

LOCHBOISDALE HARBOUR EVALUATION OF EXISTING PROVISION AND FUTURE OPPORTUNITIES

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Stòras Uibhíst

*Going Forward
Together*





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EXECUTIVE SUMMARY

This report aims to provide a baseline study on existing provision at Lochboisdale harbour in South Uist. This report identifies the key issues in relation to provision at Lochboisdale pier, including the constraints in meeting:

- The current demand of users
- The unmet demand of existing users
- The constraints to new developments
- The constraints to growth.

We have considered the existing uses of the pier facilities and the existing needs of the users and their desire for further facilities.

The report concludes that the existing harbour provision does not meet the demands of existing users in any area – specifically:

- Onshore ferry services
- Fisheries
- Leisure sailors
- Local community
- Pedestrians
- Business opportunities

There is significant pent up demand for development within Lochboisdale harbour, the report highlights areas of opportunity in the tourism fishing, local services and businesses and community sectors. There is demand within the local area for provision of facilities to enable local people to take advantage of the opportunities.

However this potential for growth is critically undermined by the restriction on enlargement within the site currently in operation, and the restraints on movement within the site. No single users' development needs could be met through expansion or enhancement without causing significant detriment to all other users.

There is no scope for expansion, enhancement or development within the constraints of the existing pier area.

The costs of one user group expanding into the areas outwith the existing pier area would be prohibitive to a single interest and therefore has not been done previously. It is impossible to identify one group whose needs would take priority over any other.

The only option for enhancement is to facilitate development of all the existing users at one time, thereby allowing each area to reach its potential in terms of productivity, profitability and economic growth, without consequently hindering another area.

A full scale facilitated development would take advantage of the opportunity to create an aspirational, regionally significant development which would have an impact on local, regional and national GDP and transform the economy and social fabric of the community of South Uist and the Western Isles.

The Lochboisdale regeneration plan will achieve impacts in reducing the inequality of the economic and social performance of South Uist and the Western Isles, compared to Scotland as a whole. It will enable Lochboisdale to build on existing provision and realise its full economic potential through improved efficiency, higher value-added contribution and greater access to national and international markets.

There is extensive scope for private, public and third sector investment in a Lochboisdale waterfront development, through facilitated development.

The private and third sector investment and development will not be realised unless the initial infrastructure is delivered at public sector expense. The leverage on this initial investment could be as high as 1:20.

Stòras Uibhist is a high growth company that has the capacity to deliver a facilitated development of this scale, and as such is exceptional in community regeneration terms.

BASELINE AND OPPORTUNITIES

There are a number of issues affecting the existing Lochboisdale harbour area and limiting its scope for future service delivery and development.

Current issues:

- 3.5m Draft restriction on entrance
- Single berth pier for large boats
- Constrained fisheries pier
- Lack of fisheries infrastructure
- Lack of pontoons for leisure craft
- Lack of space for pontoon provision
- Limited shore side facilities for leisure craft
- Limited shore side space for development
- Limited economic impact of existing facilities

These constraints have played a fundamental part in considering a development proposal for Lochboisdale harbour. In particular, the lack of available space within the current harbour design means it is difficult to develop facilities for the visiting leisure craft market.

The harbour was therefore considered in its broadest range to determine how best to tackle the constraints and provide facilities which meet the requirements and aspirations of all current and future users.

The aspiration of any development within Lochboisdale harbour area would include:

- Enhance the visual amenity of the area
- Develop an aspirational port of entry for the Outer Hebrides
- Provide a suitable pier to allow maximum vessel usage by ferry operators
- Provide pier, marshalling area and waiting facilities appropriate to the scale of requirements for RET serviced existing and potential routes from Lochboisdale
- Provide increased access to fisheries pier, maximising economic impact of fishing
- Provide enhanced fisheries related developments, maximising economic impact
- Provide a safe anchorage within Outer Hebrides for leisure craft travelling from west coast of Scotland (e.g. Oban)
- Provide West of Hebrides access for leisure craft
- Develop a berthing facility for yachts in the Outer Hebrides
- Provide appropriate shore facilities for leisure craft
- Developing a vision for the South Uist area including the exploration of a community-led partnership approach
- Improvements to the social amenity of the area

- Provision of suitable, mixed housing solutions for South Uist
- Further economic development in the South Uist area including assistance to local entrepreneurs.

The area available within the existing port facility limits of Lochboisdale does not allow for even the most critical elements of the enhancements to proceed.

Therefore, a key element of the rationale for development is consideration of the option to expand outwith the existing confinements of the Lochboisdale port area to allow improved access and facilities for all key user groups.

In drawing up a development plan, consideration was made of previously compiled reports and studies, ongoing consultation with interested bodies and the critical development mass required to make the project viable.

Discussion of the main points of consideration are below and significant other reports are attached.

SITE DESCRIPTION

Lochboisdale Harbour

Lochboisdale harbour is situated at the end of the A865 road on South Uist. (see map attached.)

The landward area of the harbour is defined by a row of flats and shops culminating with the ferry terminal and Lochboisdale Hotel. There is a plan for a similar sized block of flats to be built to fill the remaining empty area. The flats sit over the shops which comprise a butcher and general store, small clothing shop and offices and a training facility. The police station which is manned part time is in the middle of this group.

The harbour is enclosed by the A865 road which represents the main traffic route to the front of the shops and flats leading to the ferry terminal marshalling area. To the rear of the residential properties are the agricultural mart pens and auction area and Lochboisdale Hotel.

At the head of the harbour there is the small parking area for 4 cars outside the tourist information office with a small public garden behind it.

Whilst the existing Lochboisdale urban area is located in a compact area on one shore of the loch itself, the overall location is an enclosed bay where there is significant undeveloped land (currently rough pasture), which is not in crofting tenure. This area is accessible from the existing development at low tide, which is land under ownership and control of the community company Stòras Uibhist.

The natural bay, which is 185.43 meters at its widest point, is tidal with a draft restriction of 3.5m on the approach to the Calmac ferry pier. This narrow, shallow bay limits the size, number and time boats can use it. This draft limit also impacts on the whole CalMac fleet and reduces efficiency and sailing speed of the majority of West Coast ferries as a result of all boats being built to allow for the Lochbosidale draft limit.

The harbour and bay accommodates fishing vessels, commercial vessels and leisure craft within its deeper water, as well as the Calmac ferry. The harbour area has two main sections, one for ferries and the other for light commercial boats and leisure craft.

The first part (A), has Quayside access and a small slipway for fishing boats. There is vehicular access along the full length of the 75m fishing harbour which is used by waiting buses and as a ferry queue overspill area and marshalling area for lorries. The tenders for the boats anchored in the bay along the quayside in this area. There is space for a maximum of two boats to tie up alongside the quay.

The fishery quay is cramped and not enclosed or protected, with fishing debris, ropes and creels making it hazardous for pedestrians and young children.

Area (B), the ferry terminal and marshalling area, has limited space for ferry traffic marshalling on the pier. In the peak summer season, and on sheep and cow sale days, the ferry traffic

overflows onto the street and down the side of the fishing harbour, which also has to accommodate the commercial traffic.

There is no long stay parking at the ferry terminal or elsewhere in Lochboisdale. There is limited parking outside the hotel, butchers, row of shops and tourist information office which is inadequate for these businesses' customers. This congestion is not safe for pedestrians or visually appealing.

The main pier is single berth only and restricts the potential for commercial shipping to use Lochboisdale Harbour to times when no ferry is berthed, or expected. Introduction of the Lochboisdale-Mallaig ferry service will seriously increase this restriction.

FERRY PIER

Ferry Provision

Lochboisdale is currently served by a ferry link to Oban, which forms a triangular route with Castlebay in Barra. The current ferry links from South Uist are limited to three direct sailings a week to Oban and two additional in-direct sailings. Journey times are up to 7½ hours.

The pier provides a single berth pier giving access and berthing to the main ferry through a linkspan located parallel and contrary to the main marshalling area. The ferry has priority access for the pier, and frequently requires other boats to move from the pier whilst in berth.

Caledonian MacBrayne operate the ferry, on behalf of the Scottish government, serviced by boats leased from Caledonian Maritime Assets Lt. (CMAL).

Entrance to the ferry pier is restricted to boats with a 3.5m draft. The draft restriction on the entrance to the mouth of the ferry currently places a restriction on all boats in the CMAL fleet, making them inefficient and costly to operate. Removal of this draft restriction and consequent impact on the design of the CMAL fleet could save £2 million per year, due to efficiency savings, as boats are replaced.

The marshalling area for the ferry is severely restricted causing traffic problems around peak ferry times. There is limited provision of short stay parking. There is no lorry parking, or turning areas to assist in the loading of large vehicles. The design of the Pier is highly inefficient, as the slipway runs parallel and contrary to the marshalling area.

There are no long stay parking facilities available at Lochboisdale pier.

Caledonian Maritime Assets who currently operate the existing pier, would seek to make improvements to the existing layout. (see harbour empowerment application) CMAL own a very limited area surrounding the pier layout, and the seabed. CMAL have indicated in discussions with Stòras Uibhist they would relocate a potential investment if they had confidence that the infrastructure surrounding the new pier location would be supplied as a separate entity.

CalMac Ferries have indicated significant interest in using a completely new pier facility if one were available.

RET:

On 26 February 2008 Stewart Stevenson, Minister of Transport, Infrastructure and Climate Change announced that a Road Equivalent tariff pilot exercise would commence on 19 October 2008, the pilot exercise would feature all the Western Isles to mainland routes and also include services to Coll and Tiree.

This will impact on the fares and usage of the Lochboisdale ferry.

Oban-Lochboisdale Ferry Route:

Current Passenger price	£18.75
RET passenger price	£10.95
Current car price	£68.50
RET car price	£58.69
CVs current price	£323.83
CVS RET Price	£212.75

The Scottish government have identified a number of likely RET impacts to be evaluated during the pilot phase:

- Reduced commercial transport costs; a number of consultees suggested that this would lead to an increase in competitiveness, compared to mainland competitors, though some noted fares are a small percentage of total transport costs.
- Increase in demand and output, resulting in higher levels of employment and improved economic performance in general.
- Increased exposure of local retail businesses to mainland based competition. Population; An independent Study for Comhairle nan Eilean Siar entitled the Outer Hebrides Migration Report identified the cost and availability of transport as a key driver of population change.

Proposed Ferry Discount Scheme: Research for HITRANS identified numerous potential social impacts;

- Allow increased social interaction with family and friends on the mainland;
- Provide cheaper access to specialist services and facilities on the mainland which are not available on the islands.

- Increased travel opportunities for those on lower incomes and/or with families for whom the ferry will remain more affordable than air services, even with the Air Discount Scheme;
- Meet the increasing expectations of mobility/transport services which are prevalent not only in the Outer Hebrides but throughout Scotland;
- Allow increased interaction between groups, societies and sports teams based in the islands and those on the mainland;
- In sum, allow greater participation of island residents in Scottish society by reducing travel costs to a level closer to those of mainland communities.
- One of the main benefits of lower ferry fares identified by a number of consultees was the positive impact it would have on tourism.
- It is anticipated that the reduction in fares would make holidaying in the Western Isles a more attractive proposition and lead to a greater number of visitors to the islands.

Whilst the current benefit levels in terms of fare reduction to Lochboisdale are not as extensive as they are in other areas, the increase in travel and economic benefits is expected to have a positive influence on the area.

The current restrictions in the facilities, space, parking and amenity of Lochboisdale harbour are unlikely to be sufficient to deal with this increase in travel. Upgrade of the harbour facility will be required to meet the needs of delivery, however the present location does not allow for this increase.

The increase in travel is likely to have a significant impact on the boats used to service the routes, currently leased by CalMac from Caledonian Maritime Assets Ltd. (CMAL) Removal of the 3.5m draft restriction would enable CMAL to take full advantage of design specifications which would reduce overall running costs, improve efficiency and cut carbon emissions.

Proposed Lochboisdale-Mallaig Ferry Service

Stòras Uibhist are currently working with the Scottish Government on implementation of a Lochboisdale-Mallaig ferry, operating a twice daily service. This service would be popular with local hauliers as it reduces driver hours and fuel costs to the central belt from the Southern Isles.

The proposal delivers a service that meets the needs and aspirations of the business, tourism and domestic sectors, not currently met with the Lochboisdale-Oban service, by offering sailing times that:

- Allow commercial traffic to be in the Central belt in one day to connect with onward transportation to the South and the Continent, with a return to Uist on the second day.
- Allow tourists to arrive on Saturday and Sunday evenings for dinner and also leave after breakfast on the following Saturday or Sunday.

- Allow island residents to leave after work on a Friday and return on a Sunday evening, giving access to services and facilities not otherwise available. This is particularly important to the 16-29 age group that is in critical decline.
- Proposed fares of: Passenger £15, Car £45, CV £150.

RET and Lochboisdale-Mallaig:

The benefits of RET to South Uist whilst anticipated to bring a growth in resident travel, visitor numbers and in GRDP, are limited by the comparable savings which will be made in travelling from Lochmaddy in North Uist to Uig in Skye. However the Lochmaddy-Uig route is unlikely to have capacity to meet all the demand and CalMac has already amended its timetable to cope with anticipated demand

The introduction of a Lochboisdale to Mallaig route would therefore deliver significant increased demand and economic benefit over and above direct RET benefit.

The existing pier provision would struggle to withstand the usage requirements of RET and a Lochboisdale-Mallaig service and the impact on the community of Lochboisdale will not be acceptable in the long-term.. Only by removing the limiting factor of the draft restriction and space would a significant enhancement of facilities, and efficiency savings for the CMAL fleet be achieved.

FISHING

Landings by Scottish based vessels

The value of shellfish landings increased by 13 per cent in real terms to £163 million and the volume also increased by 13 per cent to 67,000 tonnes.

High value shellfish landings formed 18 per cent of the total by weight but 42 per cent by value, making shellfish the most valuable sector to the Scottish fleet. Employment in the catching sector within Scotland is highly concentrated into a few areas. The two travel to work areas (TTWAs) that contain the largest Scottish fishing ports of Fraserburgh and Peterhead between them account for 22 per cent of employment in the catching sector in Scotland.

Other TTWAs with more than 500 catchers, or 6 per cent of the Scottish total, are Shetland, the Western Isles and Banff. At the other extreme, several coastal TTWAs (Dunfermline, Kirkcaldy, Dundee, Inverness, Lochgilphead, Dunoon & Rothesay, Greenock, Stranraer, Newton Stewart, and Dumfries) have fewer than 50 fishermen.

The general picture is for catching employment to be concentrated in north-east Scotland between Aberdeen and Forres (38 per cent of the catchers), the islands of Shetland, Orkney and the Western Isles (22 per cent), the mainland and Argyll islands part of the HIE area (21 per cent) and, to a lesser extent, in south-east Scotland from Fife to the Berwickshire coast (6 per cent).

The volume of catch landings in the Western Isles in 2007 was 4,200 tonnes, with a value of £11,716,000. This is principally shellfish. The region has 509 employed in fishing, 343 regular full time employed. (Scottish Fisheries Statistics 2007)

The existing facilities at Lochboisdale fishing harbour are in a tidal bay with limited space and a small slip way. Many boats anchor off shore and there is only a small area where fishermen can store creels and ropes, with no secure storage area. Fishing boats need to use the ferry pier at low tides and are frequently required to move when the ferry comes into port to make room.

There are currently around 40 boats which operate using Lochboisdale. This represents a value of approximately £2 million pounds per annum. The value of catch which could be landed in Lochboisdale, but is currently not due to a poor provision of facilities is significant.

2006 Landings by species into South Uist and Eriskay by vessels which are known to land in Lochboisdale.

Species	Weight (kg)	Value (£)
Crabs - Brown (Edible)	58,979	67,044
Crabs - Green	292	155
Crabs - Velvet (Swim)	2,714	5,362
Crawfish	42	1,018
Lobsters	5,157	51,711
Nephrops	26,698	186,880

Provisional landings by all vessels in South Uist and Eriskay:

Landing	Species	Weight (kg)	Value (£)
South Uist & Eriskay (Loch Carnan, Lochboisdale, Ludag, Acarsaid)	Crabs - Brown (Edible)	267	311,939
	Crabs - Velvet (Swim)	75	142,926
	Lobsters	47	484,104
	Nephrops (Norway Lobster)	122	792,899
	Demersal species	6	7,967
	Other Shellfish	5	41,006
	Scallops	7	11,440
South Uist & Eriskay Total		530	1,792,281

The main development opportunities for Lochboisdale to maximise the potential economic and social benefit from a facility would be:

- Creation of a non tidal deeper water harbour with more space and custom made facilities.
- Storage tanks for cost effective bulk buy fuel
- Storage and processing units for stockpiling live shellfish for lucrative peak-season markets
- Razor fish processing and canning factory
- Facilities to take boats out of the water for repair and maintenance at the fisherman's convenience.

Needs Assessment

After consultation with the Western Isles Fisheries Association and individual fishermen, who currently fish from Lochboisdale, the following needs and development potential were highlighted.

Harbour services

- Non tidal deep water harbour is vital for 24 hour access to harbour facilities.
- Fuel storage facilities for supply to commercial and non commercial boats, which should result in reduced costs and easier access for fuel for commercial and leisure vessels.
- Hauling out and positioning cradle, along with undercover maintenance facility, for quick and convenient maintenance and repair. Currently boats need to be craned by a contract operator which is inconvenient and in-efficient.

Storage facilities

- Individual small units for storage of live lobster giving increased profitability by storing lobsters and prawns for peak markets such as the highest priced Christmas period. This represents an opportunity for a 50% mark up in price received. Currently there is only one on island facility for storage, based in Grimsay North Uist, which is running at full capacity.
- Affordable units or storage facilities could be used for business development and business test-trading. For example, if all the by catch of squat lobsters in the Southern Isles were gathered and stored in one place there could be available quantity to go to market.

Processing

- A processing facility would offer significant added value opportunities. At present the prawns etc are packed in portable tanks and a Spanish lorry transports them to Spain, via Lochmaddy.
- Shell fish processing facilities would increase profitability by adding value to a Scottish Island quality product, enabling fisherman to open up new markets for their value added product, while developing existing supply chain relationships by meeting existing customers developing needs.
- There are no fishing business units available in the Southern Isles, resulting in fishermen having to sell their catch on straight away, or use portable tanks which are not efficient and are easily damaged.

Bait

- Currently no central storage facility for bait is available and this would provide an additional opportunity for a local business to supply local bait. Presently, local fisherman use baited static gear for crab etc., with bait bought in from the mainland. Cost of transportation is 20% of actual cost.
- The provision of increased on-shore facilities would enable the fishing boats to develop new products and reach a wider market, including servicing the local market which is not done at present.

Infrastructure

The Lochboisdale to Daliburgh road has been highlighted as a particularly bad piece of road for visitors to the island to be faced with as they come off the ferry, especially at night. A welcoming port of entry with a well sign posted and two lane, well marked out road, would safely transport visitors throughout the island significantly improve first impressions of South Uist.

Local fishermen saw a need to help and encourage young people into the fishing industry and are keen to institute training opportunities where possible.

Development of an appropriate fishing harbour would increase the number of boats operating from Lochboisdale and enable these boats to increase their profitability and raise the GDP of the local economy.

Fish catches relating to Lochboisdale currently account for around £2 million pounds per annum, with room for expansion in existing and new markets, including razor fish and bait catches, as well as processing.

TOURISM

Tourism in the Western Isles

The tourism sector in the Outer Hebrides is of significant importance to the local economy, contributing around 15.6% to the Gross Regional Domestic Product (GRDP) of the Outer Hebrides.

Tourism accounts for 9% of all jobs in the Western Isles (on a par with the industry in Scotland as a whole) and many self-employed posts. Tourism accounts for 8% of jobs in South Uist.

The tourism sector generally is characterised by high levels of part-time and female employment. These proportions are higher than the Scottish average in the Outer Hebrides – 65% of direct tourism jobs are part-time (cf 53% in Scotland), and 65% of the posts are held by women (cf 57% in Scotland). 54% of jobs are in the accommodation sector.

The largest single provider in the area, Lochboisdale Hotel is a key business within South Uist. The hotel was re-opened in 2005, following a two year period of closure. At peak season the hotel supports the full time employment of the family that own and run it. It also employs 12 full-time and 15 part-time people in peak season and 5 full-time and 4 part-time in off peak season. The hotel is in a prime location to cater for yachting customers' needs, and currently provides basic services to visiting yachtsmen.

Accommodation capacity in South Uist has increased steadily from 165 rooms available in 2003 to 182 rooms available in 2007. There is a rise in self-catering accommodation and local service-providing businesses throughout South Uist are staying open longer to extend the season and provide facilities for visitors, such as Kildonan museum Cafe. (*Outer Hebrides Tourism Update 2007*)

Visiting yachts are an important source of visitor expenditure to the Outer Hebrides. The number of yacht visitors is assumed to have risen in line with the general growth in visitor numbers to the Outer Hebrides (a rise of 8.9% between 2002 and 2006). Yacht visitors were last surveyed in detail in 1999.

Average expenditure by yacht visitors is assumed to have risen in line with the general rise in visitor expenditure over the same period (a rise of 19.8% between 2002 and 2006). Average spend is £34.30 per visitor per day (Macpherson update)

The UK Leisure Industry

UK Marinas

The UK coastal marina sector, in terms of operating costs alone, has a turnover of £113 million, directly employs 1,700 people, with an added value of £69 million. In addition, the associated marine and hospitality activities of marina operators are estimated to support a further 600 local jobs and £6.5 million of value added. (*British Marine Federation – Executive Summary – Economic Benefits of Coastal Marinas UK and Channel Islands*).

On-site tenant businesses generate the most significant impact, providing marine related or non marine related services (e.g. pubs and restaurants) to marina berth-holders and visitors.

The overall economic impact of coastal marinas in the UK and Channel Islands is estimated to be as high as £700 million in direct value, with a total contribution of £2.2b within the UK tourism market.

Employment:

The marine leisure industry supports around 30,000 jobs in 5,000 businesses UK wide. Each job in the core coastal marina sector supports a further 12 jobs in the local economy, through tenant businesses, suppliers and as a result of visitor and employee expenditures in the wider economy.

Marinas have the potential to play a significant role in the wider economy, facilitating regeneration and impacting upon residential and commercial property values. Rob Stevens, Chief Executive of the British Marine Federation said, ‘Marinas in the UK provide a focus for boating activity and a safe environment from which to plan adventures afloat with friends or family, explore our coastline or take part in the excitement of racing. They offer a huge variety of facilities and many sites are important centres of employment, with some playing a key role in regeneration and being visitor attractions in their own right’.

There are currently only six moorings located in Lochboisdale for visiting boats, with 700 moorings located on the West Coast mainland of Scotland. In 2005, 248 boats visited Stornoway Inner harbour, 147 of these from the UK. As with many tourism related developments, complimentary provision and cluster effects improve the overall number of visitors to an area. Yachts are more likely to visit the Western Isles if they have two or more stopping points within the Western isles, to extend their stay.

There are 2,190 boat nights available within Lochboisdale currently, with crewing numbers averaging at 2.3. Average daily spend per visitor is £34.85. Therefore existing economic impact of moorings in Lochboisdale could be £175,540 per annum.

There is significant room for expansion in the rate of return to the local economy of South Uist by increasing the provision of services and marketing the enhanced facilities to meet untapped demand within the UK sector.

Provision of 20 berths would represent a direct economic impact of £760,670 to the local economy, with an indirect expenditure resulting in £258,630 within the local economy.

Provision of 20 berths would provide equivalent to 16 FTE jobs in the local economy.

UK Expansion

Scotland is often described by professional sailors as one of the top six sailing destinations in the world. The combination of 'open sea' conditions linked to the large number of islands, bays and anchorages, gives sailors the opportunity to test their abilities in varied conditions with the option to seek shelter at any time.

Scottish visitor sailing in the main will be driven by:

- Sailing destination credentials;
- Interesting coastlines, dramatic scenery;
- Good wind possibilities and favourable tidal conditions;
- Possibility for shelter, safe anchorage / harbour;
- Good access to shore;
- Shore-based facilities: shops, restaurants, bars, toilets, showers, laundry, visitor attractions and heritage sites;
- Number of points of entry.

Discussions with local marina operators within the Clyde basin have identified anecdotal evidence to support the demand for increased provision of facilities on the Western seaboard. Additionally, direct requests to Stòras Uibhist regarding future provision of berths and services have been received over the past year.

Provision of West coast facilities, which enable all levels of sailor to make a trip to the West coast will provide a valuable addition to the marina sector within Scotland. Improved facilities at Lochboisdale will also deliver additionality to mainland providers through increased numbers overall.

This increased business has and will be absorbed efficiently as new pontoon facilities increase throughout Scotland. Many boats based in the Clyde and the West Highlands tend to graduate their experiences annually by sailing further west to the Hebrides and north to the Orkney and Shetland Islands as their crews seek new challenges and different itineraries. This growing trend is likely to test the present availability of pontoon berths in many parts of Scotland. Any

displacement through movement of boats seems to be eliminated by continuous demand for more pontoon berths in every location.

The industry is facing a number of key challenges. One of the most important to address is the constraint on provision of marinas and moorings, with evidence that this is constraining growth in the domestic market for leisure boats and related services. This in turn will limit growth in related tourism, reduce demand for new boats (annual domestic sales of some £200 million), and demand for marinas and moorings, charter companies, inland hire business and sea schools, which together employ 6,000 people and account for an estimated £180 million of value added to the economy. Hence, constraints on supply have important knock-on consequences both for manufacturing and the wider economy.

Caithness and Sutherland Enterprise commissioned a Harbour Facilities development study for the North of Scotland in October 2006. This report identified the need to develop facilities throughout Scotland, to enhance Scotland's reputation, and increase demand within the sector.

North West Coast

The extremities of destination sailing in North West Scotland are at present Skye and the Southern Western Isles. The facilities in the far North are for transit purposes only, i.e. yachts sailing between Orkney, Cape Wrath, Stornoway and the Western Isles and Skye. A small resident facility would help to create destination credentials and become the catalyst to boosting demand.

Cruise liners:

Scotland is a popular cruise destination and its ports feature highly in British Isles cruises and on the North Sea Circuit. Geography plays a part in this as the ports are well spaced and give a good cruising distance. Equally most ports provide access to the splendours of the Scottish countryside and to the traditional Scottish Heritage product. In general terms there is reason to be optimistic that Scotland will continue to flourish as a cruise destination. There is however a range of changing trends that will impact the industry and for which there is a need to prepare.

The UK is the leading source of cruise tourism market after North America. The growth of Port of Call cruise tourism in British Isles ports has been substantial and the competition to win this business is hard fought. Within the UK Port of Call market Scottish ports have a high profile and form a key element of the British Isles experience – indeed, without the Scottish product there is little to attract ships away from the south of England and Ireland. Port of Call business to UK ports has grown significantly and although it dropped by 1% in 2005 it is forecast to grow by 22 % in 2006 as new ships include the UK in their itineraries.

Scotland's specialist cruise market, based around the Western Isles must not be neglected. The Hebrides product is featured in the '100 Best Cruise Vacations in the World' and the market for niche visits is growing. Core markets include wildlife and heritage with golf operators providing additional related products.

Scotland has a strong performance in the premium end of a highly segmented industry and this can be further built on.

Lochboisdale is ideally situated to take advantage of these trends, and provide Scotland with an additional premier cruise port, building on close links to Ireland, The Old Tom Morris Askernish golf course and the Hebridean wildlife.

Looking to the Future - There is good potential for Scotland to grow its cruise tourism in line with or above the overall growth pattern in Europe. Scotland has a wide range of attractive ports, an often charismatic product and a geography that is ideally suited to a range of cruise tourism segments. As competition within the UK increases – notably on the Irish Sea – with ports such as Liverpool and Barrow receiving major investment in infrastructure and marketing, there is a need for Scotland to ensure that its presentation, marketing and visitor facilities are of a standard that will be ‘fit for purpose’.

A priority for action must be to achieve growth and sustain current markets through the provision of appropriate facilities for the major cruise lines – those that are driving growth in the industry – in the main cruise ports of Scotland, thereby ensuring that ‘all facets of the diamond are sparkling’. This means ensuring that provision for large cruise ships meets modern day expectations and provides an excellent shop window for Scotland at all leading ports – the big five in particular.

Scottish Cruise Tourism Study October 2006

TTC International and Roger Tym & Partners

Conclusion

There is significant scope for expansion in development across a Scotland wide level, enhancing Scotland’s reputation, market share and growing the levels of leisure sailing. In particular building on the capacity of the Oban area marinas, and providing excursion options out towards the Hebrides and beyond by the creation of a safe haven port, which has the facilities and services demanded by today’s consumers. The UK market is becoming congested and people are looking for amore “wild” landscapes to explore.

Visitors do not currently make best use of Lochboisdale and the Hebrides, due to a lack of moorings, pontoons and services, including shore side access. If The Western Isles as a whole is to reach the markets of leisure sailors, it must look to become a destination area, which will only be achieved with significantly enhanced services.

Visitors seek and require sailing destination credentials, interesting coastlines, dramatic scenery, good wind possibilities and favourable tidal conditions, all of which Lochboisdale naturally has in abundance. But this must be backed up by shelter, safe anchorage / harbour, good access to shore, shore-based facilities: shops, restaurants, bars, toilets, showers, laundry – visitor attraction heritage, points of entry escape points / good communication networking links.

The primary benefit to the economy comes through the provision of services to the visiting yachts, with 12 indirect jobs supported to each direct job in the marinas sector.

Waterfront developments are recognised as having extensive regeneration impacts within an area, as the waterfront provides a focus for the economic and social development.

Provision of 20 berths would generate direct expenditure of £760,670 within the local economy of South Uist.

There is significant scope for development in the cruise liner market and Lochboisdale is ideally placed to target lucrative specialist markets.

PONTOON PROVISION

Pontoons provide a proven stable berthing structure for visiting boats with a lifespan of between ten to fifteen years. They will work well in the context of the Western Isles, as they provide a robust structure, suitable for all types of craft, but are easily installed at relatively low cost.

Lochboisdale is ideally situated for vessels visiting from Oban and Mallaig, where leisure boats congregate, and are looking for day-sails to the Western Isles. At present, limited services are provided on shore and limited transport links around the islands are offered. However, shore access and shore facilities, as well as draught at berth are currently a severe inconvenience to visiting sailors.

The basic requirement for leisure craft is a sheltered area with safe anchorage and protection from wave action. Water depth should ideally be at chart datum (from lowest tide level) no greater than 5 to 8 metres, with enough draught a low water to prevent bottoming. Adequate space for turning must be provided, which may require a turning arc of 80m diameter.

The Arch Henderson report into potential pontoon facilities highlights the fundamental infrastructure issues with the existing facilities at Lochboisdale harbour, notably space, tidal patterns, shore-side access and draft restrictions.

“the existing CnES harbour is used almost exclusively by fishing boats though there is no doubt that pontoons in a suitable position would almost certainly attract pleasure craft as this is a popular anchorage.” The CnES harbour is limited in size and often requires boats to move to allow others to access. Due to the tidal location, it would be difficult to have leisure craft pontoons in the area of the existing pier.

The report confirms that there are serious restrictions, *“while the bay beside the hotel may be an option within the existing Cal Mac/ fisheries pier lay-out the shore side access is a problem and therefore has been discounted.”*

The only credible solution requires movement of the Cal Mac pier and construction of a wave screen with significant cost and benefit implications.”

The report considers pontoon provision in isolation and therefore makes limited suggestions for location. The study did not consider holistic developments which would make further use of land available, and consider wider cost benefit analysis of a larger scale development. The provision of pontoons alone does not justify this expenditure, however a wider development which capitalises additional land , makes it viable to invest in locating pontoons at the mouth of the Loch.

**Pontoon facilities at Miavaig, stockinish Lochboisdale and Acarsaid
Interim report 2000 Arch Henderson**

DEMOGRAPHICS

Population

The most recent mid-year population estimates (2006) for the Western Isles (also known as the Outer Hebrides), gives a population of 26,350. The population for South Uist and Eriskay is 1,951.

The decline in population over the last ten years (between 1996 and 2006) in the Western Isles was the highest of any Local Authority in Scotland at -7.9%. In South Uist and Eriskay the population decline has been -14%.

Demographically, the population of the Western Isles is declining and ageing. The 'average age' in the islands was estimated to be 41 years for males (Scottish average 38 yrs) and 44 years for females (Scottish average 41 yrs) in June 2006.

The greatest decline by age group has occurred in the 15-29 year category (from representing 17% of the population in 1995 to 14% in 2006). Young people often leave to finish their education to HND or degree level, or to find work. They make a new life for themselves off-island and their skills are lost to the community. Some return for the quality of life they remember but frequently the lack of work and services are key reasons for people not returning.

The Lochboisdale regeneration project aspires to reverse this trend by creating permanent jobs over a wide range of skill levels, expanding business opportunities and developing recreational facilities to enhance quality of life.

The greatest increase by age group has occurred in the 45-64 categories (from representing 24% of the population in 1995 to 28% in 2006). This is exacerbated by inward migration profile of couples and individuals who are retired and of non-child bearing age.

This has serious implications for the provision of public sector services and resources, including schools, social service provision, healthcare and also the quality of life for the islands as a whole.

Population projections

Using the 2006 population estimate (26,350) as a base and taking into account key assumptions (mortality, fertility and migration); the total population of the Western Isles is projected to fall to 24,892 by 2031. This is a projected decline of 5.5% or 1,458 people between 2006 and 2031. The equivalent figure for Scotland over the same time period is a decline of 5%.

This in itself is not a critical concern, however the underlying figures of age related migration are. Between 2006 and 2031, the Western Isles is projected to see a large decline in the key age groups of 0-15 years (-25%) and those of working age, 16-64 yrs (-11%). By this date, 33% of the population is expected to be 65 years and over.

The Western Isles is projected to see a large percentage decline in annual births between 2006 and 2031 at -38%. Births are set to fall from 250 in 2006/07 to 154 in 2030/31. In Scotland the percentage decline in annual births is 11%.

GDP

The most current estimate of Gross Domestic Product (GDP) specific to the Western Isles is that produced in the 2003 Regional Accounts. This study estimated GRDP per head of population to be 66% of the UK average. The 2003 Regional Accounts further estimates that the overall Western Isles economy has experienced 2.5% growth in real terms since the 1997 study, a rate significantly lower than that experienced in the UK economy as a whole.

A 'Wealth of the Nation 2003 Report' reports the Western Isles average household income at £23,400 for 2003. This represents a 5% increase from 2001, however, the Western Isles is ranked 3rd equal lowest out of 121 UK Postcode Areas, only Dumfries and Truro are lower.

Labour Market

In 2006, 58.6 % of the population of the Western Isles were of working age (males aged 16-64 and females aged 16 - 59). This is a lower than average rate compared to key comparable areas (60.8% for Highland, 60.1 % for Orkney and 61.2% for Shetland) and is due to the islands skewed demographic structure; which has a high percentage of its population in 'older' age groups and a lower percentage in 'younger' ones.

The demographics are skewed due to young people leaving to expand their horizons and to further their education. Once lives are established on the mainland and new social structures formed with lifestyle expectations and reliance on services and facilities it can be hard to return to the islands.

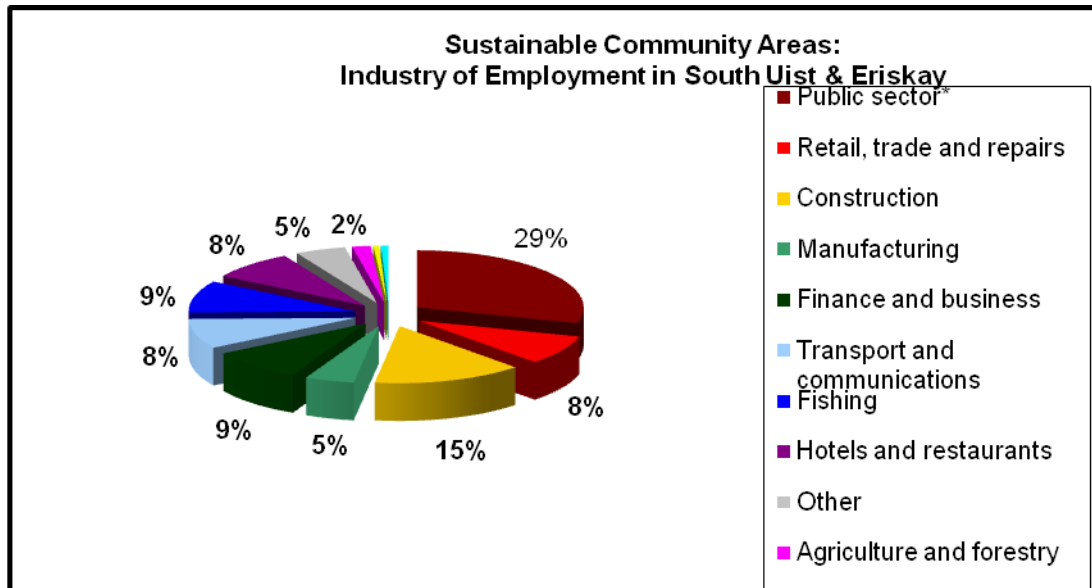
Addressing these issues to attract young people with vital skills back into the local jobs market by providing sustainable work and lifestyle opportunities is necessary to regenerating the local economy.

The activity of the public sector is significant to the Western Isles economy. Based on the 2003 Regional Accounts, 30% of total employment is in the public sector (admin; defence; education; health; or social work) The preserved permanency of these jobs give families stability and confidence in their future in the islands. The exception to this rule is QinetiQ the private sector defence establishment which accounts for approximately 10% of the workforce in South Uist and Eriskay. Speculation about downsizing this facility has been ongoing for some time, leading to insecurity in the local labour market. If downsizing does occur there will be an even greater need for the creation of new jobs to retain skilled, high earning, workers on-island.

In the Western Isles, primary sectors are also more important in terms of employment, as shown in the table below.

9% of the South Uist and Eriskay population is employed in the fishing industry. This is well above the national rate of 2% which is to be expected as South Uist and Eriskay are traditional active fishing communities. People have a strong bond with the sea with skills and knowledge passed down through the generations. Through innovation, utilising opportunities and sustainable harvesting agreements the fishing industry has continuing importance as an income generator for the local economy.

Western Isles households derived a higher proportion of their total income from self employment (8%) than in Scotland as a whole (5%) in 2003; however analysis suggests that the dependence on self employment income has declined since 1997.



Implications

All the employment sectors in South Uist and Eriskay could be affected by the pending recession and rising fuel prices, including the public sector.

Lack of consumer confidence in the financial services market may affect the number of new house builds being commissioned. The fishing industry is frequently a family run established businesses which are unlikely to lay off workers, but profitability and spending power will be reduced if there is a slowdown in sales of quality luxury items, such as hand dived scallops and lobsters.

Regeneration of Lochboisdale will impact on all key sectors of employment in South Uist and Eriskay.

The construction phase will generate significant employment opportunities at a time of recession in the building sector.

Increased tourism numbers once the development is complete will benefit the tourism sector and the retail sector. Leisure boating facilities and services will also generate non-seasonal employment opportunities.

This rise in employment and tourism will increase GDP in the area and stimulate private house building and local retail spend.

Improved fishery services will improve efficiency and profitability of the sector, resulting in greater spend in the local economy.

Improved job prospects will also help address the skewed demographics and help restore the age profile of the local population placing a lower burden on social provision costs.

All figures found in <http://www.cne-siar.gov.uk/factfile/socioeconomicoverview.htm> WESTERN ISLES SOCIO-ECONOMIC OVERVIEW June 2008, Department for Sustainable Communities and South Uist fact file.

HOUSING

The Western Isles has a distinctive tenure profile. Within South Uist and Eriskay, there are 789 households housing 1,951 people. There is not a good mix of properties available on the Islands, and a considerable shortage of first homes. The property breaks down into 754 houses (96%) and only 28 flats. (3.5%) 7 households are caravans/ chalets (0.5%) (Western Isles Socio-economic overview)

The high level of private housing reflects the fact that there are around 6,000 crofts in the Western Isles and that some 77% of the land area is held in crofting tenure. Crofting has been of critical importance in helping retain rural populations in many of the 280 townships scattered throughout the Western Isles. (HHP Business plan)

The 2007 estimate for the number of 'households' in the Western Isles was 11,706; an increase of 109 (0.9%) since 2006. Using the 2006 based household projections we can see that there is estimated to be a 14% increase in the number of households in the Western Isles from 11,600 in 2006 to 13,230 in 2031.

The projected increase can largely be attributed to more people living alone or in smaller households; the average household size in the Western Isles is projected to decrease from 2.25 in 2006 to 1.85 in 2031; sixth lowest out of Scotland's 32 local authorities.

Changes in household type between 2006 and 2031 are projected to include a 43% increase in 'one adult' households and a 20% increase in 'two or more adult' households.

The existing social rental market is dominated by the Hebridean Housing Partnership (Housing Association) following a stock transfer from Comhairle nan Eilean Siar in 2006, with the remainder primarily supplied by the private sector. In Lochboisdale, HHP lease 28 flats from a local building contractor.

There is a proportionally high number of detached properties within the Western Isles, which is a reflection of land availability and not a reflection of affluence as with other areas. House building tends to be completed on an individual basis, rather than speculative developments resulting in limited availability of rented housing and first homes.

House Prices

House buying patterns in the Western Isles has variations on the patterns of Scotland as a whole. House prices, whilst lower than in some areas, have risen sharply in recent years, at a pace that is rapidly exceeding affordability levels for those living and working on the islands. This is a trend which has occurred in other remote rural areas across Scotland, causing significant issues in local access to property and is a key driver of outward migration.

Since 2001 house prices at the lower end of the market have increased at a rate much greater than the rate of growth in earnings. Thus a growing proportion of aspiring new owners are being

priced out of the housing market. Inability to purchase housing is a particular issue for single people and other single earner households.

The population statistics show that there will be a significant rise in the number of single households within South Uist in the next 20 years and private housing will require to be developed to account for this.

COMMUNITY CONSULTATION

The local community of Lochboisdale and South Uist have been closely involved and consulted on the proposal for a Lochboisdale regeneration plan. The two major pieces of consultation in the last 10 years clearly identified community support for the Lochboisdale regeneration project:

Initiative at the Edge and Lochboisdale

Iomairt aig an Oir was established in 1998, in recognition that pockets of the Highlands and Islands suffered from serious economic and social fragility. The project sought to bring forward a new way of tackling the issues of serious deprivation, through joint working and facilitation to deliver significant change.

“It empowers communities in some of Scotland’s most remote and fragile areas to identify their needs for area regeneration, consider what actions might be appropriate and develop relevant projects in partnership. One of the key features is that there is no source of central funding and its success depends overwhelmingly on the refocusing of the support given by public sector agencies working in partnership with communities.”

The IaaO process intrinsically recognised that significant change would only come through a joint focus on specific community aspirations rather than piecemeal development.

Formal evaluation of the report recognised that the principle of a community led partnership approach lead to significant developments, the time taken for this type of approach to permeate was vastly underestimated. It identified a range of factors that had to be in place for this approach to be successful. The major factors involved included, strong community leadership, acceptance of the long term nature of this type of approach, stability and continuity of delivery arrangements.

The community buy-out process and community company ownership of South Uist Estates Ltd. provides the necessary enablers for the community to take the lead in a strategic development project for Lochboisdale.

Initially taken forward by the community of the Southend of South Uist, then Stòras Uibhsit, the project has developed fundamentally from within the community and resulted in an accepted Lochboisdale regeneration vision. This integrated approach from within the community has highlighted the need to address a Lochbosidale Regeneration project holistically to deliver the aspirations of the greater local community, rather than an individual user group.

Community survey 2007.

In 2007 the community planning partnership undertook a survey of Western Isles residents, by community planning partnership area. This survey was conducted by Ipsos MORI Scotland on behalf of the Outer Hebrides Community Planning Partnership.

The survey was the first island-wide survey designed to gather information from all residents to inform the future development of the islands and local communities. It represented the key consultation device for the Partnership in their commitment to actively engage with local residents towards improving community vitality throughout the Western Isles.

As part of this, the South Uist and Eriskay sustainable community area included a number of questions that were asked only of South Uist and Eriskay residents. These include: perceptions of a number of suggested developments in South Uist and Eriskay; support for the provision of housing on common grazing land in the area; prospective household use of facilities at the new pool complex in South Uist; perceptions of the role of the church in the local community; and levels of support or opposition for the construction of a fixed link between Harris and North Uist.

Most residents (90%) living in South Uist and Eriskay are satisfied with the islands as a place to live. The overall satisfaction level across the Outer Hebrides was 94%. This difference is not statistically significant. Around half (48%) say they are very satisfied, while 43% say they are fairly satisfied with the islands as a place to live. Only 4% of residents who returned a questionnaire say that they are dissatisfied.

Residents were asked how much of a priority should be given to seven suggested developments in the South Uist and Eriskay area. A majority of residents said that a high priority should be given to the following proposals: developing the Askernish Golf Course (53%); regenerating Lochboisdale (53%); and developing public walkways (50%). (See figure 2).

Residents were less likely to say that high priority should be given to the following proposals: developing archaeological and heritage sites (33%); providing local history activities and information (32%); providing community Christmas decorations and activities (26%); and upgrading the football pitch at Eochdar (23%).

Around 6 in 10 (60%) residents support proposals to build new affordable housing on common grazing land. Around 1 in 5 (21%) residents oppose this proposal (see Figure 3). The majority of residents (54%) also support the provision of new social rented housing on common grazing land. Again, around 1 in 5 (21%) residents oppose this proposal.

POLICY CONTEXT

The Scottish Governments Economic Strategy identified key aims for the Scottish Economy:

Economic Growth (GDP)

To raise the GDP growth rate to the UK level by 2011

To match the GDP growth rate of the small independent EU countries by 2017

Productivity

To rank in the top quartile for productivity against our key trading partners in the OECD by 2017

Participation

To maintain our position on labour market participation as the top performing country in the UK

To close the gap with the top five OECD economies by 2017

Population

To match average European (EU15) population growth over the period from 2007 to 2017

(Supported by increased healthy life expectancy in Scotland over the period from 2007 to 2017)

Solidarity

To increase overall income and the proportion of income earned by the three lowest income deciles as a group by 2017

Cohesion

To narrow the gap in participation between Scotland's best and worst performing regions by 2017

Sustainability

To reduce emissions over the period to 2011

To reduce emissions by 80 percent by 2050

Highlands and Islands Enterprise Operating Plan

HIE's operating plan 2008-2011 identifies the key drivers of regional competitiveness over the coming years as:

- **Population:** to achieve a growing population in every part of the area will require active promotion, combined with creation of the conditions which will allow population to grow. These include availability of employment, housing, schools, healthcare and the many other factors which convey quality of life to those thinking of staying or locating in the area.

- **Economy:** to widen the employment base, with higher economic activity rates and rising income levels, we require the propulsive businesses of the area to grow significantly over time through sustained increase in turnover, productivity and profitability. Equally, new business creation and inward investment will have a major part to play in bringing new economic activity.

Linkages: to improve physical connectivity will need investment in the major transport projects which will bring step-changes in access. Electronic communications are also of huge importance and continuous investment will be required, as technologies are superseded and expectations rise.

Universities: the UHI's potential contribution to the Highlands and Islands is massive, but we require to press on beyond the acquisition of university title to build a high-quality institution, distinctive in its form but capable of transforming the economic, academic and demographic profile of communities.

Services: to sustain good quality services throughout the region, adapted to Highlands and Islands conditions, we need to seek equivalence with the level and standard of services delivered elsewhere. Increasingly, this will offer opportunity for innovation and flexibility so that the design and delivery of services is developed to match the needs of rural communities.

Communities: to give local communities greater involvement in the shaping of their own futures will build on the impetus given by community land and energy developments. The ability of communities to become involved in revenue-generating projects is becoming an important driver, allowing wider community benefits to be realized from the income stream.

Prospects: one of the most notable trends of the last generation has been the growth in confidence across large parts of the area. Building on that momentum will further benefit the region, but efforts will need to continue in those fragile areas where confidence is at lower levels.

HIE's contribution to the Government Economic Strategy targets

A key part of HIE's work lies in the *transformational projects* which it undertakes. These have been selected on the basis of their importance to the economy and the level of resource that HIE has committed to them. The following table brings them together and indicates which of the Government Economic Strategy challenges they principally address:

South Uist

- Main Government Economic Strategy contributions – **economic growth, population, solidarity, cohesion.**
- Target – work with the community owners and partners to ensure flow of benefits to the local community through new economic activity, service provision and housing development.

The Western Isles Local Plan

The CnES finalised local plan identifies Lochboisdale harbour regeneration project as a target for the 2007-2013 time period.

Prop LP/ED 11 Piers and Harbours

It is proposed to develop the following:

- a) Lochmaddy Pier – development to extend berthing and fishing facilities subject to the outcome of technical investigations and subject to any necessary appropriate assessment of proposals which may have a significant effect on the Loch nam Madadh Marine SAC.
- b) Leverburgh, Harris – construction of breakwater and provision of pontoons and on shore parking.
- c) Kallin, Grimsay - construction of breakwater and improved access with provision of new ice plant.
- d) Acarsaid, Eriskay – provision of new pontoons and parking.
- e) Lochboisdale Harbour-improved harbour and fishing facilities together with related development of business, tourism and housing activities.

In order to achieve this aim, CnES allocated Lochboisdale harbour phase 1 development £650,000 in the current capital programme, subject to revision of the budget in relation to schools provision.

There is clear support for the development, which has been backed up by significant informal consultation with residents, fisherman, local businesses and crofting interests.

Outer Hebrides Migration study 2007

Alarmed by the figures in the 2001 census Comhairle nan Eilean Siar, in partnership with Western Isles Enterprise and Communities Scotland, in 2006 commissioned a study to investigate the dynamics of migration and population change as it affects the Outer Hebrides.

The overall aim of the research was to identify the causes, key drivers and socioeconomic impacts of population change and to propose evidenced based solutions for achieving demographic sustainability for the Outer Hebrides.

Following the report, the migration study group produced an action plan which identified the key factors in reversing this decline:

- To achieve a sustainable population this would require policies that focus on: Widening employment opportunities for skilled workers, particularly for women;
- Providing a greater number and range of vocational training opportunities and apprenticeships that will allow more young people to stay in the Outer Hebrides;
- Providing housing options that are desirable, accessible and affordable to people in the early stages of their careers; and
- Ensuring a quality range of social and leisure facilities that are attractive to women and younger children.

The key essentials in terms of policy going forward are: sustainable employment; private sector led economic diversity; housing provision, self determination; and clean energy. Holistic development

OUTER HEBRIDES MIGRATION, STRATEGY GROUP, "Strategic Thinking and Joint Working", Action Plan, 2007 – 2008, June 2007.

The action plan recognizes that it will be difficult to affect real change by addressing any one factor in isolation, and that it is a combination of factors which will influence individual choices. Therefore addressing the choices individuals make will only be achieved through tackling the issues in parallel, and in a holistic fashion.

Outer Hebrides Area tourism Action plan April 2006 – March 2009

The above plan identifies a range of actions the partnership seeks to deliver and facilitate in the period to March 2009. Within this plan, the partnership seek to develop sailing and marine tourism through promotion and development of the products associated within marine tourism industry.

KEY FINDINGS

Baseline

- The community of South Uist suffers from a low GDP and economic fragility.
- The productivity, profitability and economic growth of South Uist are curtailed by the restraints of the existing provision of housing, transport (regional) economic value-added and leisure sailing service provision.
- South Uist is suffering from acute population decline, 14% in the last 10 years. Depopulation at this rate critically undermines the viability of services and communities.
- Quality of life, community, employment and housing are the key drivers in decisions on migration, particularly for returners.
- The Outer Hebrides migration group identified the need for a co-ordinated approach to development to ensure the alarming rate of population decline is reversed.
- Housing requirements will change drastically in the next 20 years with the increase in single occupancy homes. There is currently a fundamental lack of private rental properties within the market in South Uist.

Ferry Traffic

- There is not enough marshalling area for the existing requirements of the current ferry service, causing traffic problems and restricting the use of the adjacent fishing harbour.
- The existing design of the Lochboisdale harbour will not allow for the benefits of the RET pilot to be fully realised, due to constraints in on shore facilities.
- The introduction of a Lochboisdale Mallaig ferry on the route will cause extensive pressure on the existing infrastructure within the area. In particular the lack of long stay parking and ferry loading bays.
- Single berth pier capacity is a major issue in relation to ferry service delivery.
- Introduction of RET and the Lochboisdale Mallaig route will cause a critical need for development.
- There is no scope for provision of additional parking, traffic lanes, visitor accommodation, and visitor services within the constraints of the current pier area or the surrounding area.

Fishing

- The fisheries pier is totally inadequate to meet the demand of the existing users, due to its, size and tidal nature, and lack of services. This restricts the usage in relation to current demand.
- The current provision of fishing shore facilities is restricting the economic potential of the industry within South Uist, and prevents fishermen from maximising the benefit of existing catches, or taking on new markets.
- Significant economic losses are made in the islands through the lack of value added within the fishing sector. Provision of these facilities would increase the areas productivity and profitability.
- There is no scope for development of the fisheries harbour within the existing pier constraints.

Leisure Sailing

- Lochboisdale is currently not meeting its potential as a destination, through lack of basic service provision and shore side access for visiting boats.
- The Western Isles is losing opportunity in the leisure sailing industry through a lack of destination ports of call for yachts, sailing boats and cruise liners. Scotland's industry would benefit from enhanced facilities in Lochboisdale.
- Provision of 20 berths would represent a direct economic impact of £760,670 to the local economy. Indirect expenditure would be £258,630. Provision of 20 berths would provide equivalent to 16 FTE jobs in the local economy.
- There is no scope for development of pontoons or a marina within the existing set-up of Lochboisdale pier. This represents a loss to the local, regional and national economy and potential to grow tourism and reach national targets for growth.
- The regeneration of the whole island would be supported by the development of a unique destination port within the Southern Isles to compliment Stornoway and Oban.

Social impacts

- The key essentials in terms of policy going forward to retain population levels, and critically numbers of women and children, are: sustainable employment; private sector led economic diversity; housing provision, self determination; and clean energy.
- There is a desire within the community to grow local businesses and services in response to the growth in opportunity within a redeveloped harbour area in Lochboisdale.
- Lochboisdale harbour regeneration will facilitate all of these and enhance the quality of life of the inhabitants of South Uist, and will impact on reversing population decline.
- Visit Scotland, the national tourism body for Scotland, recognises investment in good design and public spaces that are a genuine source of civic pride is a sound investment which can help transform the perception and reality of our neighbourhoods, towns and cities.
- Well designed and efficient buildings and public spaces make communities more desirable places to live and work; they help retain and attract services, investment and job opportunities; and they can bring prestige to an area and raise its commercial and public profile.
- Delivery of an aspirational development will have significant socio-economic benefits over and above the benefit of each constituent part.
- Delivery of the Tom Morris Askernish golf course has shown that there is significant untapped international interest in South Uist and that the community has the skills, resources and capacity to meet this expectation.

The above findings show the current demands and requirements of existing users are not being adequately met within the Lochboisdale pier area, with conflicts over land use, and a make-do approach to usage.

Increased ferry traffic numbers expected as result of RET, in the very near future will amplify the problems of restricted space. The demands of a Lochboisdale Mallaig route would require the critical issue of space to be addressed.

Individually the ferry pier, fishing pier, leisure sailing facilities nor local amenity facilities could be upgraded or enhanced, within the existing confines without significantly causing a detrimental impact to all the other users.

The total value added resulting from addressing all the issues in one transformational waterfront development would have a significant national impact and hold international interest making the regeneration viable through it's impact on local and national GDP.

The Lochboisdale regeneration project would have a significant impact in improving the productivity, profitability and economic growth of the South Uist community, Western Isles region and Scotland as a whole, improving regional competitiveness and reducing the inequality in economic performance faced by the Western Isles.

Previous studies have looked at these users and issues in isolation, and have similarly concluded that little could be done for each user group on an individual basis without the costs heavily outweighing the benefits.

Therefore, the only option that would allow each user group to meet current and future demand is one that addresses all areas together, in a transformational project.

VISION FOR DELIVERY

A key element to the Lochboisdale harbour development is the opportunity to learn from other waterfront developments, and recognise the added value in good, efficient, aesthetically pleasing design over a sizeable area, and the additionality this brings. It provides the opportunity to minimise the negative environmental impacts of a large scale construction requirement.

This ethos of aspiration development, along with the requirement to tackle the constraints, underpins the rationale for a combined, facilitated development for Lochboisdale, rather than a phased process of individual upgrades or projects.

South uist requires a vibrant waterfront which reflects Lochboisdale's continuing importance as the heart of fishing, tourism, family and community all working in harmony with the stunning surroundings in South Uist, and ultimately makes Lochboisdale a destination location for locals, visitors, workers and families, that will raise the economic prosperity of the area.

The local community aspire to a development which will:

- Create a recognised port of entry for South Uist.
- Develop Lochboisdale as a West Coast fishing town
- Create of a marina and facilities for visiting and permanent yachts.
- Provide a gateway for the Outer Hebrides for leisure sailing. Improve provision of facilities for walking, cycle paths and recreation.
- Create a new civic space with local interpretation and focal point for the community.
- Provide a twin berth harbour to support all the requirements of existing and new users, including Cal Mac, commercial cargo, leisure boats and cruise liners.
- Provide attractive sites for a variety of new mixed housing.
- Open up sites for commercial developments.
- Enable local businesses to grow and prosper.

The development concept consists of a series of interlinked projects comprising:

- a marina, with associated new business opportunities
- private aspirational housing
- commercial area

- leisure sailing facilities
- a twin berth harbour
- A fisheries pier and facility

This waterfront development will be delivered with a mix of public, private and third sector involvement, facilitated by third sector lead developer.. The leverage opportunity on initial public sector investment will be substantial.

The range of investments and developments can only be met through the provision of initial infrastructure requirements to enable partners to take forward the related developments on serviced sites. The initial investment is required to provide a road and causeway to Gasay Island, linking it to the main village of Lochboisdale.

The provision of this infrastructure would provide the required space to meet the:

- Existing demands of current users
- Previously unmet demand by current users
- Growth in demand from existing and new users
- Growth in GDP
- Growth in population
- Growth in services and opportunities

The over-arching aim is to create a new focus for Lochboisdale renewing its destination status within the Outer Hebrides, bringing economic regeneration and reversing population decline.

Lochboisdale has great potential to be an attractive location in which people would choose to live, work, visit and spend leisure time. This potential cannot be realised without significant extension to the existing land area used.

At the core of the development concept is partnership development, with Stòras Uibhist taking the lead in bringing all the public, private and agency bodies with an interest in Lochboisdale together, and facilitating the individual projects together to generate the maximum return for the local community, enhance the regional competitiveness of the Western Isles and assist national targets for growth in the economy.

A facilitated development is the most environmentally sustainable way to achieve the economic and social aims of regeneration, whilst minimising the negative environmental impacts of such a large scale development. The facilitated development will enable Stòras Uibhist to maximise the use of sustainable energy and building techniques through economies of scale.

