring and planning for the new brochure/website starts around July/August with paid advertising sought from August through to around October.

SailScotland also promotes sailing events and land based events with the ability to attract sailing visitors e.g. some music festivals. It does not promote small local events and racing and the onus is on event organisers to contact *SailScotland* to secure promotion of their events but there is no charge. As discussed at Section 2.10 the East Coast Sailing Festival is of a scale that it should be included on the *SailScotland* website and FYCA as the event organisers have been alerted to this opportunity. The Anstruther Muster organisers should also be encouraged to participate in the *SailScotland* promotional activities.

4.4 Welcome Anchorages

Welcome Anchorages is a free publication and also available online, with 72 pages detailing anchorages in Ireland and Scotland – see <http://www.welcomeanchorages.info/>. It aims to make sailing trips easier to plan and is produced by Yachting Life magazine but paid for by advertising. It is a well used and highly thought of publication.

In the 2015 edition there are no Fife anchorages included and in fact there is nothing at all south of Peterhead on the East Coast. This probably means that there is no interest from any local businesses in taking the paid advertising or perhaps they have never been approached. However, it is understood that as of 2016 the East Coast south of Peterhead will be included in *Welcome Anchorages*.

4.5 The Forth and Clyde Canal

The opening of the Forth and Clyde Canal created an expectation that significantly more visiting vessels would be attracted to the Forth. However, at the time of the previous study fewer than 100 vessels annually were using the Canal for transit purposes. Scottish Canals indicates that currently around 120 - 150 vessels are transiting the Forth and Clyde Canal annually and that this has been fairly stable over recent years. Many of these are likely to be East Coast vessels being taken to the West for the season or for specific events e.g. the Commonwealth Games Clyde Flotilla. This compares to around 1,600 vessels transiting the Caledonian Canal annually.

Improvements have recently been made to the access arrangements at the east end of the Canal, including the removing overhead obstructions and increasing the time that access to the Canal is possible. However, there are still draft restrictions (vessels

drawing less than 1.8m) and air restrictions, with a requirement for masts to be lowered soon after entry, hence larger vessels cannot be accommodated.

The Scottish Canals representative indicated that there are issues with awareness and perception of the Forth and Clyde Canal and this is exacerbated by the lack of supporting infrastructure on the Firth of Forth and the fact that there are no harbours close to the entrance of the Canal. He has indicated he would be interested in participating in a group to consider ways of developing leisure sailing on the Forth/East Coast.

According to press reports the recently opened large and impressive Kelpies sculpture on the Canal near Falkirk has attracted around 1m visitors to date. This might be prove an added attraction for vessels to use the Forth and Clyde Canal and certainly adds to the local tourism offering.

4.6 Contact With Neighbouring Local Authorities

Contact has been made with appropriate staff at neighbouring local authorities including Scottish Borders, East Lothian, City of Edinburgh, Perth and Kinross, City of Dundee, Angus and Aberdeenshire to discuss the Fife harbours study and lightly explore the scope for collaboration. The first thing to say is that the feedback has been very positive and there is excellent interest in considering the scope for collaborative projects. The second point is that the recent launch of the *Marine Tourism Strategy* has been fortuitous as it has created an interest in the marine sector. Input has been received from almost all of those contacted and all have indicated that they would be interested in coming together for a meeting/workshop to identify how they might work together on marine tourism.

East Lothian has harbours at Cockenzie & Port Seton, Dunbar and North Berwick, and Fisherrow (Musselburgh). All have some visitor activity, with the Scottish Seabird Centre at North Berwick harbour being a focus for visitors.

City of Edinburgh Council has developed a Cruise Tourism Action Plan and had previously considered developing a maritime tourism strategy but thought Edinburgh perhaps lacked the critical mass of facilities. There are harbours at Granton, South Queensferry, Port Edgar and Port of Leith/Newhaven Harbour.

City of Dundee has plans for a marina as part of its regeneration of the waterfront area. It is in discussion with Forth Ports about a lease, and the works that would be required. It anticipates that it would start off in a small way but considers there is good potential to attract waterborne visitors from the Baltic States. Dundee City Council is keen to collaborate with neighbouring areas and already doing this through the wider V&A project. It is also looking at the scope for passenger services on the Tay.

In Perth and Kinross, the Tay and Earn Trust has secured Coastal Communities Fund grant to develop three small pontoon landing stages at Elcho, Willowgate and Ferguson Gallery. This is enabling infrastructure to encourage marine activity. Perth and Kinross Council is not now selling Perth Harbour so may wish to consider options for its future use.

In Angus, Arbroath is the focus for leisure activity. It has six visitor berths, fishing trips, and Arbroath Sea Safaris makes trips to the Bell Rock, etc. There are plans to develop a new maritime heritage trail so this could also present good opportunities for joint working.

There are many harbours in Aberdeenshire and along the Moray Coast and many are ex fishing harbours, not dissimilar to those in the East Neuk. There are marinas at Peterhead, Banff and Whitehills.

4.7 Conclusions on Demand

There are fundamental differences between the West Coast and East Coast sailing offer and experiences and the East suffers from this comparison in terms of its drying harbours, lack of sea-lochs and islands to provide safe anchorages and lack of marina type facilities. Fife and the East Coast tend to be most suitable for smaller vessels that can rest on the bottom and realistically the ability to attract large, expensive sea-going crewed vessels is extremely limited. It is perhaps also fair to say that the fundamental issues associated with East Coast sailing are compounded by limited awareness and/or negative perceptions of what the East Coast has to offer.

The East Coast is not viewed as of strategic importance by national bodies and demand and scope for growth is considered as low and constrained and the main market is viewed as fairly local i.e. day boats or local vessels visiting a harbour other than their home port for a night.

The situation does not seem to have changed very much at all from the time of the previous study.

Fife and the East Coast have a lot to offer in terms of their small historic harbours, history/heritage, local produce, good eateries, and welcoming communities but there seems to be very limited or indeed no pro-active and/or joint marketing activity undertaken.

FYCA Pilot Handbook is a very useful document in respect to East Coast sailing but some of its comments could be revised to be made more positive e.g. the narrative for Pittenweem and Burntisland.

In Section 5 the development of a Forth and/or East Coast sailing initiative to improve cooperation, coordination, and marketing is discussed and it is suggested that adopting a more pro-active and joint approach to marketing is the key aspect in growing the Fife, Forth and East Coast sailing market. However, a more pro-active approach to marketing must be underpinned by the required supporting infrastructure if it is to deliver the experience promised in the marketing material.

Section 5 Findings, Conclusions and Recommendations

5.1 SWOT of Fife Harbours from a Leisure Perspective

Taking on board all of the research in the previous sections a SWOT of Fife's harbours is provided below.

SWOT of Fife Harbours from a Leisure Perspective	
Strengths	Weaknesses
<p>Many attractive, historic harbours</p> <p>Many active self sustaining clubs</p> <p>Attractive destinations to sail to around the Forth – islands, cross and up and down</p> <p>FYCA and other as co-ordinating vehicles</p> <p>Many harbours in public ownership</p> <p>Good sailing and cruising conditions</p> <p>Some cross Forth passenger services</p> <p>Nearest Scottish landfall to Northern Europe</p> <p>Several RYA Training Centres</p> <p><i>"Business-like"</i> approach of a few owners</p>	<p>Tidal – access restrictions and drying harbours</p> <p>Dredging is required but is very expensive</p> <p>Few commercial providers</p> <p>Few deep water harbours</p> <p>Few sheltered anchorages</p> <p>Limited supporting infrastructure at many harbours</p> <p>Limited scope for economic impact at many harbours</p> <p>Modest numbers of visiting vessels</p> <p>No real marketing activity</p> <p>Lack of awareness of what is available</p> <p>Lots of naval and commercial traffic on the Forth</p>
Opportunities	Threats
<p>Coastal rowing</p> <p>Better access to deep water harbours</p> <p>Start marketing</p> <p>Improve supporting infrastructure</p> <p>Capitalise on the good clubhouses at some locations</p> <p>Adopt a joint Forth and/or East Coast approach to marketing and development</p>	<p>Intrinsically less attractive than the West Coast – tidal, few refuges, less well developed infrastructure</p> <p>Ageing club membership</p> <p>Generally modest berthing charges which may not enable the maintenance regime ideally required</p> <p>Lack of funding to maintain harbours in a safe, useable condition and for development</p>

Potential to attract major events – Tall Ships, Skiff World Championships	Deep water harbours are used for commercial activities
Potential to grow existing events e.g. East Coast Sailing Festival	User's expectations for "marina" style facilities
Kirkcaldy Esplanade for spectator events	Lack of joined up approach
Existing Forth Road Bridge for spectator events once new bridge is complete	No strategic approach to water based leisure development around the Forth and/or East Coast
New <i>Marine Tourism Strategy</i> – interest in the sector	Current limited contribution of the East Coast to sailing tourism
Forth and Clyde Canal link	Perceptions of East Coast sailing
Directory of slipways for car borne water users	Low priority of East Coast sailing in the national context
Marina/housing development at Methil No 3 Dock but only as part of a new master plan	
Potential World Heritage Inscription for the Forth Rail Bridge	

5.2 Economic Impact

The 2003 study estimated that the economic impact of leisure users of Fife harbours was around £550,000 but indicated that this should be treated with a degree of caution as it was based on very broad assumptions. At the time there was very little market intelligence on which to base spend figures and these were largely derived from a local study which had estimated the economic impact of the pontoon berth users at Anstruther.

More robust spend estimates are now available from the 2010 *Sailing Tourism in Scotland* study which found that:

- The average annual spend per resident boat in the East area was assessed as ranging from £1,950 - £3,850. This included berthing, chandlery, fuel, food and drink, transport, entertainment, etc and was derived from survey information.
- Scottish visiting boat expenditure was estimated as £129.94 per night and the non-Scottish boat expenditure was £130.94.

For this current study, spend has been based on the above figures as detailed in Table 5a. All resident boat spend is based on using the lowest East area estimate (£1,950) as this appears most reasonable given what is known about the profile of sailors locally.

The total spend associated with the use of Fife harbours for leisure sailing and angling is estimated as £1,338,120. This represents a significant increase on the 2003 estimated

economic impact. However, much of the apparent increase may be down to having more robust figures on which to base the estimate although there does appear to have been some increase in activity as well at places such as Limekilns, Anstruther, St Monans and St Andrews. The estimated spend figure for Fife represents 16.7% of the East area spend of £7.9m in the *Sailing Tourism in Scotland* study which would appear to be reasonable. This estimate does not include other waterborne leisure activity such as kayaking or diving as there is insufficient information on use and spend to make a meaningful estimate. It also does not include visitors attracted to the events or any activity related to passenger and cruise services.

Table 5a: Estimated Economic Impact of Leisure Users of Fife Harbours			
Locations	Assumption	No of Vessels	Estimated Economic Impact
Pontoon Berths			
Anstruther and Tayport	Low Resident Spend from 2010 Study	188 pontoon berths x £1,950	£366,600
Active Leisure Sailing and Angling Locations			
Limekilns, Dalgety (moorings), Aberdour, Burntisland, Kirkcaldy, Methil, Elie, St Monans, Anstruther (non pontoon), Crail, St Andrews, Tayport (non pontoon), Wormit (moorings)	50% of Low Resident Spend from 2010 Study	647 x £975	£630,825
Dinghy Sailing			
Dalgety Bay, Kinghorn, Lower Largo, St Andrews, Wormit, Newburgh	25% of Low Resident Spend from 2010 Study	505 x £487.50	£246,188
Harbours with Only Informal Leisure Activity			
Kincardine, Charlestown, Inverkeithing, Pettycur	12.5% of Low Resident Spend from 2010 Study	78 x £243.75	£19,012
Total Resident Economic Impact			£1,262,825
UK Visiting Vessels	£129.94 per vessel per night – assume 90% of vessels	521 visiting vessel nights X £129.94	£67,700
Non UK Visiting Vessels	£130.04 per vessel per night – assume 10% of vessels	58 visiting vessel nights x £130.94	£7,595
Total Visiting Vessel Economic Impact			£75,295
Total Economic Impact of Leisure Activity Sailing and Angling at Fife Harbours			£1,338,120

5.3 The Assessment Framework

The previous study used ten criteria to assess the suitability of Fife harbours for leisure development. This assessment framework has been reviewed and augmented and the explanation of the scoring has been made more explicit as detailed below.

Owner's attitude and aspirations

- 0 Ownership unclear
- 1 Ownership established but no contact
- 2 Ownership established but no interest in developing
- 3 Owner might be interested in developing
- 4 Owner keen to explore development potential
- 5 Owner very keen and actively considering development opportunities

State of repair – in general terms

- 1 Very poor
- 2 Poor
- 3 Generally good
- 4 Good
- 5 Excellent

Maintenance schedule – is it maintained, can maintenance be assured?

- 1 Has not been maintained over many years
- 2 Has had some ad hoc works but no regular maintenance regime
- 3 Limited but regular maintenance activity
- 4 Programme of regular maintenance but limited by funding
- 5 Planned, well funded, regular maintenance regime

Location

- 1 Up river of Forth or Tay Road Bridges
- 2 North Queensferry to Methil
- 3 Lower Largo to Crail
- 4 Fife Ness to Tay Road Bridge

Ease of road access

- 1 Very poor
- 2 Poor
- 3 Ok
- 4 Good
- 5 Very good

Current use

- 1 Mainly industrial or commercial fishing
- 2 No obvious use
- 3 Limited leisure/fishing activity
- 4 Mainly dinghy sailing
- 5 Some leisure/fishing activity
- 6 Considerable leisure activity

Capacity considerations

- 1 No spare capacity and waiting list
- 2 No spare capacity but no waiting list
- 3 Additional capacity could be provided through investment
- 4 Some spare capacity
- 5 Plenty of capacity

Sailing conditions and considerations – access, draft, safety, drying harbour, etc

- 1 Drying harbour with very limited access times
- 2 Bay/beach suitable for smaller vessels only
- 3 Drying harbour with reasonable access
- 4 Drying harbour but with good access and access channels maintained
- 5 Impounded water, and/or accessible at all/most states of the tide

Existing infrastructure around the harbour – toilets, electricity, showers, parking,

- 1 No user infrastructure
- 2 Limited to parking
- 3 Some limited supporting infrastructure in the vicinity but not specifically for harbour users
- 4 Some supporting infrastructure at or close to the harbour including clubhouses
- 5 Good supporting infrastructure

Existing local economic impact and scope for more e.g. proximity to shops, pubs, cafes etc

- 1 No or limited economic impact and unlikely to be scope for any
- 2 Limited economic impact but with scope for more
- 3 Some economic impact but limited scope for more
- 4 Some economic impact but with good potential for more
- 5 Significant economic impact

Leisure Development potential around the harbour

- 0 None or extremely limited
- 1 Limited to making the area more attractive and/or tidier
- 2 Some potential but limited space available
- 3 Some potential and space available
- 4 Good potential but limited space available
- 5 Good potential and space available

Magnitude of likely capital costs

- 1 Very High (several £ms)
- 2 High (up to £1m)
- 3 Medium (up to £250,000)
- 4 Limited (up to £50,000)
- 5 Very limited (up to £20,000)

Club/User Activity

- 1 No evidence of a club
- 2 Loose association of users but no club
- 3 Club/user group
- 4 Active Club/user group
- 5 Active club/user group keen to progress development ideas

All harbours with a degree of leisure activity (apart from the three islands) have been assessed against the above criteria and this assessment is contained in Table 5b. The assessment is based on the audit visits and consultations with owners, clubs and users and it provides a useful guide in terms of a leisure development potential hierarchy for Fife's harbours.

Three harbours emerge as the front runners from a leisure development perspective – Anstruther, St Andrews and Tayport all score over 50 and are the same harbours with the highest scores in the 2003 study. These are followed by Dalgety Bay, Burntisland, Limekilns, Aberdour, Elie, St Monans and North Queensferry (West Harbour) which all score between 41-50 and Dysart, West Wemyss, Methil, Kirkcaldy all scoring 35-40. Those locations scoring less than 35 may have some leisure development potential but are likely to be less attractive for a variety of reasons.

Table 5b: Assessment of Leisure Potential of Fife Harbours														
Location	Owner's Attitude	State of Repair	Maintenance	Location	Road Access	Current Use	Capacity	Sailing Aspects	Infra-structure	Economic Impact	Leisure Dev Potential	Cost	Club	Total
Kincardine long jetty	3	3	3	1	3	2	n/a	5	1	1	3	2	1	28
Kincardine Shipping Pier	1	2	1	1	2	3	n/a	1	1	1	1	0	2	16
Kincardine Town Pier	2	3	3	1	2	2	n/a	1	1	1	1	0	1	18
Culross Jetty	3	3	1	1	5	3	n/a	1	4	2	3	0	2	28
Charlestown	1	1	1	1	4	5	2	3	2	2	4	1	1	30
Limekilns – Town Pier and Brucehaven	3	3	3	1	4	5	4	3	4	3	2	5	5	45
NQ West Harbour	4	3	3	2	4	5	1	3	3	3	2	3	5	41
NQ Town Pier	5	2	2	2	4	2	n/a	3	3	2	2	2	1	30
Inverkething	0	2	2	2	4	3	n/a	4	2	1	1	0	2	23
St David's	0	3	2	2	4	2	n/a	3	2	1	1	0	1	21
Dalgety Bay	4	4	4	2	4	4	2	2	4	3	3	5	5	50
Aberdour	3	4	3	2	3	5	2	3	4	3	2	5	5	44
Carron	2	1	1	2	1	2	n/a	3	1	1	0	1	1	16
Burrtisland	3	3	3	2	3	5	3	5	4	3	5	3	5	47
Pettycur	2	4	3	2	3	3	2	2	3	1	2	0	2	29
Kinghorn	0	4	3	2	2	4	n/a	2	4	3	2	0	4	30
Kirkcaldy	2	4	3	2	5	5	1	4	1	3	2	0	4	36
Dysart	2	3	3	2	3	5	1	3	4	3	2	1	5	37
West Wemyss	3	2	2	2	4	5	2	3	2	3	2	1	5	37
Methil	3	2	1	2	5	5	n/a	5	2	3	5	1	3	37
Lower Largo	3	1	1	3	3	4	n/a	3	2	3	2	5	1	31

Pier														
Elie	3	5	4	3	3	5	n/a	3	5	5	3	0	4	43
St Monans	3	4	3	3	3	5	3	3	3	4	2	1	5	42
Pittenweem	2	5	5	3	3	1	n/a	4	5	3	2	0	1	34
Anstruther Wester	2	4	3	3	2	2	n/a	1	2	1	1	0	1	22
Anstruther	4	5	5	3	4	6	1	4	5	5	4	4	4	54
Cellardyke	2	4	3	3	1	2	4	3	2	1	1	0	1	27
Crail	3	4	3	3	3	3	2	3	3	3	2	0	5	37
St Andrews	5	4	4	4	3	5	4	4	4	4	4	3	5	53
Tayport	5	4	4	4	4	6	1	4	3	4	4	3	5	51
Wormit	3	4	3	1	4	4	n/a	3	4	2	2	0	4	34
Newburgh	0	2	1	1	3	4	n/a	3	4	2	2	0	3	25

5.4 Funding Sources for Fife Harbours

There are a number of sources of funds that could be targeted by owners and users of Fife harbours. However, all are competitive and there are no guarantees that funding will be forthcoming for a particular project. User groups and clubs may be eligible for some sources of funds not open to the private sector or local authorities but will usually be expected to have security of tenure through ownership or a long lease. A number of the funding sources highlighted below are currently closed but may re-open or may become available through the launch of new programmes. Larger projects will almost certainly need to look at assembling a package of funding as are unlikely to be able to source all they require from one funder. It is considered that it will be challenging and time consuming to assemble funding packages for harbour related projects and there is no prime or specific funding source. The funding sources below are listed in alphabetical order and not in order of importance.

Community organisations can apply for lottery funded grants of between £500 and £10,000, to assist community led, and sports and arts projects through **Awards For All**. Although this scheme provides only modest sums of assistance, it is possible to apply on more than one occasion and the application process is relatively straight forward. Not for profit and voluntary groups can apply including social enterprises, community councils and statutory bodies are all eligible and more details can be found at www.biglotteryfund.org.uk/awardsforallscotland.

Coastal Communities Fund is administered by Big Lottery and eligibility is restricted to council areas which have a coastline and to settlements of less than 100,000. The aim of the Coastal Communities Fund is that *“Coastal communities will experience regeneration and economic growth through projects that directly or indirectly create sustainable jobs and safeguard existing jobs”* and applicants must demonstrate how they link with the key thrusts of local economic development. See website www.biglotteryfund.org.uk for more details.

This scheme is open to many sorts of bodies including charitable bodies, social enterprises, development agencies, private companies and local authorities but seeks to encourage a partnership approach. For capital projects, applicants must own or have the lease of the asset. The scheme has a two stage application process and can provide up to 100% of the required project funding although securing other appropriate support is encouraged. The minimum grant is £50,000 with no maximum stated.

The Coastal Communities Fund is now closed, but Eyemouth Harbour Trust secured funding for pontoons through this fund, as did Fife Council for the pontoon landing stage at North Queensferry.

The **Community Spaces Scotland** strand of Big Lottery supports communities to become more involved in and to take responsibility for communal spaces and places. This fund can support both indoor and outdoor projects. Voluntary/community and social enterprises can all access this funding. Grants of £10,000 to £250,000 are available and this fund will provide up to 95% of project costs, although it seeks to be the majority funder of the projects it assists.

Projects must achieve all three of the schemes stated outcomes:

- Communities come together to make better use of local spaces and places

- Communities come together to improve their environment
- Communities come together to get healthier and be more active.

Projects must be located within eligible postcode areas, generally those suffering from a degree of deprivation. This scheme is currently closed but this or something similar may be part of Big Lottery's new funding framework. (See website www.biglottery.org.uk)

The **Crown Estate Marine Stewardship Fund** is provided through the Crown Estate but is different from the Coastal Communities Fund (see www.thecrownestate.co.uk for more details.) It supports projects associated with access (including pontoons, moorings and slipways), awareness, biodiversity, environment and management and has distributed over £1m in Scotland since 1999. However, it is designed to support community initiatives that promote the sustainable management of the Crown Estate Coast and this means supported projects must take place on or directly connected with the Crown foreshore and/or seabed. This is a constraint in Fife (and the Forth overall) as only small parts of the Fife Coast are within Crown Estate ownership e.g. areas around Lower Largo.

Fife Council can make modest amounts of funding (perhaps around £5,000) available through Locality budgets for community based projects. Funding can also be available through the Supporting Enterprising Communities budget but again it is modest amounts.

Fife Environment Trust distributes monies associated with landfill tax and seeks to support community, heritage and environmental projects across Fife which:

- Improve the quality of life for local communities by safeguarding and supporting improvements to the built and natural environment of Fife.
- Support local community led urban and rural regeneration schemes that encompass social inclusion and community capacity building.

Grants of up to 75% of eligible costs can be awarded, although the maximum grant is £50,000. A-listed buildings/structures are viewed as a priority compared to others but projects must provide a specified amount of public access and put in place clear arrangements for ongoing maintenance.

Eligible community groups and organisations must be constituted not-for-profit organisations and must have the power to accept grants set out in their constitution or governing document. The applicant must demonstrate it has security of tenure and this was a stumbling block for the West Wemyss Boat Club when it sought to access this fund.

The March 2015 deadline was the last funding round based on the current administrative arrangements as landfill tax has been devolved to Scotland from 1st April 2015. However, the Scottish Landfill Communities Fund has replaced the existing scheme but Fife Environment Trust will continue to play a role in distributing grant funding to communities although there may be some changes. See www.fifedirect.org.uk/fet for more details.

The **Growing Community Assets** scheme seeks to give communities more control and influence over their own future through ownership of assets. This Big Lottery scheme can meet 100% of costs and can provide grants of up to £1m. However, projects must provide strong evidence of need (not just demand) and this must be demonstrated. The emphasis of this scheme is on activities and outcomes and it is not about buildings/spaces but rather what the community wants to do within them to make a difference. There are strict conditions relating to the structure and membership of eligible bodies.

Projects must meet all four outcomes of this programme

- Communities work together to own and develop local assets.
- Communities are sustainable and improve their economic, environmental and social future through the ownership and development of local assets
- Communities develop skills and knowledge through the ownership and development of local assets.
- Communities overcome disadvantage and inequality through the ownership and development of local assets.

This scheme will shortly close to new applicants but a similar scheme may be part of Big Lottery's new funding framework. The current scheme would probably prove quite difficult and challenging for harbour projects to access, although a community-led project such as is being developed in St Monans might stand a chance of securing funding.

The **Heritage Lottery Fund** operates several grant schemes. Including Sharing Heritage which provides grants of £3,000 - £10,000 and is for any not-for-profit group wanting to explore, share and celebrate their community's heritage. The Our Heritage scheme provides grants of £10,000 - £100,000 to protect and share heritage and is open to a wide variety of organisations including community groups, trusts and charities. Heritage Grants provide grant assistance of over £100,000, but are much more onerous to apply for and take much longer to access through a two stage process.

HLF seeks to use its funding to achieve its desired outcomes. For heritage these are that heritage is better managed, in better condition, better interpreted and/or identified/recorded. Outcomes for people include developing skills, learning about heritage, changing attitudes/behaviour, increasing enjoyment of heritage and encouraging volunteering. Outcomes for communities include reducing negative environmental impacts, involving more people and a wider range of people in heritage activities, making the community a better place to live, work and visit, boosting the local economy and making organisations more resilient. See www.hlf.org.uk.

St Andrews Harbour Trust has previously secured HLF and other harbours groups might be able to do so in the future. Modest projects such as information boards would probably be attractive to HLF and larger restoration and conservation projects should not be ruled out but would need to thoroughly demonstrate their heritage credentials.

Heritage Enterprise is a relatively new Heritage Lottery Fund programme aimed at assisting projects that seek to achieve economic growth by investing in heritage. It is primarily for enterprising community organisations to help them rescue neglected historic

buildings and sites and return them to a viable productive use. Grants of £100,000 to £5m are available through a two stage application process.

Heritage Enterprise is designed to bridge the funding gap that prevents a historic asset in need of repair from being returned to a beneficial and commercial use. HLF is seeking to fund projects that will make a lasting difference to heritage, people and communities. Projects should have the potential to unlock a heritage asset in need of investment and utilise it as a stimulus for economic growth.

Priority will be given to projects that are located within areas experiencing economic disadvantage, and to projects that focus on heritage assets which are both considered as at risk and formally designated.

This scheme has a two stage application process and applicants seeking a grant of less than £1m must contribute at least 5% of the conservation deficit but this can be cash, volunteer time, and/or non-cash contributions. More details can be found at www.hlf.org.uk. Perhaps a harbour such as Charlestown could be eligible under this programme if a community based organisation became involved.

Historic Scotland's Historic Building Repair Grants Scheme provides grants of between £10,000 and £500,000 to assist owners to meet the cost of high quality repairs using traditional materials and specialist craftsman to conserve original features in buildings and structures of special architectural or historic interest. In return owners are required to insure and maintain the funded buildings and to allow a degree of public access. Applicants must own or have a long lease on their asset and there are three funding deadlines a year.

All works undertaken must be of a high professional standard and sympathetic to the character and significance of the building/structure. The proposed end use of the building or structure and the wider benefits that the project may provide, such as benefits for communities, and/or the development of knowledge and skills also play a part in the assessment process. See www.historic-scotland.gov.uk/grant for more details.

This scheme could potentially provide funding for the repair and conservation of some of Fife's historic harbours although those that are A-listed would probably stand the greatest chance of securing funding, for instance St Andrews Harbour has previously secured funding.

LEADER is a European fund aimed at stimulating local rural development and the rural areas of Fife including much of the coastline. A new LEADER Programme is due to start in 2015 and places greater emphasis on encouraging rural business development although community projects will still be eligible.

LEADER 2014 – 2020 will incorporate European Fisheries Funding although there will be a separate allocation for this. The previous fisheries areas are being expanded, with Fife, East Lothian and Scottish Borders forming one of three new FLAG areas (Fishery Local Action Group). Angus will join with Moray and there will also be a West Coast FLAG. This new arrangement will bring benefits including access to a wider pool of new project ideas and could be beneficial in progressing with aspects of this current study/strategy.

LEADER has a limited amount of funding and as it seeks to encourage bottom up development, tends to favour supporting a large number of projects rather than supporting just a few large projects. Constituted community groups can apply. LEADER will probably have a cap on the maximum level of funding, perhaps £50,000 as in the last Programme. LEADER could be an appropriate source to target for many of the projects/initiatives suggested in this study/strategy. See www.leaderinfife.org for more information.

LEADER also funds co-operative projects between different areas so if there was interest in a collaborative marketing project for the Forth and/or East Coast then LEADER could be a good source to target.

The **Scottish Land Fund** supports rural communities to become more resilient and sustainable through ownership of land and land assets. It can provide funding of £10,000 - £750,000 for rural communities of fewer than 10,000 people to buy land/land assets and can also provide revenue support. It could be applicable in Fife if a community group wanted to purchase a local harbour from an owner. See www.biglottery.org.uk for more details.

SportScotland's Sport Facilities Fund can provide funding of £10,000 - £500,000 to provide or upgrade sports facilities for the general community. Applications can be led by local authorities, clubs, trusts, etc. This fund would not fund harbours per se but it might be appropriate for those clubs and locations that are involved in training and increasing participation to improve changing facilities, clubhouses, etc.

Village SOS is available through Big Lottery to help kick start a rural revival using the power of sustainable community enterprise and can provide £10,000 - £50,000. Village SOS is only available to settlements with fewer than 3,000 residents so some of the smaller Fife communities with harbours could be eligible. See www.villagesos.org.uk for more details. This programme is currently closed.

In addition to the grant sources above there is a myriad of **grant making trusts** operating in Scotland and the UK, each with their own philanthropic objectives and application processes and some might be potential sources of grant for harbour projects. These need to be carefully targeted to ensure that the project applied for closely matches the areas of supported activity and desired outcomes articulated by the funder.

Encouraging community buy-in can be a useful of demonstrating community support to funders and generating match funding and it might be that people could be invited to **sponsor** certain elements of a harbour project e.g. the buy a brick type concept.

5.5 What Hasn't Changed Since the 2003 Study?

It is worth highlighting some of the fundamental aspects that have not changed since the previous study and these are outlined below.

From a natural heritage perspective, the Firth of Forth is designated as a Special Protection Area (SPA) and supports internationally important numbers of waterfowl. The SPA is underpinned by the Firth of Forth Site of Special Scientific Interest (SSSI), which is of importance for a variety of geological features, coastal and terrestrial habitats,

plants, and wintering birds. The Firth of Forth is also a RAMSAR site due to the wide range of waterfowl it accommodates. These designations may act to limit development potential at some locations.

Most harbours in Fife are tidal and dry out completely at low tide and this limits access and the size and type of vessels that can use them.

Many Fife harbours require dredging to keep them useable. Dredging needs to take place regularly, perhaps every five years or so but is extremely expensive.

Some Fife harbours have had no investment since the previous study and are in poor condition e.g. Charlestown.

Some of the aspirations highlighted in the previous study are only now coming to fruition e.g. pontoons at St Andrews.

Some Fife harbours would benefit from a good clear out of “*project*” and older vessels, including North Queensferry and St Monans.

There is still a long waiting list for pontoon berths at Anstruther, despite the fact that it now has 100 pontoon berths as opposed to only 32 at the previous study.

Whilst many owners and clubs are able to undertake routine maintenance activity, they do not generally have funding for development. Most clubs/owners reported incomes of £5,000 – £20,000 but there are a few with higher incomes.

It remains challenging to identify and secure funding for harbour projects.

Charges at most Fife harbours (including Fife Council's) are relatively modest and there is still a stated desire to keep sailing affordable at several Fife harbours and clubs. The low level of charges at some harbours e.g. West Wemyss and Dysart are probably not a fair reflection of the routine maintenance required. Whilst no harbours in Fife can be considered as commercial, the charges at St Andrews and Tayport are relatively high in the Fife context but are probably a more realistic reflection of the scale of operating and maintenance costs. It is perhaps no coincidence that both of these harbours are owned by trusts which are adopting a business-like approach to managing their harbour assets.

There are many active sailing, cruising and dinghy clubs in Fife, with more limited sea angling activity. Most clubs adopt a self help ethos to managing and maintaining their harbours. Many clubs arrange racing and other events, have safety boats and provide training for members. Several clubs emphasise that you need not own a boat to learn to sail.

There are several RYA Training Centres in Fife (often dinghy clubs) providing good opportunities to learn to sail at Kinghorn, Elie, St Andrews, Newburgh and Lochore Meadows.

There are plenty places to sail to from Fife – islands, across and up and down Forth, and lots of heritage, things to see and good eateries, etc.

Many Fife harbours have constrained road access, limited parking and limited space for development. Whilst many have slipways, these do not always provide easy access.

With the exception of Anstruther, most Fife harbours have limited infrastructure for sailing/waterborne visitors and also limited scope to secure economic spin off. Even in Anstruther the supporting infrastructure is not good compared to a marina, with only public showers, no drying or laundry facilities and no chemical toilet disposal point.

There are very few sailing/water-based leisure businesses in Fife and if anything this has reduced since the previous study.

There has been some increase in reported visiting vessels since the previous study but it is still fairly modest at around 412 vessels a year, compared to an estimated 341 in 2003.

The traffic transiting the Forth and Clyde Canal has increased slightly since the previous study but remains very modest, typically 120 -150 vessels a year.

Marketing activity is very low key and not coordinated.

East Coast sailing is still suffering from lack of awareness, poor perceptions, lack of marketing and a lack of infrastructure.

There are a number of networking vehicles locally but none of these currently encompass all of the interests associated with Fife harbours.

Anstruther, St Andrews and Tayport emerge from the assessment framework as those harbours presenting the best leisure development potential – the same locations as in the 2003 study.

5.6 What Has Changed Since the 2003 Study?

It is also worth highlighting the things that have actually changed since the previous study and these are outlined below.

There are now more pontoon berths at Anstruther and at Tayport although Tayport has replaced older ones so there is not greater capacity. In St Andrews, plans are well advanced and funding in place to provide at least 20 pontoons later in 2015. Burntisland Sailing Club is keen to pursue the installation of pontoons, subject to negotiations with Forth Ports and securing funding.

During the current audit it was clear that several harbours had more activity and vessels than during the previous audit and it was also apparent that there was more leisure activity, and fewer older small fishing/creel boats.

At some locations there was definitely more activity – e.g. a new wooden jetty has been built at Culross, the Forth Cruising Club has extended to take over Limekilns Town Pier due to demand, St Monans and St Andrews had more vessels than during the previous audit. Dysart has been dredged to provide more berthing capacity within the inner harbour.

In this current study there are an estimated 898 sailing, cruising, and leisure fishing vessels berthed in Fife harbours compared to an estimated 815 in 2003. There has been a small increase in active dinghy club members from an estimated 480 to 505.

Several harbours are now at capacity including North Queensferry, Kirkcaldy, Dysart, West Wemyss, St Monans, Anstruther, Crail and Tayport and some have a waiting list.

More security is evident at many Fife harbours, including CCTV cameras but many vessels were observed in the water in accessible locations with outboards left on.

There have been massive changes at the ports of Kirkcaldy and Methil to the point where they are almost unrecognisable from the previous study. Kirkcaldy has benefited from housing development and the harbour has been subject to significant investment to bring it back into use as a commercial port for Carrs Milling. The area around Methil No 3 Dock has been subject to significant commercial development but the Dock itself remains unused.

The profile of the Fife Coastal Path is higher and more obvious, with more signs and more information boards.

Coastal rowing clubs have been established in many of Fife's coastal communities and this is a new activity that revives an old tradition.

Many clubs have mentioned their ageing memberships and a fear that members will become less able to assist in the maintenance activity required around the harbours.

The expectations of resident and visiting sailors are increasing in terms of safe, secure, and serviced pontoon berths, safe and easy ramped access, and good supporting facilities.

The passenger ferry service out of Rosyth has ceased but the freight service remains. Cruise liners did not really figure in the previous study but activity has probably increased significantly.

Forth Ports Ltd is a significant owner of deep water harbours locally in Fife and is perhaps more positive about leisure activities than during the previous study although always with the proviso that these must not interfere with commercial activity.

There is increased interest from several clubs and owners in making more of the rich local harbour and coastal resource but also recognition that Fife cannot do this in isolation and it needs joint working with other areas on the Forth, and possibly along the East Coast.

The estimated economic impact attributed to leisure sailing and angling activity has increased significantly from £0.55m in 2003 to £1.34m in 2015. Much of this is down to improved baseline spend data but there also appears to be more activity than in the 2003 study.

5.7 Demand, Waiting Lists and Capacity Constraints

It is clear from the research that many Fife harbours are now at capacity and several have waiting lists, with the pontoon berths at Anstruther and Tayport having the biggest waiting lists. Thus it can be concluded that there appears to be good demand in Fife for berthing, especially for pontoon berths and it should follow that if more could be provided then they should be filled relatively quickly.

This premise, however, does not take account of displacement issues e.g. someone moving from elsewhere in Fife to Anstruther or Tayport to secure a more convenient pontoon berth or someone moving to Fife from the south of the Forth to secure berthing at a considerably cheaper cost. Hence it is suggested that whilst there is some demand for berthing in Fife, it is perhaps not as strong as might be suggested by the waiting lists, is probably price sensitive and primarily relates to pontoon berth provision.

The next logical question to ask is - are there any locations that might be appropriate and suitable for the provision of more pontoon berths? However, providing an answer to this question is not easy. The technical constraints of many harbours mean that developing pontoon berths at considerable expense may not necessarily result in increased capacity, and/or berthing charges could increase to a level where they are considerably less attractive to local residents of Fife.

There are few harbours that might prove suitable for the development of pontoons on the scale of Anstruther or Tayport. The east basin at Burntisland could almost certainly provide a good number of pontoon berths but is used commercially and Forth Ports would not wish to see any disruption to this. Methil is another location that many have suggested could prove suitable for a large-scale marina type development in a deep water setting. However, this avoids the issue of the unknown state of repair of No 3 Dock and the security concerns reported by the local club. If feasible, such a project could result in significant, transformational regeneration in physical, economic and social terms for the broader area.

Lastly, there are issues associated with the capital investment that would be required to provide more pontoon berths. Some owners and clubs at Tayport, St Andrews and Burntisland might be in a position to install pontoon berths as long as there was not a requirement for significant amounts of other technical improvements but would probably only be able to proceed with some source of grant assistance. Then there is the question of whether the installation of pontoon berths in Fife makes financial sense i.e. what is the pay back period for the initial capital investment. In this respect it is worth considering that we are told anecdotally that commercial marinas go bust twice before they finally start to generate a profit!

Taking all of these issues into account it is concluded that whilst there may be demand locally for berthing it is not as strong as waiting lists suggest and it is difficult to identify appropriate locations where pontoon berths could be installed cost effectively.

5.8 Strategic Recommendations

Strategic Aim and Priorities

The overall aim of the Fife Harbours Strategy is:

“To grow Fife’s leisure harbour resource, thus securing additional economic benefits locally and enhancing Fife’s tourism and leisure portfolio.”

The research undertaken during the course of this study suggests that this aim can be best achieved by focussing on the inter-related strategic priorities of:

- Partnership working
- Increasing awareness and improved marketing
- Increasing capacity, where possible
- Exploring ways of overcoming tidal harbours
- Improving supporting infrastructure for harbour users
- Capitalising on dry tourism opportunities.

Partnership is the Key

Fife cannot pursue a waterborne leisure (particularly sailing) strategy alone. From a leisure sailing perspective Fife is part of the East Coast portfolio and no matter how good its product or how much it spends on marketing, it is unlikely to succeed in isolation from neighbouring areas. Thus the key recommendation emerging from this strategy is that a waterborne tourism group should be established to cover the wider area – this could be the Forth, the Forth/Tay or the wider East Coast.

The role of this group would be to adopt a more strategic approach to sailing development on the Forth and/or the wider East Coast including networking, improving awareness and coordination, devising a joint approach to marketing, encouraging product development, creating destinations, etc. It could be based on the Sail Clyde model and would be entirely in line with the recommendations in *Sailing Tourism in Scotland 2010* study. It could pursue the three development strands in the recently launched *Marine Tourism Strategy* - Providing Authentic Experiences, Improving the Customer Journey and Building our Capabilities.

Initial approaches to neighbouring local authorities have met with a very positive response and the first step in taking this approach forward is to convene a meeting to discuss the outcomes of the Fife study and discuss how a joint approach could be developed, funded and implemented. *SailScotland*, Scottish Canals and other stakeholders such as RYA Scotland, Forth and Tay Estuary Forums and FYCA should also be included.

Increasing Awareness and Improving Marketing

Currently marketing activity related to Fife harbours is low key at best and non-existent at many locations. A detailed marketing plan requires to be developed, ideally in close association with other areas, including local authorities and other stakeholders with an interest in the East Coast but some suggestions are included below.

- As discussed in Section 4.3, locally only Fife Council is a member of *SailScotland* and pays for a *SailScotland* advert for Anstruther Harbour but it might be possible for one membership to secure wider coverage of other local harbours such as

happens with the Aberdeenshire harbours. Fife Council should explore this with *SailScotland*, ideally in time for the 2016 publication.

- In 2016 the *Welcome Anchorages* publication will be extended to cover the East Coast. This is a free publication, paid for by advertising so harbour owners, clubs and local businesses should be encouraged participate, perhaps by making them aware through the Fife Tourism Partnership website.
- In an effort to secure greater coverage for East Coast sailing in general it is suggested that efforts need be made create stronger linkages to *SailScotland*, for instance encouraging other local authorities and stakeholders on the East Coast to be members, and take adverts. It would also be very useful to seek to secure someone on the *SailScotland* board who can represent the interests of the East Coast, as at the moment the person nominally representing the East Coast is from Inverness.
- It would be useful to develop an *online directory of all Fife leisure harbours* as this is not something that is currently readily available in any one place. Linked to this is the Forth Estuary Forum's project to provide a directory of slipways around the Forth. This could be instrumental in attracting all types of car-borne water leisure users and should be encouraged.
- *Securing press and coverage* and encouraging magazines such as *Yachting Life* to feature Fife and other East Coast harbours also has a role to play in creating and improving awareness.

Increasing Capacity, Where Possible

It is suggested that there is no requirement to provide any additional berths for visiting vessels as many locations already have these allocated or designated and Fife's capacity to accommodate visitors is not an issue or constraint.

Whilst the development of more berths for residents may be desirable, it is concluded that there are few locations where it will be possible and/or cost effective to significantly increase capacity. However, given the potential economic benefit that is estimated to accrue from resident berths (see Section 5.2), increasing the capacity overall in Fife should be encouraged.

As discussed in Section 5.7 above, there are two locations that could potentially prove suitable for the development of a marina type development –, Burntisland, and No 3 Dock, Methil. Neither of these is without challenges and such projects are likely to prove costly to deliver and are potentially longer-term rather than immediate projects.

Overcoming Tidal Harbours

As highlighted throughout this study, the impact of the tidal and drying nature of most of Fife's harbours is a key constraint to development – both in practical terms and from the perspective of attracting additional users and visitors.

Two ways of overcoming the tidal constraints have been identified during the course of this study. The first is to target those harbours that can provide all tides access and ascertain whether it may be possible to provide a small number of leisure berths to accommodate visiting vessels.

- Burntisland Sailing Club is pursuing plans to provide pontoon berths in the East Dock and if this can be implemented it could provide a great boost to sailing on the Forth/East Coast and hence should be encouraged and supported.
- Pittenweem has been mentioned by several consultees as another location that could potentially provide much needed deep water leisure berthing. Whilst it is acknowledged that Pittenweem is Fife's key fishing harbour, it is suggested that consideration should/could be given to ascertaining whether it might be possible to designate one space (or perhaps two) to accommodate larger fin keeled visiting vessels. This could be piloted initially to ensure it was feasible without interfering with the operations of the fishing fleet. The proposal is to accommodate visiting vessels only, not provide permanent leisure berthing but it is acknowledged that this suggestion may not be supported by the commercial fishing interests.

The second way of overcoming tidal harbours is to provide offshore moorings at suitable locations close to selected harbours. Again this has been suggested by several consultees and the costs are estimated as £1,000 and £1,500 for the supply and installation of individual mooring buoys and less for a trot (row) of buoys. Buoys would require inspection and maintenance, with anchors and bottom chains lasting 20 years, and riser chains renewed every 2 years, and the cost per year is estimated as £100 - £200 for each and there would also be the annual charge to Crown Estate for the moorings. Locations suggested as potentially suitable include Anstruther, St Monans, St Andrews and Dysart. There are, however, concerns about the safety and security of offshore moorings in such exposed locations but it should be appreciated that these would only be used for short term stays in good weather and could also provide emergency moorings if required. Again this might be something that could be tested on a pilot basis at carefully selected locations.

Improving and Developing On-shore Infrastructure

There are visitor berths reserved or available at many locations and it is clear that visitors are welcome. However, the research during the course of this study indicates that Fife only attracts very modest numbers of visiting vessels from around the Forth and from further afield. Adopting a more pro-active approach to marketing will, hopefully, be instrumental in increasing visiting vessels but this must be underpinned by the expected supporting infrastructure if it is to deliver the experience promised in the marketing material.

As highlighted in this study, the supporting on-shore infrastructure is generally limited at Fife's harbours and does require to be improved. It is suggested that the three locations identified as having the best leisure potential should be prioritised as far as improved on-shore infrastructure is concerned i.e. Anstruther, St Andrews and Tayport.

- In Anstruther efforts should be made to extend the on-shore offer to include dedicated toilets, showers, a secure drying room/laundry, chemical toilet disposal point and wi-fi. It might be worth exploring if this could be achieved through a partnership with the sailing club, as it currently has no premises.
- At Tayport and St Andrews, Fife Council should work in partnership with the owners to try to improve and develop at least some supporting infrastructure.

Tayport may have now secured funding for a small toilet/shower module and this might prove a suitable funding model for other locations.

The other way to deliver supporting infrastructure is to encourage those clubs that do have good clubhouses to adopt a pro-active stance to encouraging more visitors who can then access their secure clubhouse facilities, especially if access is by means of a key code. The clubhouses at Forth Cruising Club, Dalgety Bay, Aberdour, Burntisland, Elie, and St Andrews Sailing Club might all be candidates to be part of such an initiative but it must be recognised that clubs may have security concerns.

Dry Tourism

Whilst it is impossible to quantify, Fife's harbours are an important asset in Fife's overall tourism portfolio. People are attracted by the spectacle of a busy harbour and many like to walk around Fife's historic harbours, including the main working fishing harbour at Pittenweem. Linked to this is the opportunity to buy and eat locally caught produce and there is scope to develop this further.

There is also potentially scope for the development of events associated with harbours but with a wider appeal than just the sailing community.

People are also attracted to photograph and paint Fife's harbours. In the 2003 it was suggested that a painting/photography harbour's trail could be developed and this suggestion is offered again – probably as an online only resource and possibly linked to Fife's Coastal Path this could be instrumental in encouraging dry tourism visits to Fife's harbours.

Many of Fife's harbours are of historic significance and interpretation should be provided to aid visitor's understanding of this.

As discussed in Section 2.6 there are issues related to parking and access at several beach locations that will suffer from congestion at busy times. Whilst it is not strictly speaking part of this study, it is suggested that it could be useful to try to identify the scope to provide increased parking for beach users at locations such as Aberdour (west), Kinghorn, Lower Largo and Elie.

5.9 Fife Wide Recommendations

A Fife Harbours Forum

Whilst it is clear from Section 2.9 that there are several forums and groups that encourage networking between Fife harbour owners and users, it is also apparent that there is no one forum that covers everyone. Whilst no-one wants to establish groups without a purpose, it is suggested that there could be mileage in holding occasional networking meetings for Fife harbour owners, clubs and users. This could potentially be organised by Fife Council or perhaps it could/should be extended to all owners, clubs and users around the Forth and Tay and be organised jointly by the Forth and Tay Estuary Forums. Initially, this study provides a reason to convene such a meeting so that consultees can hear about the findings and recommendations.

Recording Visiting Vessels

It is clear from consultations that only a very few places make a point of accurately recording visiting vessels, where they are from and where they are going. Encouraging all harbours to keep records was a recommendation in the 2003 study but is made again as providing evidence means it is easier to make the case for investment to attract more visiting vessels.

Ownership and Leases

Harbour owners which lease to clubs/user groups should be encouraged to consider offering long leases of 20-25 years as this will then enable clubs/users which wish to improve facilities to access grant assistance more easily.

Locations where there is interest in a community trust or similar taking on a long lease or ownership of a harbour should be encouraged as this is likely to result in a more proactive approach to maintenance and development. In this respect it will be interesting to see how this approach progresses at North Queensferry and whether this might be a model that is appropriate at other Fife Council harbours. A management arrangement has been in place at Aberdour for over 60 years and appears to work well for all parties.

Charges, Income and Expenditure

Charges at Fife harbours are generally modest, reflecting the limited infrastructure and the desire at some locations to keep sailing activity affordable. However, it is important to be realistic about what it costs to maintain the harbour, run the club, etc and owners and clubs should be encouraged to adopt a more business-like approach to their finances. This is already happening at some locations, although it is acknowledged that it is challenging to secure the income required to maintain historic harbours through berthing income alone.

The charges levied at Fife Council's harbours are also fairly modest and although it would likely meet with local resistance, Fife Council should consider reviewing its charges and concessions to help narrow the gap between income and expenditure at its own harbours.

There may be scope for Fife Council to secure more income through its harbours by making more imaginative use of the land around harbours and beaches e.g. beach huts for beach users, accommodation pods for Coastal Path users, etc. At Cellardyke where there is only very limited activity and income, is there an alternative use to leisure, e.g. could it be used to grow and harvest seaweed commercially?

Events

Aside from club regattas and dinghy events there are few water related leisure events in Fife. As discussed in Section 3.5, efforts should certainly be made to attract the St Ayles Skiff World Championships to Fife in the future which could be strongly promoted as a form of homecoming for this activity in the Fife context.

FYCA should be encouraged and supported in its efforts to extend the appeal of the East Coast Sailing Festival.

The organisers of the Anstruther Harbour Festival should be encouraged to develop their ideas for extending its appeal, but the view of Fife Council's Festival Development Officer is that professional support is required to do so. Other harbours including St

Monans, and St Andrews could be encouraged to develop events associated with their harbours and/or to ensure harbours are fully incorporated into existing festivals and events as appropriate.

Organisers should be made aware that their events can be publicised on the *SailScotland* website.

Close contact should be maintained with EventScotland in relation to major events that could be attracted to and hosted on the Forth and/or the Tay.

5.10 Recommended Action at Specific Locations

The table below outlines the recommended actions at specific harbour locations. These are provided in order of priority related to their potential for increased leisure use. Note not all locations are included as at some harbours no specific recommendations have been made.

<p>Anstruther Recommended Action</p> <p>Improve the supporting infrastructure for harbour users and visiting vessels – drying room, washing machine, chemical toilet disposal, internet access, etc. Explore whether this may be possible in partnership with the sailing club.</p> <p>Investigate the possibility of establishing a safe deep water offshore mooring in the vicinity of Anstruther Harbour. This would be a relatively cheap way of enabling larger and single fin vessels to use Anstruther but it may prove challenging to find a suitable, safe and sheltered location.</p> <p>It had been suggested that cutting permanent steps into Anstruther Harbour would be very helpful in facilitating easier access to the <i>Reaper</i>, the historic herring drifter owned by Scottish Fisheries Museum and moored in Anstruther Harbour. However, it has been decided that a more feasible solution would be the installation of a floating landing stage with a pedestrian access ramp – Fife Council should give every assistance to the Fisheries Museum toward securing grant funding for this.</p>
<p>St Andrews Recommended Action</p> <p>Encourage and support the Harbour Trust in its efforts to improve the harbour and its supporting infrastructure.</p> <p>Better signing of the harbour from the town centre.</p>
<p>Tayport Recommended Action</p> <p>Encourage and support Tayport Harbour Trust in its efforts to improve its supporting infrastructure.</p> <p>The area around the public car park/harbour could be more of a focus for the town.</p>
<p>Burtonisland Recommended Action</p> <p>Owners/occupiers should be encouraged to tidy the site.</p> <p>Sailing Club should be encouraged with its proposals to provide pontoon berths in the East Dock as this could be instrumental in attracting more visiting vessels as it is a deep water harbour.</p>

Limekilns and Brucehaven Recommended Action
Broomhall Estates should be encouraged to consider granting the Club a longer lease as this would enable it to potentially secure external sources of funding as the short term lease is currently a barrier.
Aberdour Recommended Action
Knock down the old toilets as they are an eyesore.
St Monans Recommended Action
The local regeneration initiative/group should be encouraged in its efforts to secure local economic benefits from the harbour area.
North Queensferry West Harbour Recommended Action
West Harbour needs a tidy up and clear out of old/unused vessels but it is understood that quite a bit of boat building and repair takes place within the club membership. It is assumed that the Community Trust has its own ideas for the harbour area and will take a pro-active stance to moving forward with improvements and possibly new developments.
Review and replace NQ visitor info boards.
Dysart Recommended Action
Currently very high capital costs (£6m or more) are being mentioned in relation to repairs and works at Dysart Harbour. However, it is suspected that this figure relates to the complete restoration works proposed through the Dysart Townscape Heritage Initiative and not to the necessary repairs to ensure Dysart Harbour remains safe and useable. It would be extremely helpful to gain a more meaningful estimate of necessary (or urgent) repairs and it is understood that Fife Council Transportation Service currently has this in hand.
Also related to Dysart Harbour is the closure of the popular Sailors Walk due to coastal erosion and it is understood that a technical study is underway (commissioned by Fife Council) to consider remedial works to enable the route to be re-opened.
West Wemyss Recommended Action
The suggestion of a community trust being established to take over the harbour should be encouraged as this should enable access to grant sources that are currently not available to the club due to there being no formal lease.
No 3 Dock Methil Recommended Action
This location would benefit from the development of new master plan, part of which could consider the potential for a mixed use development, including housing, leisure and recreational and the use of No 3 Dock. Such a development could potentially secure significant local regeneration benefits.
Kirkcaldy Recommended Action
Encouraging Forth Ports to give the club a longer lease might help it to develop further and secure external funding.
Crail Recommended Action
The community group interested in redeveloping the Harbour Master's Office building as a small visitor centre should be encouraged to develop this project as it will provide added interest for dry tourism visitors to the harbour.
Pittenweem Recommended Action
The upper floor of the fishmarket at Pittenweem Harbour is virtually unused and was identified during the course of this assignment as possibly being suitable for a new leisure-related use to support the local economy. It is known that an options appraisal of the fishmarket was undertaken in 2001 and identified some constraints to using the

building. It is suggested that this study should be revisited with a view to exploring possible leisure-related uses that could support the local economy e.g. a fish restaurant.

Consider whether there could be scope to welcome more visiting leisure vessels by accommodating them in the east basin – in good weather and short term only as this is a relatively exposed location and/or accommodating 1-2 leisure berths for visiting vessels only in the inner basin located so as not to interfere in any way with the commercial operation of the working harbour. This could be instrumental in attracting more visiting vessels to Fife as it would be suitable for larger, single keel vessels.

The Coastal Rowing Club has highlighted concerns re the outer basin slip and Fife Council should consider whether it requires remedial works.

Review the provision of visitor info and signage around the harbour and consider renewing it.

Lower Largo Recommended Action

Encourage the owner to repair the pier which is now closed off to the public. She has indicated that she wants to do so but lacks the resources. Put her in touch with the FC funding team although as a private owner it may be more difficult to secure funding than a club or trust. The Marine Stewardship Fund might be applicable here, particularly if the sailing club could be involved.

Charlestown Recommended Action

It is not responsible to encourage leisure sailing use here due to the poor condition of the harbour and the surrounding residential area but at the very least the harbour owner should be encouraged to tidy it up.

Kinghorn Recommended Action

Tidy up or knock down the derelict shop on the front as it detracts from the environment.

Pettycur Recommended Action

Community Council should be encouraged in its interpretation project, and signposted to Awards for All or similar for grant assistance.

Culross Recommended Action

Development of interpretation near the pier re the importance of Culross as a port - salt?

Newburgh Recommended Action

No public toilets in Newburgh - the start/end of the Coastal Path – explore if and how this can this be rectified.

Inverkeithing Recommended Action

The harbour area could be tidied up but as surrounding area is not particularly attractive, tidying the harbour area will have only limited impact. Should be considered in context of broader regeneration activity in the Town Centre and South East Inverkeithing area.

Cellardyke Recommended Action

Explore and consider whether an alternative income-generating use could be devised for Cellardyke as it secures very limited income currently.

Wester Anstruther Recommended Action

Make more of a feature of the stepping stones for locals and visitors.

Kincardine Recommended Action

Start/end of the Coastal Path, there should be publicly available toilets in Kincardine. Can this be pursued through Fife Council's Comfort Scheme or Fife Coast and Countryside Trust?

Better signs for river front walks, etc, locals probably know but visitors will not.

Newport Recommended Action

Introduce a 20 mph speed limit here as cars come down the hill very fast.

Encourage the re-use of old ferry terminal buildings.

Appendix 1 Contacts
Strategic Study of Fife Harbours

Name	Organisation	E-mail, Website, Tel No
Local Authorities		
Alison Laughlin	Fife Council	Alison.laughling@fife.gov.uk
Ann Camus	Fife Council	Ann.camus@fife.gov.uk
Ian Mccrory	Fife Council	Ian.McCrory@fife.gov.uk
Moir Gibson	Fife Council	Moir.Gibson@fife.gov.uk
Nicholas Williamson	Fife Council	Nicholas.Williamson@fife.gov.uk
Chris Wragg	Fife Council	Chris.Wragg@fife.gov.uk
Helen Manzie	Fife Council	Helen.Manzie@fife.gov.uk
All Fife Council Harbour Masters	Fife Council	Tom.fyall@fife.gov.uk smith.p.smith@btinternet.com donald.low@fife.gov.uk bob.abercrombie@fife.gov.uk tormod_185@hotmail.com
David Wright	Aberdeenshire Council	David.Wright@aberdeenshire.gov.uk
Hilary Tasker	Angus Council	TaskerH@angus.gov.uk
Kyle Drummond	City of Edinburgh Council	kyle.drummond@edinburgh.gov.uk
Jennifer Caswell	Dundee City Council	Jennifer.caswell@dundeecity.gov.uk
Susan Smith	East Lothian Council	ssmith@eastlothian.gov.uk
Kirsty Preston		kpreston@eastlothian.gov.uk
Alan Graham	Perth and Kinross Council	AGraham@pkc.gov.uk
Other Organisations		
Pauline McGrow	Contact for Cross Party Parliamentary Group	admin@ryascotland.org.uk
Nadia Cesari	EventScotland	Nadia.Cesari@eventscotland.org
Robbie Blyth	Fife Coast and Countryside Trust	Robbie.Blyth@fifecountryside.co.uk
Lorraine Bell	Fife Historic Buildings Trust	fife.hbt@btconnect.com
Bill Hughes	Fishermen's Mutual Association	admin@kingdomseafood.co.uk
Frances Edwards	Forth Estuary Forum	frances.edwards@forthestuaryforum.co.uk
Stuart Wallace Divisional	Forth Ports Ltd	stuart.wallace@forthports.co.uk

Director Scottish Operation		
Andy Carnduff	Forth Yacht Clubs Association	acarnduff@btinternet.com
George Scrivener (also Forth Cruising Club)		george_scrivener@hotmail.com
Ian Heigh	Network Rail	ian.heigh@networkrail.co.uk
Liza Linton	Royal Yachting Association of Scotland	liza.linton@ryascotland.org.uk
Robin Paris		robin.paris@ryascotland.org.uk
Graeme Russell		
Daniel Steel	SailScotland	daniel.steel@sailscotland.co.uk
Alistair Smart	Scottish Canals	Alistair.smart@scottishcanals.co.uk
Ian Napier	Scottish Federation of Sea Anglers	01592 591882
Steve Bastiman	Scottish Sea Angling Conservation Network	http://www.ssacn.org
Laura Booth	Tay Estuary Forum	L.M.Booth@dundee.ac.uk
Paul Bancks	The Crown Estate	Paul.Bancks@thecrownestate.co.uk
Tom Piper		Tom.Piper@bidwells.co.uk
Manuela Calchini	VisitScotland	manuela.calchini@visitscotland.com
David Adams McGilp		David.AdamsMcGilp@visitscotland.com
Clubs, Owners and User Groups		
Camilla Garret Jones	Culross	camilla@culrosspottery.com
David Washer	North Queensferry Boat Club	david.a.washer@live.co.uk
Iain Mitchell	North Queensferry Community Trust	igmitchell@easynet.co.uk
Lucie Macaulay		nq.community.trust@gmail.com
David Williams	Dalgety Bay Sailing Club	treasurer@dalgetybaysc.org
Roy Marrian	Aberdour Pier and Harbour Committee	Roykathleenmarrian@hotmail.com
Richard Drummond		richarddrummond45@gmail.com
Robert Milne	Kinghorn Sailing Club	kinghornsc@hotmail.co.uk
Lorraine Innes	Briggs Marine	
Bill Archibald and other Committee members	Burntisland Sailing Club	bill.archibald1@gmail.com contact@burntislandsailing.org.uk

James Jack	Kirkcaldy Boating and Sea Angling Club	ijack@blueyonder.co.uk
Bill Shields Jan Williams John Tabor	Dysart Sailing Club	jab.williams@talktalk.net john-tabor1@hotmail.co.uk
Iain Anderson David Gane	West Wemyss Boating Club Wemyss Estates Representative	01592 655807 dgane@savills.com
Scott Harper	Methil No 3 Dock	scott@bracklinn.plus.com
Scott Greer	Methil and Fairway Boat Club	Methil Fairway Boat Club, The Docks, Methil, Leven, KY8 3RE. Phone: 01333 421110 No website found.
Lesley Dykes – Crusoe Hotel	Lower Largo Harbour	relax@crusoehotel.co.uk
Peter Malcolm	Largo Bay Sailing Club	peter@pmalcolm.co.uk
David Pattullo	Elie Harbour Trust Ltd	dpattullo@btconnect.com
Forrester Adam	Elie and Earlsferry Sailing Club	info@eesc.org.uk
Gordon Bell	St Monans Harbour User Group	gordonbell@theretailer.co.uk
Robin Bremner	Pittenweem Rowing Club	robinbremner@gmail.com
David Tod	Anstruther Fishing Rep	tods2@tiscali.co.uk
William Kennaway Cairns Birrell	Anstruther Sailing Club	william.kennaway@btopenworld.com cairns@enpd.co.uk
Alex Gardner	May Princess	www.anstrutherpleasurecruises.co.uk
Bernie McConnell	Crail Harbour Users Group	bm8@st-andrews.ac.uk
Jack Jarvis		jj@st-andrews.ac.uk
Cameron Rae Brian Paterson	St Andrews Harbour Trust	c.f.rae@btinternet.com bjp1958@cleeveys95.freemove.co.uk
Ken Sweeny		kensweeney18@gmail.com
Pat Dodds	Harbour Café St Andrews	patandbill239@gmail.com
Julie Frankle – phoned on behalf of club	St Andrews Sailing Club	commodore@stasail.com

Chris Dawes	Tayport Harbour Trust	chrisdawes@aol.com
Liz Anderson	David Anderson Marine Ltd Newport	lisbethanderson@aol.com
Caroline Gallacher	SNH (Isle of May)	nnr@snh.gov.uk
Douglas Wilson	Historic Scotland (Inchcolm Island)	douglas.wilson@scotland.gsi.gov.uk
Roger Pickering	Contacted as a result of press release	office@forthpilgrim.org
Derek Robertson	Contacted as a result of press release and was concerned about the condition of Balmerino Pier – tried to establish ownership but could not.	derekart@btinternet.com
Richard Ware Fiona Ware	Contacted as a result of press release	richard.ware56@gmail.com fiona.ware57@gmail.com
Charlie Marshall	Seabird Centre, North Berwick re passenger service between North Berwick and Anstruther	fundraiser@seabird.org
Emelda Maclean	Possibly links between Crail Harbour and project at Crail Airfield	emelda@emacplanning.co.uk
James Simpson	Concerned about Lower Largo	jim@simpson-katie.freereserve.co.uk
Difficulty in Contacting and/or No Input Received		
Broomhall Estates	Charlestown and Limekilns	Phone: 01383 872344 No website or e-mail address. Phoned several times and left a message but no-one returned calls.
Wormit Boating Club		ellis@ellisarmstrong.wanadoo.co.uk E-mailed several times got a holding reply but not a full response.
Newburgh Community Trust		http://www.newburghct.org.uk/

		Website but no phone number or direct e-mail address. E-mailed twice through website but no response.
Newburgh Sailing Club		secretary@newburghsailingclub.org icameron1952@hotmail.com E-mailed several times to two different addresses but no response
Mr Wilson	Cruise Forth	greenmount@btinternet.com E-mailed several times but no response.
Colin Aston	Re passenger service between North Berwick and Anstruther	colinaston@talktalk.net
Kate Pearson	Scottish Borders Council	kpearson@scotborders.gov.uk Phoned several times but did not manage to speak

Appendix 2 Consultation Pro-formas

Checklist of Topics for Discussion with Owners

Ownership and type of owner – Fife Council, private, Trust, organisation, club, etc?

Extent of ownership – only harbour/structure or any surrounding land and/or properties?

Current type and level of use?

State of repair?

Is there a regular/annual maintenance regime and what does it cost?

Extent and cost of any remedial works required?

Availability of resources to undertake remedial works?

Any leisure activity currently – leisure in its widest sense not just sailing

- What
- How much
- Who (locals or visitors),
- Waiting list
- Is there a club
- Current leisure facilities/resources and who owns and manages them.

Visitors – numbers and where are they from, type of vessels, how long do they stay, is a record kept?

Income generated as a result of leisure activities – berthing or user fees, visitor charges, parking, etc?

Overview of annual income and expenditure

Economic impact locally and scope to increase this?

Will leisure activity become more important in the future?

Operational issues that prevent leisure sailing or other leisure activities being developed – incompatible, military, conservation, state of repair, local residential environment, etc?

Long term ambitions – what would you like to see happen, does this include any leisure activity, your resources, any previous feasibility work done?

Problems/issues associated with increasing leisure use?

Scope for accommodating pleasure boats/small passenger services?

Views on East Coast leisure sailing?

Checklist of Topics for Discussion with Clubs and Other Operators

Club/Operator

When established
What type of sailing or other activity?
Type of activities – racing, training, events, etc
Current facilities
Current resources

Members

How many members
Type of members – local, further afield, age
Waiting list

Income and Expenditure

Annual club fee
Berthing fee – to club/operator or harbour owners
Club house income
Income from visitors
Approx annual expenditure

Location

How much use
What facilities do they have?
What facilities are lacking (and really need to be developed)
What would they like to see developed in the near future
Long term ambitions
Do visitors use?
Do they do anything to encourage visitors?
Where do visitors come from, do they keep a record?
Scope to accommodate pleasure boats/small passenger services?
Local economic impact and scope to increase this?

Demand for Secure Berthing

Is there a demand for more safe, secure berthing?
Pontoon type?
Demand from visitors?
Level of berthing charge?
Scope for a Fife marina type development – demand, location?

Views on Fife and East Coast Sailing in General

Issues and constraints
Demand for more facilities
Will drying harbours always be a disincentive?
Could/should the East Coast become more developed for leisure sailing?
What could be done to increase activity and stimulate demand?