



## **Response to the Enterprise and Business Committee's Inquiry into the Potential of the Maritime Economy in Wales**

**October 2015**

**Wales Environment Link (WEL)** is a network of environmental and countryside Non-Governmental Organisations in Wales, most of whom have an all-Wales remit. WEL is officially designated the intermediary body between the government and the environmental NGO sector in Wales. Its vision is to increase the effectiveness of the environmental sector in its ability to protect and improve the environment through facilitating and articulating the voice of the sector.

Wales Environment Link values the opportunity to submit information as part of this inquiry.

### **Introduction**

Wales Environment Link (WEL) Marine Working Group (MWG) is submitting this response to the inquiry in the interest of broadening the Committee's perspective; the maritime economy in Wales, and the potential therefore, encompasses a variety of industries not covered by the inquiry in its current form. These industries include, but are not limited to, aquaculture, tourism and recreation.

Due to the known competing demands on the marine environment, the development of the maritime economy must be done using an ecosystems-based approach – looking at the management of the environment as a whole, including the human relationship with the environment, whilst equally balancing the social, economic and environmental issues. This will encourage harmonious working of the historically competing sectors, allowing for the sustainable future of our marine environment in Wales.

Equally by enshrining the principles of Sustainable Development <sup>1</sup> in the development of the maritime economy, industry growth in all sectors can be achieved within environmental limits, securing the future sustainability of the marine environment and economy

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<sup>1</sup> [http://www.sd-commission.org.uk/pages/the\\_principles.html](http://www.sd-commission.org.uk/pages/the_principles.html)

## Example - Marine Tourism in Wales

The Wales Tourism Alliance has reported that £2.7bn (5.8% of Wales' GDP) is directly contributed to the Welsh economy through tourism, this is a higher contribution than any other UK country. By 2020 this is projected to increase to provide a 6.9% contribution to Wales' GDP, supporting 188,000 jobs<sup>2</sup> (13.7% of total employment).

However, according to the Marine Conservation Society Beachwatch Report 2014<sup>3</sup> Wales also leads the UK in terms of marine litter found on beaches. Marine Litter can have a significant impact on the economy, as well as coastal and fishing communities.

Coastal tourism is vulnerable to the negative effects of marine litter and water quality; a report from the University of London shows potential costs of up to £16m per year, discounting larger economic losses that can arise from beach closures and the wider ecosystem services such as the value of wildlife<sup>4</sup>

For Wales, designation of the seven marine SACs already supports an annual recreational value of £68–122 million and generates a one-off non-use value of £66–129 million.

In terms of non-monetary assessment of cultural ecosystem services, results indicate that the most important benefits to divers and anglers of marine sites were engagement and interaction with nature (including feeling connected, getting to know nature, and appreciating its beauty), transformative values (including memorable experiences) and the sites' social bonding value. However, therapeutic, identity and spiritual values of nature were also important at sites across the UK<sup>5</sup>.

Research has also been undertaken into the recreational activity and one case study indicated revenue of £51.4m per annum which equates to £24.5m Gross Value Added<sup>6</sup>. The whole subject area of recreational benefits has been excluded from this inquiry and needs further investigation.

## Marine Consenting Regime

We understand that this inquiry has developed through concerns raised about the impact of the planning/marine consent regime, suggesting that this is causing delays and jeopardising investment/business development in ports.

Marine licensing is a relatively new requirement on the marine industry from the Marine and Coastal Access Act (MCAA); with any new requirements there will be frustrations

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<sup>2</sup> Wales Tourism Alliance (2012). *Wales Tourism Definitive Value Report*.

[http://www.wta.org.uk/creo\\_files/upload/main/wta\\_definitive\\_value\\_report.pdf](http://www.wta.org.uk/creo_files/upload/main/wta_definitive_value_report.pdf)

<sup>3</sup> [http://www.mcsuk.org/downloads/pollution/beachwatch/latest2015/MCS\\_GBBC\\_2014\\_Report.pdf](http://www.mcsuk.org/downloads/pollution/beachwatch/latest2015/MCS_GBBC_2014_Report.pdf)

<sup>4</sup> Lee, J (2014), *Economic valuation of marine litter and microplastic pollution in the marine environment: An initial assessment of the case of the*

*United Kingdom* [www.eftec.co.uk/keynotes/envecon-2015/lee-paper/download](http://www.eftec.co.uk/keynotes/envecon-2015/lee-paper/download)

<sup>5</sup> Kenter, J.O., Bryce, R., Davies, A., Jobstvogt, N., Watson, V., Ranger, S., Solandt, J.L., Duncan, C., Christie, M., Crump, H., Irvine, K.N., Pinard, M., Reed, M.S. (2013). The value of potential marine protected areas in the UK to divers and sea anglers. UNEP-WCMC, Cambridge, UK.

<http://uknea.unep-wcmc.org/LinkClick.aspx?fileticket=Mb8nUAphh%2BY%3D&tabid=82>

<sup>6</sup> Wales Activity Mapping: Economic Evaluation of Wales Marine Recreational Activity

<http://www.walesactivitymapping.org.uk/wp-content/uploads/2013/07/Wales-Activity-Mapping-Economic-Valuation-of-Marine-Recreation-Activity-Non-Tech-Summary-Nov-2013.pdf>

within industry. However Natural Resources Wales (NRW) have developed a robust consenting regime within the requirements of the Act; further to this there is a plethora of ongoing work to streamline this process; this includes amendments to the marine licensing requirements within the proposed Environment (Wales) Bill 2015, and ongoing model and fees reviews through Welsh Government and NRW.

WEL MWG are actively involved in these areas of work and believe that the proposals, along with the ongoing development of Wales' National Marine Plan (WNMP) are focused on taking an ecosystem-based approach, balancing the environmental, social and economic requirements of the Wales marine area, and accounting for all users of the environment. We believe that this is the correct, fair and transparent way to plan for the sustainable and equitable use of a competitive environment, ensuring the future sustainability of our marine environment for generations.

### **Wales Bill**

It is currently understood that a draft Wales Bill will include powers for the Welsh Government to licence for and conserve past the current 12nm limit out to the median line with Ireland<sup>7</sup>. It is currently unclear however, whether there would be any extra resources within Welsh Government and NRW to fulfil these functions, this would be critical in ensuring the additional responsibilities in the offshore area are managed in a sustainable way.

### **Wales National Marine Plan**

As previously mentioned the Welsh Government is currently working on developing a Wales National Marine Plan (WNMP), due to be published 2016. The WNMP is taking an ecosystem-based approach so will allow the strategic importance of all planned activity in the marine environment be realised, assessing the environmental, economic and social impacts and outcomes of any plan or project.

The recently published Wales Marine Evidence Report suggests “that economic growth from taking a planned approach will most likely occur in the ports and shipping, marine renewable energy, tourism and leisure and aquaculture sectors. This does not preclude that other sectors will also experience growth from a planned approach<sup>8</sup>”.

### **Conclusions**

WEL MWG do not believe that the potential of the maritime economy in Wales can be assessed with regards to ports, shipping and energy in isolation. The marine environment is a complex, integrated and competitive environment and needs to be assessed as such. We consider the current remit of this enquiry to be too narrow to get a truly representative and holistic view of a resource that needs to be realised sustainably, now and in the future.

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<sup>7</sup> Powers for a Purpose: Towards a lasting devolution settlement for Wales

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/408587/47683\\_CM9020\\_ENGLISH.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/408587/47683_CM9020_ENGLISH.pdf)

<sup>8</sup> <http://gov.wales/docs/drah/publications/151008-wales-marine-evidence-report-master-october-2015-en.pdf>

**Signed on behalf of WEL Marine Working Group:**

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