



## Aim

The project reviewed the past trends and made projections for the next 6 and 20 years in the north east, north west, south east and south west marine plan areas for each marine sector in the [Marine Policy Statement](#) (MPS). It considers potential key future changes and policy directions of relevance to the sectors, using three scenarios which have been used before in the [Celtic Seas Partnership futures report](#). The report also assesses the confidence underlying the projections for each sector.

## Introduction and methodology

In developing marine plans, the Marine Management Organisation (MMO) must ensure that all sectors are managed fairly and proportionately to enable sustainable development. The north east, north west, south east and south west marine plan areas are busy yet diverse in their activity levels and types, with some levels of activity likely to increase significantly over the next few years. Evidence on the nature and scale of the potential future development of each sector is required to ensure that their needs are fully understood and consideration of potential conflicts and complementarities are incorporated appropriately into marine plans.

The review considered information on historical trends for the last 10 to 20 years, industry projections (where available) and potentially significant future changes such as technological advances, changes in ecosystems and policy directions. Information on the spatial distribution, intensity and economic value of each sector in the north east, north west, south east and south west marine plan areas over the last 10–20 years was summarised. A PESTLE (Political, Economic, Social, Technological, Legal and Environmental) analysis was then undertaken to identify key changes that could affect the sectors in the future.

The information on drivers and trends was used to develop projections of potential future change in the scale and location of each sector in each of the four marine plan regions over the next 6 and 20 years. These projections were constructed under three different scenarios to seek and identify possible alternative outcomes that could occur depending on the importance of particular drivers over time. Building on the work of the [Celtic Seas Partnership Future Trends project](#), the three future scenarios considered were Business As Usual, Nature At Work and Local Stewardship. The projections and scenarios are not intended as predictions of what will happen, rather what might happen under a particular set of assumptions or conditions.

The project also included targeted engagement with marine sector representatives, who provided feedback on proposed projections and interpretation of scenarios for incorporation into the final report. This report will help inform future MMO work during the marine planning process for the north east, north west, south east and south west marine plan areas.

## Results

Levels of current activity and projections for growth vary regionally, reflecting the distribution of the biotic and abiotic resources on which human activities depend. For example, the south west



marine plan areas are important for tourism and recreation, fisheries, telecommunication cables, defence and nuclear power generation, but also contain renewable energy resources and marine aggregates that could be suitable for further exploitation in the future. The south west also has potential for future shellfish aquaculture development. The south west is less important for oil and gas production and has relatively few major ports.

The north west marine plan areas are also important for tourism and recreation and for fisheries. They also support major offshore wind energy generation, oil and gas production and nuclear power generation. The north west has significant potential for future renewable energy development including tidal lagoons, nuclear and offshore wind energy generation. The development of tidal lagoons could lead to a significant increase in demand for marine aggregates. The north west also has significant potential for shellfish aquaculture development, particularly for mussels. There is also potential for carbon capture and storage.

The north east marine plan areas are important for tourism, ports, nuclear energy and oil and gas production. There is some potential for further offshore wind energy generation, nuclear power generation and carbon capture and storage, but limited potential for marine aggregates, aquaculture or wave and tidal energy development. Oil and gas production is projected to decline significantly over the next 20 years.

The south east marine plan area is important for tourism, ports and offshore wind energy generation. There is potential for growth in the ports sector, nuclear power generation and in shellfish aquaculture.

## **Conclusions and recommendations**

Whilst the projections are likely to not be realised exactly as they are in this report, they provide important consideration of the different directions that each marine plan area could take. As such they are useful for marine planning as they show the range of possible futures developments that could take place, which is useful when drafting plan policies to deliver a particular vision.

## **MMO comments**

This report provides a useful review of possible future projections for marine sectors over timescales of relevance to marine planning. These projections were developed based on current best available evidence assuming no intervention from marine planning.

This report is closely aligned with an MMO project on the [economic baseline of the north east, north west, south east and south west marine plan areas](#) which has already been published.

The futures report will be used as a key input to the development of the north east, north west, south east and south west marine plan areas.