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Port of Ramsgate

High Level Feasibility Study - Final Draft

31st January 2020

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Section 1 - Project Outline & Scope

Project Scope

Outline of project scope and deliverables

Outline Scope

- Thanet District Council (TDC) is seeking advisory services in order to better understand development options for Port of Ramsgate (PoR) and the immediate surrounding area.

Sites

- PoR encompasses two distinct entities: the Royal Yacht Marina & Commercial Port. Both require distinctly sympathetic treatments but a joined-up, cohesive strategy.

Approach Outline

- The study scope requires the coverage of these areas across of a broad range of development areas spanning commercial port operations to real estate. It is intended as the first of a two stage process culminating in an inclusive masterplan for PoR.
- Our approach to this stage of the development process can be summarised in two distinct areas of work:
 - *Strategic: what are the various options available to TDC, how are they aligned with the overall strategy of Thanet, Kent, and the UK, who are key stakeholders in the context of each option and what are their decision making/success criteria*
 - *Analytical: how should potential benefits be measured, what are the sensitivities of each option, where do risks/opportunities exist, do any interdependencies between options exist, how can options be combined to best utilise the available resources to deliver against the goals of TDC*
- This report sets out a long list of options alongside an objective evidence base, and analytical framework to inform detailed option appraisal and, ultimately, management decision making as to how best TDC can deliver improvements across the PoR and its immediate vicinity.
- It delivers against these objectives by collating relevant domestic and international best practices and benchmarks, and analysis of datasets available at the time of writing.
- It does not aim to deliver a detailed appraisal of options which is intended to form part of the masterplanning exercise.

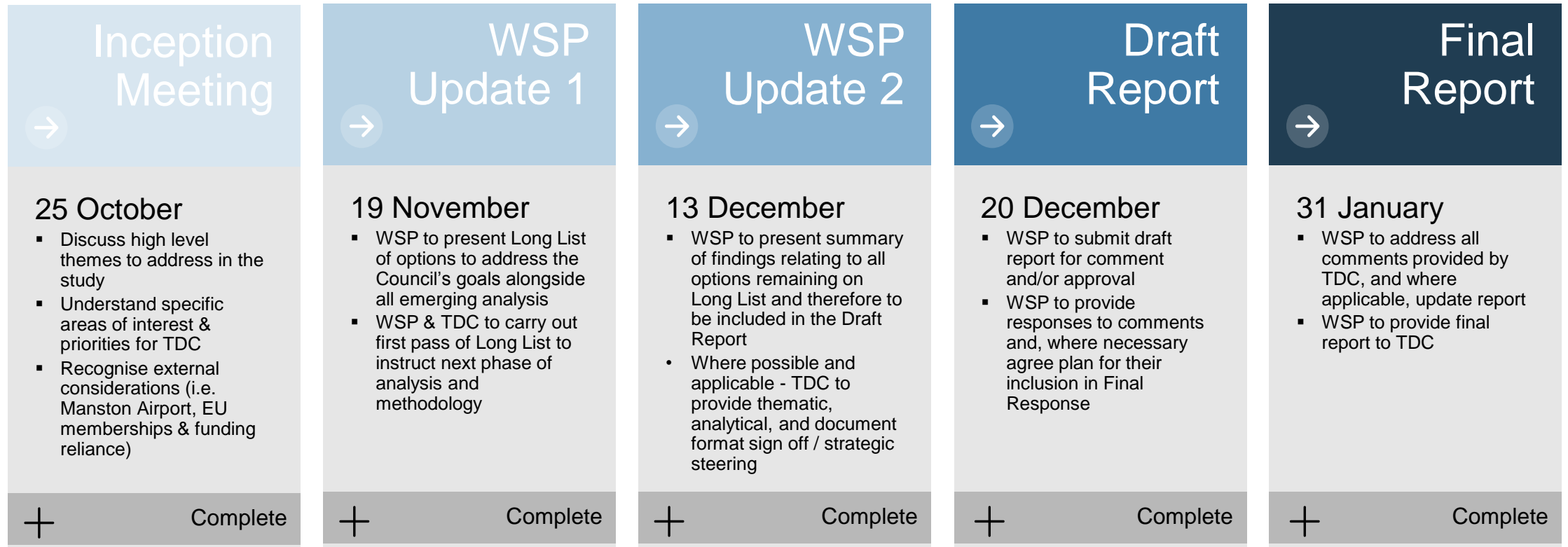
Next Steps

- The planned next step (of TDC) to fully appraise and realise the benefits outlined in this report is a detailed masterplanning exercise. The overall project will be appraised in line with HM Treasury's Green Book framework: this report begins the alignment process of delivering TDC's overarching development goals with these principles by giving all opportunities identified due consideration under the 5 Cases model.

Project Deliverables Plan

Key touchpoints throughout project delivery

5



Section 2 - Executive Summary

Summary of Project Phases

Process in line with HM Treasury Green Book has been followed to identify a likely range of beneficial schemes for further investigation and quantitative appraisal during masterplanning

Establish a Rationale for Intervention

- The Port of Ramsgate is strategically important to the region and the country as whole. It encompasses two zones with unique characteristics and requirements: the Commercial Port and the Royal Harbour. In total it occupies a footprint of 35.6 hectares of prime land close to the town centre.
- The Commercial Port has suffered from three operators incurring financial distress, and ultimately the closure of all ferry routes between Ramsgate and continental Europe. This has left a substantial amount of underutilised land and a material gap in funding. A key financial burden is the depreciation of assets which, while their value can be leveraged in-situ, have limited sell on value.
- There are limited short term prospects, aside from potential for the Port in certain post-Brexit scenarios, which would result in the Port delivering commercial successes. The case for intervention is therefore a strong one, and is being driven by the broad options assessed in the development of this report.

Set Project Objectives

- With such a broad span of development options available to the Council, the project is very much in an embryotic phase, the following objectives are used as working assumptions:
 - *Deliver commercial successes from the Port site, not necessarily from conventional maritime uses.*
 - *Deploy limited capital resources as a catalyst for private sector investment in the Port, town, and wider region.*
 - *Be deliverable without negatively impacting the local environment and without detrimental impact on the high street funding work.*

Develop Options Long List






- Developments have been categorised in to four headline areas: Commercial, Residential, Leisure, and Maritime Village. Sub areas within each of these have been analysed to assess market size, recent trends, and to identify relevant benchmarks upon which a comprehensive Options Long List has been developed.

Assess Options Fit

- All options are assessed against 5 Critical Success Factors as set out in the Treasury's Green Book appraisal guidance:
 - *Strategic fit:* *Fit with other strategies and programmes;*
 - *Economic Case:* *Potential value for money in terms of net social, economic, environmental benefits;*
 - *Financial Case:* *Impact on public sector budget;*
 - *Commercial Case:* *Ability of suppliers to deliver the required services;*
 - *Management Case:* *Delivery plan viability and ongoing management requirements*

Critical Success Factors

Each aspect of the development has been allocated a series of success factors based on current Council policy

		5-Case Drivers				
Area	Objective	Strategic Fit	Economic Case	Commercial Case	Financial Case	Management Case
 Overarching	Identify market opportunities for Port of Ramsgate (PoR) to build on and diversify its revenue base. Build towards a business case assessment	Remain in keeping with existing infrastructure	Social value through new jobs - higher paid employment	Procure and deliver projects safely and efficiently, on time and within budget	Increase net revenues received by Thanet District Council (TDC)	Ensure structures are in place commensurate with scale of requirements
 Commercial	Maritime opportunities Retail opportunities Renewables O&M Manufacturing	Encourage new business activities Diversify revenue streams around harbour & port	Increase employment, productivity, wages, and economic output	Identification, engagement and negotiation (potentially incentivisation) with stakeholders	Positive business case(s) - hurdle rates vary by source of funding	Deliver projects, ongoing management & measurement of benefits realisation
 Residential	Waterside dwellings On-water dwellings	Create an attractive place to live	Attract more people to live in the area, increasing local productive capacity & spending	Dependent on residential model	Dependent on residential model - account for direct benefits of increased population	Dependent on residential model
 Leisure	Yacht market opportunities Hotels & conferences Small cruise ships F&B outlets	Improve heritage & cultural offer Develop leisure, education & community facilities	Attract more visitors to the area, retain resident spending within the area	Develop long term partnerships with operators	Positive business case(s) and/or increased rental/concession income streams	Ongoing planning management required in line with PoR's evolving environment
 Maritime Village	Optimised deliverables package from Commercial - Residential - Leisure categories to best achieve the Overarching goals	Celebrate the town's heritage & culture	Enable maximum benefit to be derived from the above	Long term view & careful strategic planning to avoid conflicting stakeholder interests	Enables maximum benefit to be derived from the above	Careful management of potentially conflicting stakeholder interests

Option Development

A Mixed Use development for the port facility appears to offer the best opportunity for the Port of Ramsgate.

Findings by Area of Assessment

Commercial

Options assessed: Port, Industrial and Retail elements

Options proposed: Ro-ro and development of industrial and O&M space

Key benefits: Low CAPEX required, making use of existing infrastructure; brings large scale employment opportunities

Key disbenefits: Noise; Impact on any residential ambitions

Outcome: Ro-ro prioritisation as the sole commercial port target user.

Primary port operations are to increase through added services and investment, this will have some consequence for alternative facilities but will not overwhelm planned residential and industrial activity.

Leisure

Options assessed: Education facilities, marina developments, hotel/conference facilities, F&B and recreation.

Options proposed: Education initiatives, F&B and marina developments

Key benefits: Socio-economic benefits, complementary services to other mixed use developments such as residential / commercial

Key disbenefits: Not all highest yielding options financially.

Outcome: Leisure offerings to be developed in line with, and approval from council.

Residential (including Maritime Village)

Options assessed: Various styles and scales of residential dwellings

Options proposed: Partial site utilised to create marina-adjacent dwellings as part of a mixed use site with retail and F&B outlets.

Key benefits: Residential developments satisfies the local housing market by increasing and diversifying supply.

Key disbenefits: Commercial operations detract from quality of living, prime plot close to marina requires relocation of existing tenants.

Outcome: Could provide a unique opportunity to develop high quality home offering satisfying housing requirements and stimulate social and economic activity. However site constraints such as the risk of flooding; Crown Estate lease; ground rent; service access and presence of existing customers would create challenges for pure residential development.

Mixed-Use Development

Options assessed: Combination of commercial, leisure, and residential elements proposed.

Options proposed: Retain commercial / industrial port uses with residential and leisure to best utilise the available land area

Key benefits: Multiple parts of Thanet area/society to benefit

Key disbenefits: Tensions between areas e.g. residential - commercial

Outcome: Mixed-Use development incorporating all or a mixture of commercial, leisure and residential has potential to derive the maximum benefit from the whole of the site.

Development Area Recommendations

Nine specific actions have been distilled from the feasibility analysis undertaken in the development of this report.

Proposed Actions

1. The Council's Masterplanning Exercise should focus on a mixed-use development in order to derive the maximum possible benefits from the site. The scope of this should be specific to the unique geographic, social, and economic context of the Ramsgate site. It is likely that this will include a complementary combination of options from commercial, residential, and leisure sectors. Careful consideration must be given throughout appraisal to account for the multiplicative effects (both positive and negative) of such a broad range of developments.
2. Development plans should include the retention of commercial port functions in order that ro-ro operations can be accommodated on a significantly condensed footprint compared to current operations. This enables the predominantly strategic actions list to be explored fully in the short to medium term without negatively impacting the establishment of broader developments focusing on industrial, leisure, and residential schemes.
3. Industrial zones should be prioritised to retain employment land and the scope to deliver a significant jobs boost to the area. Analysis conducted in the development of this report has highlighted a number of growth sectors which thrive in such industrial zones such as: specialist recycling centres, bespoke design studios, and 3D print facilities. Such industrial uses are increasingly inobtrusive as a result of technological improvements and the shifting nature of demand for goods and services.
- 10 4. As part of the industrial zone, retaining space for workshop areas would benefit local entrepreneurship opportunities and foster creative industries in the area. Dedicating space(s) to specialist maritime purposes, such as vessel design / architecture, would aid the retention of the region's long maritime heritage with potential benefits to activities at the commercial port.
5. Relationships with incumbent renewables operations and maintenance companies associated with the London Array offshore wind farm should be built upon to expand the service offering of the port. This should include close understanding of future operations and maintenance patterns such as the development of much larger 'motherships' embarking on multi-day maintenance excursions replacing the current day-long fast boat trips.
6. A significant Royal Harbour expansion can be delivered through the relocation of fishing, and renewables operations and maintenance fleets to currently unused areas of the commercial port. Combined with relatively inexpensive developments, this could enable 5-Anchor status and thus expand the customer base and marketable potential of the Royal Harbour.
7. Residential dwellings are likely to deliver the largest benefits when located on a plot overlooking the Royal Harbour, sufficiently distanced from industrial activities. This; however, necessitates the relocation of the renewables operations and maintenance facilities as well as other enabling infrastructure, the costs of which should be included in any cost-benefit appraisal of such a scheme.
8. Plans to convert the Smack Boys Building in to a hotel and events space are likely to benefit the ambience of the area, and provide a link between industrial/commercial zones and the Royal Harbour, arches retailing, and town centre.

Section 3 - Planning, Policy & Regulatory Review

Planning & Policy Considerations

Overview of planning and policy framework

- In order to understand the parameters within which all developments at the Port of Ramsgate are required to work, a review of seven local policy documents has been undertaken:
 - *Adopted Thanet Local Plan 2006 for a 10 year period*
 - *Draft Local Plan to 2031 (July 2018)*
 - *Economic Growth Strategy for Thanet 2016*
 - *Ramsgate Maritime Plan 2015*
 - *Ramsgate Heritage Action Zone Scheme 2017*; and *High Street Heritage Action Zone Scheme 2019*
 - *National Planning Policy Framework (2018) - Environmental & Coastal Considerations*
- The following pages summarise each of these documents in detail, however key findings are as follows:

Key Policy Conclusions

- The Policy review shows that over many years the vision for Ramsgate port has been the development and economic growth of the port through a wide range of industry opportunities. These opportunities encompass a mix of uses from retail and tourism to heavy industrial.
- New development would need to consider the proximity and interaction between the users as well as their relationship with a range of key protection zones.
- The conservation, maintenance and support of the existing nature of Thanet including its unique heritage and diverse environment.
- Land reclamation not permitted beyond the western extremity of the existing reclaimed land.
- Thanet should be a great place to live, work and invest. Foundational priorities and transformational initiatives are the two key economic deliverables.
- The port's goal of accelerating economic growth to achieve greater productivity and profit for businesses in and around the port, more jobs, and increased prosperity for local residents.
- Ramsgate, as a heritage action zone (as of 2017), requires and receives funding for regeneration work in it's historic area to create economic growth and better quality of life.

Policy Review - Adopted Thanet Local Plan

- The adopted Thanet Local Plan was developed in 2006 by Thanet District Council.
- It's key purpose is to contribute to: the Thanet Development Plan, the detail of planning context and targets (in the form of policies) for future development including residential across Thanet District between 2006 and 2016. The Local Plan also identifies policies to conserve, maintain or support the existing nature of Thanet including its unique heritage and diverse environment.

Adopted Thanet Local Plan 2006 for a 10 year period

- Summary of Local Plan Approach states that one of the four main development proposals in the local Plan is “the promotion of mixed-use developments with an emphasis on leisure and tourism at Ramsgate”.
- Policy EC8 classifies “land at and adjacent to Ramsgate harbour, as indicated on the proposals map, is identified for development for a mixture of leisure, tourism, retail and residential purposes” whilst EC9 addresses that “further development will be permitted at the Ramsgate new port, as shown on the proposals map, if it facilitates the improvement of Ramsgate as a port for shipping, traffic through the port, new routes and complementary land-based facilities”.
- Both highlight the need to consider the adjacent environmental and historic conservation and protection areas, as well as development enhancing the existing offerings at the many business parks in and around Ramsgate.
- Targets for tourism in conjunction with the above economic development policies were also met by the Ramsgate Renaissance Initiative which encompassed several plans and improvements around the port area.

Policy Review - Draft Local Plan to 2031

- The Draft Local Plan to 2031 was developed between 2014 and 2018 by Thanet District Council and is currently subject to Examination in Public with the anticipated consultation closing date in January 2020.
- It's key purpose is to guide and deliver the Council's plans and aspirations for growth in Thanet during the plan period.

Draft Local Plan to 2031 (July 2018)

- The current Thanet draft Local Plan to 2031 highlights development at Ramsgate under Policy SPO9. Similar to the adopted Local Plan policy SP09 has two key areas of interest for development near the port as highlighted below:
- 2) Ramsgate Waterfront and Royal Harbour Land at and adjacent to Ramsgate Royal Harbour, as indicated on the Policies Map, is identified for development for a mixture of leisure, tourism, retail and residential purposes. Any such proposals should have regard to the emerging Ramsgate Maritime Plan or any subsequent plan adopted by the Council. The following activities and development will be supported:
 - Eastern Undercliff - mixed leisure, tourism and residential uses; and,
 - Ramsgate Royal Harbour - continued development of mixed leisure and marina facilities, in particular at the Military Road arches.
- All proposals must:
 - Take particular care in the design, location, use of materials and relationship of land based facilities with open water, such as to protect important views and preserve or enhance the historical character of the Royal Harbour and seafront.
 - Ensure that the integrity of nature conservation interests within the adjacent SSSI, SPA, SAC, Ramsar, Thanet MCZ site is maintained.
- 4) Ramsgate Port -The Council supports further development at Ramsgate Port which would facilitate its improvement as a port for shipping, increase traffic through the port, and introduce new routes and complementary land based facilities including marine engineering, subject to:
 - a demonstrable port-related need for any proposed land based facilities to be located in the area of the port, and a demonstrable lack of suitable alternative inland locations; and
 - compatibility with the character and function of Ramsgate waterfront and the Royal Harbour as a commercial leisure facility; and
 - an acceptable environmental assessment of the impact of the proposed development upon the harbour, its setting and surrounding property, and the impact of any proposed land reclamation upon nature conservation, conservation of the built environment, the coast and archaeological heritage, together with any proposals to mitigate the impact.
- Land reclamation will not be permitted beyond the western extremity of the existing limit of reclaimed land.
- Any development permitted by this policy must not adversely affect any designated nature conservation sites either directly or as a result of increased visitor pressure. All development must comply with policies relating to the Protection of International and European Designated Sites and associated Strategic Access Management and Monitoring Plan.
- The Draft Local Plan also identifies an overarching vision for Ramsgate “to maximise its maritime heritage, Royal Harbour, marina, beach and attractive waterfront, and provide economic base of its vibrant mix of town centre uses, visitor economy and café culture.”
- Important to a wider needs base that may be contributed to by development at the port “Ramsgate has a need for an additional 4,537 square metres of retail floorspace”.
- The Draft Local Plan (SP43, SP44, SP46, SP47) also identifies a number of strategic infrastructure routes throughout the district including two focal areas on the Strategic Road Network (SRN) which is managed by Highways England. Major routes to the port include the A299, A28, A253, A256 and Margate Road of which only the A256 is included within the SRN considerations.
- The other key links are considered within the existing infrastructure overview section of this report.

Policy Review - Economic Growth Strategy for Thanet

- The adopted Economic Growth Strategy for Thanet was developed in 2016 by Thanet District Council with a promise to work closely with key partners and stakeholders, both within the district and more broadly.
- It's key purpose is to set out a vision that Thanet should be a great place to live, work and invest; and that it should grow quickly in economic terms. The plan delivers this under two key strands; foundational priorities and transformational initiatives.

Economic Growth Strategy for Thanet

- The Economic Growth Strategy for Thanet identifies as its number one Transformational Initiative Developing the Port at Ramsgate.
- The strategy identified the development of an initial business case for the port which focussed on the development and optimisation of existing opportunities and port uses including
 - Expanding berthing for the leisure marina
 - Improving facilities and storage that service the offshore renewables sector and a wider “green tech” sector
 - Improve the port's handling capacity
 - Explore opportunities for an off-site logistics hub
- The strategy goes on to outline several key factors in the prosperity of the plan including regional funding and influence structures, implementation strategies, resource availability and the monitoring of key performance indicators (KPIs) through a series of intermediate milestones.
- The management and implantation structure includes of note a dedicated Delivery Group for The Port, and recognises the need to connect with:
 - key private sector businesses with a presence in Thanet (particularly those in the priority sectors);
 - schools, further education and higher education organisations;
 - the existing Costal Community Teams working across the district;
 - existing and potential investors in the area;
 - other public sector bodies with a role in the District – including Kent County Council, government departments, SELEP, Thames Estuary and immediately adjoining local authorities (e.g. Dover, Canterbury).

Policy Review - Ramsgate Maritime Plan 2015

- The adopted Ramsgate Maritime Plan was developed in 2015 through collaboration between the Port of Ramsgate and Thanet District Council.
- It's key purpose is to support the prime regeneration goal of accelerating economic growth to achieve greater productivity and profit for businesses in and around the port, more jobs, and increased prosperity for local residents.

Ramsgate Maritime Plan 2015

- The Ramsgate Maritime Plan reflects an overview of the existing condition and potential opportunities, with respect to European Union (EU) support, for the port extents. Covering everything from marketing and communications to potential funding sources, the plan identifies a group of key opportunity areas for the port as follows:
 - Royal Harbour: seeks to "attract more visitors and to enhance the tourist and leisure experience"
 - Commercial Fishing: seeks to "safeguard" space and "support the development of a specialist fish quay/market, a fish processing capability, a quayside chill store (with ice facility), and an amenity and training / education facility."
 - Ship Repair: considers "the creation of new slipway vessel lifting facilities and covered ship repair facilities in the port area"
 - Ro-Ro Trade (Roll-on, Roll-off): the plan identifies new opportunities in Ro-Ro trade where Ramsgate benefits from extremely short distance to the European mainland, this trade could benefit from fluctuations in fuel prices and other variables (including Brexit).
 - Renewable Energy: there is "offers considerable potential to grow the port's support facilities and increase its geographic reach" to support the UK and EU's offshore wind capacity.
 - Bulk Commodity Trades: states an opportunity to "handle greater volumes" "subject... to the requirement for an alongside berth which the port cannot currently offer". It should be noted that Thanet Council put out for tender in 2019 for the construction of an alongside berth.
 - Cruise: taking advantage of the positive "long term trend in the European cruise passenger market" is an attractive opportunity for the port sitting so close to Europe.

Policy Review - Heritage Action Zone Schemes

- The Ramsgate Heritage Action Zone and High Street Heritage Action Zone schemes are economic regeneration schemes developed between Historic England and local partner's in the delivery area.
- Their key purpose is to unleash the power in England's historic environment to create economic growth and improve quality of life by working with local people and partners to unlock their potential and making them more attractive to residents, businesses, tourists and investors.

Ramsgate Heritage Action Zone

- Ramsgate was designated as a Heritage Action Zone (HAZ) in April of 2017
- A key focus so far around the HAZ has been the research and recognition of Ramsgate's coastal and historical heritage including
 - Historic Landscape Characterisation Study
 - Historic Area Assessment and Informed Conservation publication
 - Aerial investigation and analysis
 - Prehistoric Ramsgate Investigations
- A key milestone for the Ramsgate HAZ was the successful bid for £50,000 from the Coastal Revival Fund. Focussing specifically on the Pulhamite rock garden conservation the successful bid demonstrates the working objectives of the scheme as well as an aspiration for further conservation of Ramsgate's coastal heritage.
- Ramsgate have also been supported by the Heritage Schools Programme creating learning experiences for pupils using local heritage.
- Ramsgate's key partners are Thanet District Council, Ramsgate Town Council, Ramsgate Coastal Community Team and The Ramsgate Society.

High Street Heritage Action Zone

- Inclusion in the High Street Heritage Action Zone scheme identifies a historic high street as a location fit to receive funding from the £92 million of Government funding for High Streets Heritage Action Zones and £3 million from the National Lottery Heritage Fund.
- Ramsgate Highstreet was successfully chosen as one of 69 high streets across the UK in September 2019 after an application by Thanet District Council in partnership with Coastal Community Team and Ramsgate Town Council.
- The proposal included a plan for dealing with some of the larger vacant units in Harbour Street and the lower High Street, working with the owners of the buildings in the town to improve their facades, reviewing the public spaces and identifying opportunities to improve it, as well as engaging with the town's communities to support the regeneration of Ramsgate.
- The aspiration is to improve the area for those that live in the town and to attract businesses and footfall.

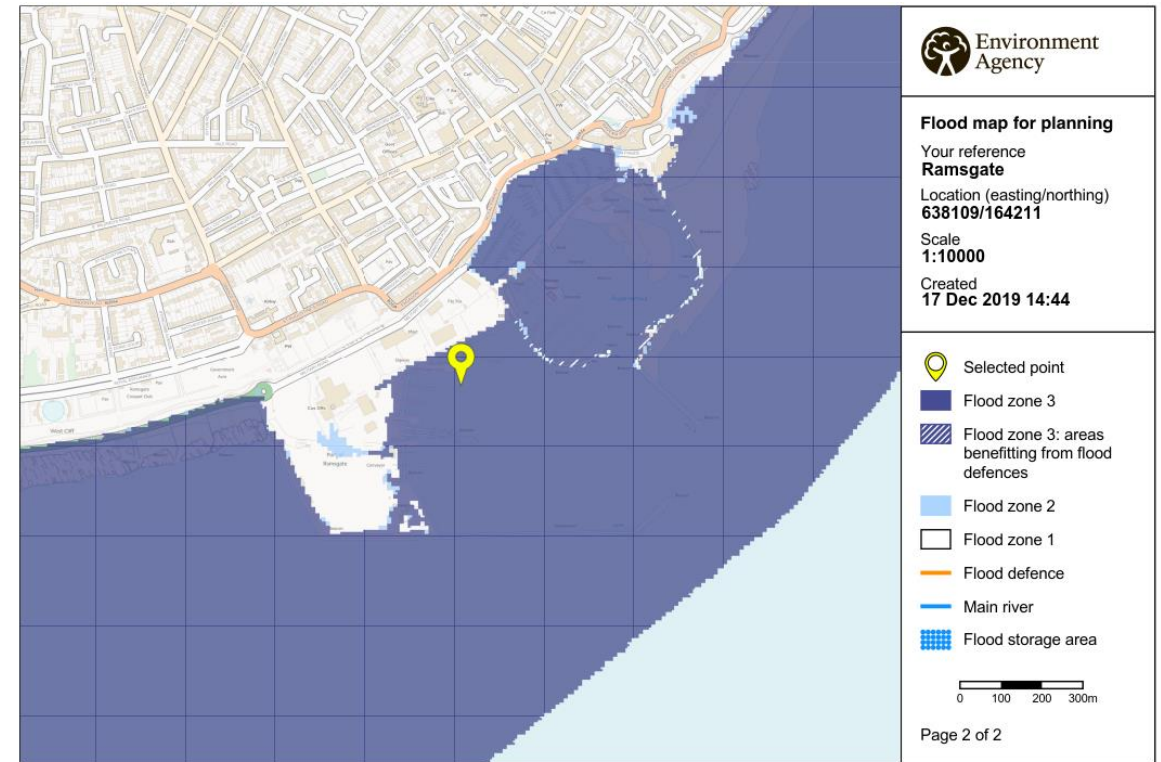
Flood Risk & Coastal Considerations

Various policy documents draw attention to several further considerations in relation to future development at the port centred around its proximity to a range of protection zones as outlined below:

Environmental & Coastal Considerations

- In accordance with the National Planning Policy Framework (2018), development located within Flood Zone 2, Flood Zone 3, in Flood Zone 1 and greater than 1 hectare in size or located in an area identified at risk of flooding would require a Flood Risk Assessment. Where:
 - Flood Zone 1 is land assessed as having a less than 0.1% annual probability of fluvial or sea flooding (1 in 1000 year return period);
 - Flood Zone 2 is land assessed as having between 1% and 0.1% annual probability of fluvial flooding (1 in 100 to 1 in 1000 year return period) or between 0.5% and 0.1% annual probability of sea flooding (1 in 200 to 1 in 1000 year return period) in any year; and
 - Flood Zone 3 is land assessed as having a 1% or greater annual probability of fluvial flooding (1 in 100 return period or greater) or 0.5% or greater annual probability of sea flooding (1 in 200 return period or greater) in any year.
- Some of the Port of Ramsgate site has been identified as being in Flood Risk Zone 2 (land having between a 1 in 200 and 1 in 1,000 annual probability of sea flooding)
- A large part of the commercial port site is leased by Crown Estates to Thanet District Council. The Council has freehold possession of the remainder of the port estate
- The Ramsgate Conservation Area is a large designated area which includes the entire Ramsgate Royal Harbour site. There are also numerous grade II and grade II* listed buildings and features on the Ramsgate Royal Harbour Estate, although there are no listed buildings or features within the confines of the commercial port site.
- The Port of Ramsgate is bounded by a number of designated marine conservation sites.
- Recognising the proximity of the port to the Sandwich Bay and Thanet Coast SSSIs, SPAs, Ramsar Site, Marine SAC and Thanet Marine Conservation Zone (MCZ), development proposals for growth would be subject to the Habitat Regulations and will need sensitive consideration in relation to nature conservation and landscape.
- The Isle of Grain to South Foreland Shoreline Management Plan - Policy Unit 4b 19 (Ramsgate Harbour) is 'Hold the Line' - meaning to maintain the coastal frontage on the same alignment.
- Policy CC03 - Coastal Development
- Proposals for new development within 40 metres of the coastline or clifftop must demonstrate to the satisfaction of the Council that it will not:
 - Expose people and property to the risks of coastal erosion and flooding; or
 - Accelerate coastal erosion due to increased surface water run off before planning permission can be granted".

Environment Agency Flood Zoning in Port Vicinity




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Section 4 - Commercial Development Assessment

Commercial Opportunities - Target Sectors & Objectives

A total of 13 sub-areas fall within the banner of Commercial developments for consideration: most are compatible with mixed use developments but may require special consideration or mitigation measures to be implemented

	Area	Sub Area	Objectives
 Commercial	Maritime	Ro-Ro	Increase volume throughput & deliver ROI
	Maritime	Cruise	Attract new vessel calls & establish market at Ramsgate
	Maritime	Renewables O&M	Maintain & build on successful operations
	Maritime	Automobiles	Establish regular traffic
	Maritime	Vessel Repair & Maintenance	Maintain and/or expand facilities in line with other site demands
	Maritime	Short Sea Shipping (UK)	Attract new vessel calls & establish market at Ramsgate
	Maritime	Dry Bulks (excluding coal & ore)	Maintain and/or expand facilities in line with other site demands
	Maritime	Forestry Products	Attract new vessel calls & establish market at Ramsgate
	Maritime	Project Cargo	Position Ramsgate as first choice for new project imports
	Retail opportunities	Retailing as part of mixed use development	Develop infrastructure which is attractive to retail tenants & residents
	Retail opportunities	Outlet-style retailing/retail park	Drive visitor numbers and prevent leakage of spend to neighbouring boroughs
	Retail opportunities	Duty Free retailing	Develop infrastructure which is attractive to retail tenants & residents
	Industrial Uses	Light and/or medium industry	Develop infrastructure sympathetic to environment but attractive to industry
	Industrial Uses	Workshop spaces	Dedicate areas within development to enable creative industries to flourish in the area



Commercial Port - RoRo

Outline

- The Port currently operates 1x single-deck RoRo berths (vessels up to 160m LOA, 6.5m draft) with dual lane access/egress. Current traffic levels are low and irregular, and depend heavily on inbound overflow demand from nearby port facilities. The Port currently manages inbound cargoes with no recent history of loaded outbound vessel movements.
- Cashflows are accordingly unpredictable which makes efficient, strategic funding and developments more difficult.
- There is potential for fast cross-channel 'duty free' services to be reinstated post-Brexit which are likely to positively impact Port ro-ro operations.

Competition

- Sheerness - Dover - Harwich - Felixstowe

Potential sites / land availability

- The commercial port occupies a 32 acre site with limited scope for expansion. Accompanied trailers require a relatively small plot of land if operated efficiently and managed through pre-bookings only. Fishguard Harbour is an example of such operations to be used as a benchmark for rationalisation options.

Relevant statistics

- UK RoRo statistics - DfT/Eurostat | UK macro environment & future view of manufacturing outputs.

5 cases drivers

- Strategic
 - *Strong fit with strategy to retain maritime heritage, increase local labour demand, and to best-utilise a valuable regional asset.*
 - *Reliable port throughput may also stimulate the market for tangential businesses to co-locate on site.*
- Economic
 - *Social benefit derived from increase in job supply aligned to labour supply dynamic.*
 - *Disbenefits of noise, increased traffic levels, congestion, air quality should all be*

considered when making appraisal decisions.

- Commercial
 - *Several ferry operators are active in the local market to be engaged with, offering customer diversification and/or competition to ensure market rates are realised (i.e. Stenna Line - DFDS - P&O).*
- Financial
 - *Infrastructure is largely in place to enable delivery with minimal capital investment from TDC, albeit this is ageing. Private sector investment from potential operators may supply funding to breach any shortfalls.*
 - *Successful delivery of regular Ro-ro operations are likely to deliver strong, long term revenues.*
- Management
 - *Structures are already in place with sufficient levels of expertise and resource availability, additional traffic may require bolstering of operational team(s).*

Commercial structure(s)

- Commercial agreement between TDC and RoRo operator(s) - requiring TDC to maintain access infrastructure in return for minimum volume throughput.

Sensitivities

- Estimation of the Ports' ability to attract traffic (i.e. propensity of Operators to switch), required incentivisation plans, and existing contractual commitments.

Dependencies

- Sufficient land is retained for commercial port usage.
- Any developments are made in line with local heritage constraints.
- Additional strain on local road network is not deemed prohibitive.

Next steps

- Detailed appraisal of options long list
- Stakeholder outreach to better understand switching drivers & contractual restrictions

Commercial Port - Cruise



Outline

- Ramsgate has attracted the occasional cruise call, most recently from Silversea Cruises (which involved transport of passengers from cruise ship to shore by small boats).
- Previous port masterplan has suggested an alongside vessel quay to attract this market.
- Ramsgate's transport links to London (a primary UK tourist destination and largest population hub) enable it to compete with the nearer London Tilbury international cruise terminal which has been successful in establishing multiple international cruise calls. It also offers close proximity to tourist centres in Canterbury and coastal tourist sites.
- Southampton accounted for 86% of UK cruise passenger volumes in 2017 and 92% in 2018. Southampton is the largest individual cruise port, by passenger traffic, in Europe.
- Opportunities lie in the growth of 'blue tourism', which benefits the marine and leisure sectors (cruises, passenger ferry services) and Ultra-luxury cruise bookings. Sales of these grew 8.5% between 2016 and 2017 (CLIA)

Competition

- Southampton, London Tilbury, Dover, Harwich

Potential sites / land availability

- Requires development of passenger facilities on Port, and additional berth works

Relevant statistics

- CLIA | Eurostat

5 cases drivers

- Strategic
 - *Cruise development is aligned with objectives to drive local tourism, and drive local employment through associated industries.*

Economic

- *Cruise tourism can bring direct benefits to multiple sectors of local community such as: taxi; public transport; retail; food and beverage outlets; museums; local tour operators; port terminal staff.*

Commercial

- *AIS analysis has been undertaken to establish the number of operators within a polygon around the East Coast of England. While many will be out of scope for Ramsgate, there appear to be a large number of operators (82 active over the summer peak of 2019) to discuss the opportunities afforded by Ramsgate.*

Financial

- *Financial structures will be similar to those of commercial shipping, with operators paying for infrastructure availability through minimum guaranteed volumes.*

Management

- *Volume dependent: management structures may require bolstering to manage large vessels.*

Commercial structure(s)

- Investment could be derived from private sector, but would impact revenue achievable.

Sensitivities

- Highly sensitive to travel trends, macroeconomic context (i.e. disposable income availability), and viability of competition.

Dependencies

- Sufficient land is retained for commercial port usage
- Developments in line with local heritage constraints
- Additional strain on local road network from tour operators is not prohibitive

Next steps

- Stakeholder outreach programme and detailed analysis of vessel calls at competing ports via AIS assessment.

Commercial Port - Renewables O&M Summary



Outline

- Ramsgate has operated O&M services for the Vattenfall Thanet Offshore Wind Farm (100 turbines) since 2010. Since 2012 Ramsgate began O&M for Eon/Orsted London Array Offshore Wind Farm (175 turbines).
- O&M requires an operations / control facility, stores for smaller spare components / consumables, a terminal for offshore technicians (briefing and meeting rooms, welfare facilities, etc), and sea access for O&M vessels.
- As of December 10th 2019, the ongoing plan sent to the UK department for business, energy, and industrial strategy, to expand the Vattenfall Thanet Offshore windfarm of up to 34 new wind turbines on the edges of the current site has been delayed.

Competition

- Competition zones are heavily dependent on the location of wind farms. Other ports in the region which offer similar opportunities, in general, to Ramsgate are: Brightlingsea, Harwich, Whitstable, Great Yarmouth, Newhaven, Lowestoft.

Potential sites / land availability

- Current sites are fit for purpose but may be better utilised by other developments and therefore require relocation. Potential for relocation of offshore vessel berths to provide easier access would deliver benefits.

Relevant statistics

- Department for Business, Energy & Industrial Strategy published data.

5 cases drivers

- Strategic
 - Consistent, reliable revenue and diversification of traditional commodity port operations provides extra stability to the port as a business entity: safeguarding the land as a key source of employment in the local region.
- Economic
 - Direct benefits are derived from long term employment opportunities derived from

the operations and maintenance of offshore wind farms. Secondary benefits could be achieved by attracting a greater share of construction / manufacturing of parts than is currently being undertaken.

- Commercial
 - *Incumbent operators*
- Financial
 - Investment in infrastructure is largely undertaken by private operators, and returns to the Council reflect the low risk profile of its role in this industry. The key financial consideration is therefore the opportunity cost of the land footprint in the event that high value opportunities are identified in future.
- Management
 - Structures are already in place with sufficient levels of expertise and resource availability.

Commercial structure(s)

- Investment to follow O&M contract winning. Nature of O&M does not require specialist infrastructure and space can be easily converted/assigned for O&M bases.

Sensitivities

- 24/7 access requirements may be to secondary developments on site.

Dependencies

- Developments in line with wind farm operation. Lifespan of offshore turbines expected to be ~20 years.

Next steps

- Assess options to expand service offering to incumbent operators and align this with future offshore maintenance developments (such as larger ships undertaking longer maintenance operations rather than single-day tours). Limited scope exists to attract O&M operations from future planned offshore wind farms due to their proximity to competition.



Commercial Port - Vessel Repair & Maintenance

Outline

- The Ramsgate Harbour Slipways Ltd facility has three historic slipways which are listed and operated on a commercial basis. Introducing more modern slipways have been cited in the port maritime plan in 2015 with the aim of increasing the scope of vessels which can be maintained on-site.

Competition

- Southampton SMS – Mobile repair vessel stationed on Thames, A&P at Great Yarmouth

Potential sites / land availability

- Renovation of ageing slipways enable the retention of the current operational and commercial scope; or
- Development of new slipway(s) / hoist facilities on the current commercial port zone, accompanied by larger yard/warehouse space for repair and maintenance facilities may increase the scope of vessels which can be handled.

5 cases drivers

- Strategic
 - *Strong fit with strategy to retain maritime heritage, increase local labour demand, and provide value-added services which increase the attractiveness of Ramsgate for its primary maritime purposes.*
- Economic
 - *Social benefit derived from employment opportunities; impact will be scaled in line with the scale/scope of the facility under current versus expansion plans.*
- Commercial
 - *Significant number of vessel operators active in the market currently undertaking long voyages to attend vessel repair and maintenance facilities in mainland*

Europe. Captive market also provided by marina traffic, fishing fleet, and offshore wind O&M operations.

- Financial
 - *CAPEX requirement is likely to be significant to expand facilities to enable repairs and maintenance of large vessels. However, investment from the privates sector may be available to develop such a facility.*
- Management
 - *It is anticipated that the facility, in any format, will be operated by a third party and will require minimal additional management.*

Commercial structure(s)

- Investment likely to come from private operator(s) with typical landlord-tenant agreement ensuing.

Sensitivities

- Highly sensitive to competition, skill availability, and trends in boatbuilding. Smaller scale facilities are also sensitive to boat ownership trends and occupancy in the marina.

Dependencies

- Developments in line with local heritage constraints
- Sufficient land retained in port to accommodate a more significantly sized facility than is present today.

Next steps

- Detailed assessment of competition in the area, and stakeholder engagement to better understand larger vessel repair and maintenance dynamics.

Commercial Port - Short Sea Shipping/Coastal Shipping (UK)



Outline

- Short sea shipping/ coastal shipping is a way for Ramsgate to access other UK markets. Generally, if congestion begins to limit port growth, highway capacity is inadequate, and the network is operating inefficiently (i.e. with high levels of congestion and delay), then short sea shipping could be considered as an option to redistribute port traffic throughout the UK.
- Generally, the opportunity for short sea shipping around the UK is not an evident requirement. The factors here mentioned are not currently being experienced, there appears to be no significant benefit of introducing short sea shipping.

Competition

- Shoreham, London Medway

Potential sites / land availability

- The commercial port occupies a 35.6 acre site with limited scope for expansion

Relevant statistics

- DfT

5 cases drivers

- Strategic
 - *Bolster nationwide reputation and retain maritime significance*
 - *Boost regional UK industry and nationwide collaboration*
- Economic
 - *Disbenefits of noise, increased traffic through town, congestion, air quality*
- Commercial
 - *Little commercial requirement*

- Financial
 - *Limited financial input required though funding, more through resource time*
- Management
 - *Manageable by existing teams, marketing team to drive process*

Commercial structure(s)

- Establish and managed communication with local enterprise

Sensitivities

- Traffic and commerce transporting through town can be disruptive to local residents

Dependencies

- Hinterland business providing sufficient demand for coastal product distribution, in enough quantities to make short sea shipping feasible

Next steps

- Detailed appraisal of options long list
- Stakeholder outreach to better understand local and nationwide dynamics

Commercial Port - Dry Bulk (Excluding Steel, Iron, Coal, & Ore)



Outline

- Ramsgate has the capacity to handle a large range of dry bulk commodities. Albeit inconsistent, the commercial port has traffic reaching over 70,000 tons per year. The current dry bulk berth concession will potentially continue up until 2054.

Competition

- London Medway is the prominent dry bulk port in the region, covering 96% of the SE regions traffic in 2018.
- Dover has historically attracted significant volumes (224,000 tons in 2000). Steady declines from 2011 to no volumes in 2015 & 2017. Currently going a dock renovation project, in 2018 Dover attracted 50,000 tons, which can be the start of returning to its former large volume levels.

Potential sites / land availability

- The commercial port occupies a 32 acre site with limited scope for expansion

Relevant statistics

- DfT

5 cases drivers

- Strategic
 - *Valuable for local industrial commerce*
 - *Contracts for dry bulk goods can be mid to long term*
- Economic
 - *Social benefit of labour force*
 - *Disbenefits of noise, increased traffic through town, congestion, air quality*
- Commercial

- *Low CAPEX involved as infrastructure exists*

Financial

- *Net financial position taking account of required costs and demand/revenue which can be achieved*

Management

- *Structure already in place to manage commodity specific requirements*

Commercial structure(s)

- Investment likely to come from private operator(s) and/or
- Long run, stable revenue streams offset by any depreciation in capital investments required

Sensitivities

- Physically and environmentally unattractive commodity with likelihood of bulk products spilling into atmosphere

Dependencies

- Sufficient land is retained for commercial port usage
- Additional strain on local road network is not prohibitive

Next steps

- Research any major construction in short or medium term – affect volumes of cement, aggregates and project cargo and can approach construction companies to offer services`

Commercial Port - Forestry Products



Outline

- Historically the port has not handled bulk forestry products. The market hinterland is very limited compared to the competing facilities which are located closer to the UK's major forest product importers and to the largest population centres.

Competition

- Medway – London - Shoreham

Potential sites / land availability

- Port has limited land availability for handling and covered/open storage facilities. Requires value adding nearby primary and secondary processing facilities (e.g. for treatment of timber, manufacturing sawn timber products) from private investment.

Relevant statistics

- UK Forestry products statistics | DfT

5 cases drivers

- Strategic
 - *Fits in line with port's future vision of seeking opportunities for handling new business in bulk commodity trades.*
- Economic
 - *The processing activities at all stages of supply/manufacturing add value to society by providing jobs*
- Commercial
 - *Cranes and therefore CAPEX likely required to attract new customers*
- Financial
 - *Net financial position taking account of required costs and demand/revenue which can be achieved*

Management

- *Structure already in place to manage bulk commodities but new understanding/training would need to be undergone to ensure an understanding of the forestry product requirements at the port*

Commercial structure(s)

- Investment likely to come from private operator(s) and/or

Sensitivities

- Noise from commodity movements disruptive – dust from products to spill / carry with wind

Dependencies

- Sufficient land is retained for commercial port usage
- Additional strain on local road network is not prohibitive
- Sufficient local market demand.

Next steps

- Stakeholder outreach to better understand switching drivers & contractual restrictions
 - E.g. Importers such as Consolidated Timber Holdings, UPM and others.



Commercial - Industrial Uses

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Outline

- Workshops spaces, light and medium industrial spaces can be built in to either a mixed use scenario alongside - and potentially complementary to - commercial shipping, or residential land uses. Industry is increasingly inobtrusive owing to technological improvements and the shifting nature of goods and services being demanded.
- Workshop spaces are increasingly provided in modular formats to maximise flexibility to end users. Key target sectors include specialist printers, prop design, architect/design office functions. Typical unit sizes are developed in the region of 100sqm.
- Light industrial uses range from 3D printing facilities and distribution centres to vehicle repair and specialist recycling centres. Typical unit sizes are developed in the region of 500-2000sqm.
- Medium industrial uses range from construction services, workshops, and trade outlets, to food production and goods manufacturing. Typical unit sizes are developed in the region of 2000-5000sqm.
- Industrial space in Kent specifically has been under pressure in recent years, which has pushed rents up to roughly £990/sqm.

Competition

- Pysons Road industrial estate is located to the north of the Port and occupies a total area of c.190,000 sqm. Units range in size from 500 to 5,000sqm
- To the west, Manston Business Park houses light industry and modular office space.
- Thanet Reach, Eurokent and Hedgend Business Parks also provide industrial and office space.

Potential sites / land availability

- Depending on the co-location of other industries and retention of commercial shipping, industrial offerings can be scaled from small to large business park within the footprint current occupied by the Port.
- Units may be stacked if required and design is agreeable from a planning perspective.
- Units may also be designed to provide an audio/visual barrier between residential and heavy industrial land uses co-located on the plot.

Relevant statistics

- Generic build costs (to be refined at a later stage of feasibility study), market rental rates.

5 cases drivers

- Strategic
 - *Retaining industrial land in its primary form ensures the retention of low-skilled labour and is therefore a strong strategic fit with the overarching objectives to boost employment. Economic*
 - *Thanet Plan sets out objectives to deliver nearly 20,000sqm of industrial space a year.*
- Commercial
 - *Thanet District Council would be responsible for leasing plots via competitive tender. Day to day management of sites and operations would fall to private sector.*
- Financial
 - *Strong market for industrial space currently driven by large volumes of land being utilised for residential purposes, especially in major urban centres*
- Management
 - *TBC after market sounding exercise*

Commercial structure(s)

- Likely to result in landlord-tenant relationships between TDC and private operators. Capital investment can come from either party pending negotiation and market conditions.

Sensitivities

- Sensitive to private sector market demand and availability of labour in the vicinity

Dependencies

- Can operate independently or co-located with other land uses

Next steps

- Engage with real estate agent to conduct market sounding exercise



Commercial - Office Uses

Outline

- Opportunities exist for co-locating office space with either residential or other industrial uses at the Port of Ramsgate site. The general trend within office space markets appears to favour town centre locations which are in relatively short supply, thus pushing up rents over the course of 2019 in the region of 4% on the prior year. The growing start up sector is also increasing demand for serviced spaces provision.

Competition

- Local business parks, town centre locations, nearby towns and cities with strong transport connections such as Ashford.

Potential sites / land availability

- Office space would be developed as part of a mixed use development as demand is unlikely to satisfy the entire site. Optimal locations would be away from heavy industry.

Relevant statistics

- Kent office market statistics

5 cases drivers

- Strategic
 - *High quality office space attracts highly skilled employment opportunities which is not directly aligned with the resident labour force in its current position. Recently new developed space in Ashford has been let to consultancy and architecture firms.*
- Commercial
 - *Office space in the south east appears to be in demand with rents increasing year on year. Detailed market outreach would be required to understand demand and likely uptake in more detail.*

Financial

- *Rents in the region of £180/sqm are realistic under current market conditions; and would be likely deliver generally stable income streams for the Council if let directly.*

Management

- *Depending on commercial structure selected, the Council would either be required to assume a landlord relationship with tenants, or manage developments through planning outlines and procurement processes.*

Commercial structure(s)

- A typical landlord-tenant relationship would require day to day management by the council under traditional lease terms, this could be outsourced at a cost. Alternatively, plots could be sold to developers for private management.

Sensitivities

- Sensitive to surrounding site uses and age / educational demographics of surrounding area.

Dependencies

- Office spaces are dependent on availability of suitably qualified workforces and/or transport connections to other major business centres such as London.

Next steps

- Engage with real estate agent to conduct market sounding exercise.



Commercial - Retail Uses

Outline

- Retailing opportunities vary from large scale outlet-style centres such as that at Ashford, to small scale offerings complementary to residential / office / industrial developments on the site.

Competition

- Competition is dependent on the type of retailing being proposed, but generally more impulsive retail sites will compete with the high street, whilst retail based on planned trips will compete with other out of town shopping centres/outlet centres. Specific examples include Westwood Cross and Ashford Designer Outlet retail parks.

Potential sites / land availability

- The nearby Ashford Designer Outlet occupies a footprint of ~75,000sqm excluding car parking, equivalent to the entire operational Port of Ramsgate footprint today. Smaller scale retail parks such as that at Eastbourne Sovereign Harbour occupy footprints of c. 30-40,000sqm. More bespoke retail services would likely be incorporated in the ground floors of residential properties requiring no footprint of their own.

Relevant statistics

- Thanet population and demographic composition | Thanet floorspace capacity.

5 cases drivers

- Strategic
 - *Specific targets for retailing primarily relate to the reduction vacant retail units in town centres and reduction in leakage of comparison goods to the surrounding area. Retail park development would likely benefit leakage targets but damage high street offer by increasing the volume of local competition. More generally, retail adds to the supply of employment in the town which is a key target for the Council.*
- Commercial

- *Thanet District Council would be responsible for long leases of plots via competitive tender. Day to day management of sites and operations would fall to private sector.*
- Financial
 - *The retail sector has experienced difficulties in recent years mainly driven by the rise of online shopping; however, investments are still taking place with caution in the sector. Financial return would be governed by market conditions which appear to return c.£100 per sqm based on figures noted by Caxtons' Property Market Analysis.*
- Management
 - *Requires council planning and procurement exercise, minimal long term management obligation as likely to be delivered by private sector.*

Commercial structure(s)

- Likely to be delivered through private sector, with development controlled by the Council through planning and procurement processes.

Sensitivities

- The compatibility of trends towards independent shop and restaurants should be taken in to consideration as well as the provision of out of town style retail parks in the immediate vicinity of this plot.
- Sensitive to economic conditions in the surrounding town and wider region as well as competition and government regulatory guidelines.

Dependencies

- Retail parks depend on significant car parking availability and easy road access which needs to be taken in to account with development of large scale options.

Next steps

- Engage with real estate agent to conduct market sounding exercise.

Commercial Options Long List 1

Summary of options long-list under consideration



Sub Area	Option ID	Option Action	Shortlist
Ro-Ro	Co_RR_01	Short term tariff reduction / discount plan combined with concise marketing / customer outreach plan	X
Ro-Ro	Co_RR_2	Further dredging	
Ro-Ro	Co_RR_3	Infrastructure improvements	
Ro-Ro	Co_RR_4	Customer service developments	
Ro-Ro	Co_RR_5	Develop complementary facilities for RoRo users	X
Ro-Ro	Co_RR_6	Joint Manston Airport masterplan to increase / improve capacity / customs processing	X
Ro-Ro	Co_RR_7	Driver training programmes	X
Ro-Ro	Co_RR_8	Reefer traffic opportunities and facility requirements	
Ro-Ro	Co_RR_9	Value-added services on-site	
Ro-Ro	Co_RR_10	Facility reductions	X
Cruise	Co_CR_01	Cruise specific terminal	
Cruise	Co_CR_02	Direct bus link to Kent / London tourist sites	
Cruise	Co_CR_03	Regional links to touristic sites	
Cruise	Co_CR_04	Strengthen local and regional touristic highlights	
R O&M	Co_OM_01	Training programmes for Renewables O&M	
R O&M	Co_OM_02	Develop further value-added services on-site	X
R O&M	Co_OM_03	Further segregated, priority berthing for offshore renewables service vessels	
R O&M	Co_OM_04	Encourage government / local renewable policy	
R O&M	Co_OM_05	In-port servicing for of offshore vessels	X

Sub Area	Option ID	Option Action	Shortlist
Motor V	Co_MM_01	Short term tariff reduction / discount plan	
Motor V	Co_MM_2	Further dredging (approach channel depth & width)	
Motor V	Co_MM_3	Superstructure improvements	
Motor V	Co_MM_4	Customer service developments	
Motor V	Co_MM_5	Bonded warehouse/zone offering	
Motor V	Co_MM_6	Explore facility reductions	
Repair & M	Co_VM_01	Concise marketing/customer outreach plan for vessel repair and maintenance	X
Repair & M	Co_VM_02	Synergise with nearby Port/Marina operations which do not have the same scale of facilities on offer at Ramsgate	X
Repair & M	Co_VM_03	Update current slipways	
Repair & M	Co_VM_04	Develop new, larger Slipways and repair facility	X
Repair & M	Co_VM_05	Develop significantly facility at new location	
Repair & M	Co_VM_06	Rationalise Slipways and vessel repair/maintenance offering	
Short Sea	Co_SS_01	Specialist short sea shipping berth / terminal	
Short Sea	Co_SS_02	Utilise Manston Airport site	
Short Sea	Co_SS_03	Establish links with UK business / industry requiring commodities from South East	
Short Sea	Co_SS_04	Locate shippers and test drivers of demand	
Short Sea	Co_SS_05	Short term tariff reductions / discount plan for short sea shipping	

Commercial Options Long List 2

Summary of options long-list under consideration



Sub Area	Option ID	Option Action	Shortlist
Dry Bulk	Co_DB_01	Tariff reduction / discount plan	
Dry Bulk	Co_DB_02	Further dredging	
Dry Bulk	Co_DB_03	Superstructure improvements	
Dry Bulk	Co_DB_04	Customer service developments	
Dry Bulk	Co_DB_05	Complementary facilities for dry bulk users	
Dry Bulk	Co_DB_06	Joint Manston Airport masterplan to increase / improve capacity / customs processing	
Dry Bulk	Co_DB_07	Driver training programmes	
Dry Bulk	Co_DB_08	Dry bulk traffic opportunities and facility requirements	
Dry Bulk	Co_DB_09	Value-added services on-site	
Dry Bulk	Co_DB_10	Facility reductions	
Reefer	Co_RE_01	Short term Introductory low rate	
Reefer	Co_RE_02	Further dredging	
Reefer	Co_RE_03	Superstructure improvements	
Reefer	Co_RE_04	Customer service developments	
Reefer	Co_RE_05	Complementary facilities for Reefer users	
Reefer	Co_RE_06	Efficient number of Reefer plugs	
Reefer	Co_RE_08	Reefer traffic opportunities and facility requirements	
Reefer	Co_RE_09	Value-added services on-site	
Reefer	Co_RE_10	Facility reductions	

Sub Area	Option ID	Option Action	Shortlist
Forestry	Co_FP_01	Further dredging	
Forestry	Co_FP_02	Facility reductions	
Forestry	Co_FP_03	Establish links with relevant UK business	
Forestry	Co_FP_04	Tariff reductions / discount plan	
Forestry	Co_FP_05	Traffic opportunities and facility requirements	
Forestry	Co_FP_06	Superstructure improvements	
Forestry	Co_FP_07	Value-added services on-site	
Office	Co_OT_01	Maritime Academy	
Office	Co_OT_02	Office space to support the development of the maritime industry in line with DfT strategy to 2050 (Maritime 2050) such as Vessel Architects	X
Retail	Co_OT_03	Duty Free Shopping	
Retail	Co_OT_04	Outlet Shopping	
Industrial	Co_OT_06	Develop light and medium industrial units	X
Industrial	Co_OT_07	Develop distribution hub/bonded warehousing offering	X
Industrial	Co_OT_08	Develop workshop spaces for creative industry	X

Commercial Shortlist Detail

Ten options are proposed to be shortlisted; commercial shipping developments focus on RoRo owing to existing infrastructure while opportunities to develop industrial spaces and build on incumbent renewables O&M sector



Commercial opportunities generally deliver the highest financial returns of all those which have been assessed as part of this study. They also align strongly with the Council's objective to retain employment space, and deliver jobs which are equally well aligned to the current and projected demographic of residents.

Development options naturally favour best-utilising existing infrastructure and natural privileges of the site. Deep water, robust breakwaters, and Ro-Ro ramps lend the site well to delivering revenues from this aspect of core business over other forms of commercial shipping which would require investment in additional crane and/or berth infrastructure.

Renewable energy operations and maintenance companies are also targeted for additional revenue streams. While servicing additional wind farms is unlikely due to their proximity to other port facilities, the nature of their servicing is evolving with larger vessels deployed for longer periods than currently seen.

The development of further vessel repair and maintenance facilities are also targeted due to a lack of local competition and availability of labour,(especially if developed in conjunction with educational facilities), land and water. Investment in crane infrastructure could also double for loading / unloading cargo from vessels as a secondary purpose, enabling opportunistic cargo management from the Port.

All commercial port related activities are benchmarked against the recent experiences at Port of Sunderland which can be used as a test-case for turning a commercially-failing port asset in to one which adds significant value to the local economy through its primary purpose.

Other industrial uses, both complementary and independent to the port assets, are also important considerations. Modern light industry (such as office, workshop spaces, 3D printing, distribution centres, film studios) and medium industry (construction services, trade outlets, food/goods manufacturing) are increasingly green, quiet, and inobtrusive. They are therefore able to coexist with residential developments, enabling a highly diverse portfolio to be developed on the Port site.

Sub Area	Option ID	Option Action	Rationale	Considerations & Next Steps
Ro-Ro	Co_RR_01	Short term tariff reduction / discount plan	Sector demand is strong and Ramsgate is equally well positioned to handle cross-channel flows as its significantly more active competitors. A short term tariff reduction would incentivise new customer switching behaviour & attract more cargoes from existing users. Tariffs can be supplemented by performance KPI-driven add-ons to minimise indirect costs to PoR.	Full competitor review and customer/agent outreach programme.
Ro-Ro	Co_RR_5	Invest in complementary facilities for RoRo users - accompanied & unaccompanied trailers, drivers' facilities etc.	Simple facilities such as bath/washrooms, eating, and sleeping offerings drives satisfaction of Port users and may remove overhead costs from truck companies if they shift operations via Ramsgate	Benchmark of facilities, differentiators and stakeholder outreach to understand operational benefits from providing these services
Ro-Ro	Co_RR_6	Develop joined up masterplan with Manston Airport to increase technical holding capacity at PoR / smooth customs processing	Create economies of scale for port users on par with direct competition	Understand logistics supply chains and requirements / potential users to engage with

Commercial Shortlist Detail

Ten options are proposed to be shortlisted; commercial shipping developments focus on RoRo owing to existing infrastructure while opportunities to develop industrial spaces and build on incumbent renewables O&M sector




Sub Area	Option ID	Option Action	Rationale	Considerations & Next Steps
Ro-Ro	Co_RR_7	Invest in driver training programmes / centres of excellence	HGV drivers are increasingly low in supply, creating a local pool of drivers would likely increase the attractiveness of the port as a RoRo hub and thus drive volumes	Review current HGV driver shortages, training schools/operations, and engage stakeholders
Renewables O&M	Co_OM_05	Develop in-port servicing for of offshore vessels with combined and simplified commercial terms to reduce management time required from	Direct revenue driver, plus local employment boost. Indirectly assists with competitive positioning of Ramsgate as the primary offshore wind servicing hub in the South East	Stakeholder outreach and assessment of commercial structures currently in place between maritime facility owners/operators and offshore wind O&M companies
Repair & Maintenance	Co_VM_02	Explore synergies with nearby Port/Marina operations which do not have the same scale of facilities on offer at Ramsgate	Direct revenue driver, local employment boost, indirect marketing opportunities to boost market shares with potential to convert customers to primary Port offerings	Detailed market review and understanding of Ramsgate differentiators and depth of service offering. Conduct B2B stakeholder outreach programme
Repair & Maintenance	Co_VM_04	Develop new, larger Slipways and repair facility	Attract larger size vessels which in turn, can raise presence of Ramsgate, provide more engineering roles and economic income for local region	Determine volume and size ranges of vessels in the hinterland of Ramsgate. Scope out existing facilities, interview ship operators to understand propensity to switch ship repair location
Office	Co_OT_02	Office space to support the development of the maritime industry in line with DfT strategy to 2050 (Maritime 2050) such as Vessel Architects	Office leases offer long run, stable cashflows to TDC, defining the tenant mix to support local maritime industry would retain the region's heritage and support complementary industries (such as vessel repair / maintenance / design / construction etc.) at the Port	Can be complementary to options retaining commercial use of the port for maritime purposes and/or residential options. Generally low visual impact associated with sympathetically designed office spaces
Industrial	Co_OT_06	Light Industrial Uses	Industrial land is generally productive for employment and should be protected in line with current policies. Development of land currently underutilised could be repurposed to attract industry to the area.	Consider noise and ambience impact when co-location with residential is proposed. Necessitates the loss of land for traditional port activities.
Industrial	Co_OT_07	Develop distribution hub/bonded warehousing offering	Low cost development increases the attractiveness of the Port for primary commercial uses while also working as a standalone commercial entity. Would increase the stock of local jobs and could bring agglomeration effects	Land requirement may not be compatible with large scale port operations. Warehousing is generally not aesthetically pleasing, and therefore may detract from the natural beauty of the area. Reputational impact of Amazon (or equivalent) employment ethics may transfer to TDC Need to assess supply chain dynamics and gauge operator interest

Section 5 - Residential Development Assessment

Residential Areas of Interest

A total of 7 sub-areas fall within the banner of Residential developments for consideration: all sub areas aside from a large scale housing development complement mixed use development.

	Area	Sub Area	Objectives
 Residential	Pure Residential	Large scale, predominantly detached, housing development - some of which to include vessel berths - in line with Eastbourne Sovereign Harbour	Develop a new, large scale - low density housing project including addition of executive homes
	Pure Residential	Large scale flats/apartments development - in line with developments at Portsmouth / Eastbourne	Develop a new, large scale - high density housing project including addition of executive homes
	Mixed Use	Stacked mixed use development - combining light industry with residential properties above	Develop both residential and light industrial opportunities on a highly efficient land use basis
	Mixed Use	Stacked mixed use development - combining medium industry with residential properties above	Develop both residential and medium industrial opportunities on a highly efficient land use basis
	Mixed Use	Adjacent mixed use development - combining light industry with residential properties alongside	Develop both residential and light industrial opportunities on a less efficient land use basis
	Mixed Use	Adjacent mixed use development - combining medium industry with residential properties alongside	Develop both residential and medium industrial opportunities on a less efficient land use basis
	Mixed Use	Mixed use development - combining retailing with residential properties alongside	Develop both residential and retailing opportunities on a highly efficient land use basis by utilising ground floor plots for retail

Residential Development - Opportunity Analysis

Residential developments are possible in both high and low density forms, and as a sole proposition or alongside industrial or residential uses



Outline

- In a scenario where the decision is taken to either develop a mixed use site at the Port, or redevelop the entire site in favour of residential dwellings, opportunities exist for the council to add to the local housing stock.
- From 2017 to 2022, Thanet District Council estimates of deliverable housing total 5,558, rising to 6,143 when windfalls and empty homes being brought back in to use are included in the estimates.
- Actual dwelling completions over the past 10 years have averaged 460 according to official statistics.
- A target minimum density of 35 dwellings per hectare is in place to ensure relatively scarce land is efficiently utilised for the wider benefit of the area. While exceptions are to be made in circumstances where an area's character would be detrimentally affected by high density housing schemes, this is nevertheless a useful benchmark. Historically, the average density of delivered housing schemes is 81 dwellings per hectare.
- If residential developments are selected, there is an option to expand the site in to the commercial port area requiring land reclamation.

Similar Developments

- Eastbourne | Portsmouth | Dover (in development) | Sunderland

Potential sites / land availability

- Partial or entire development of current Port land is possible. Considerations under mixed use scenarios should take account of the types and proximity of planned commercial/industrial land uses

Relevant statistics

- Census 2011, Thanet Local Plan Monitoring Report

5 cases drivers

- Strategic
 - *Increasing housing supply generally fits directly with the Council's strategy to*

deliver a net increase in the forthcoming years. The mix of unit sizes and density should be carefully considered to best utilise the land; however, provision of more 'executive homes' is specifically included in the Thanet Local Plan. The waterside location could be effectively leveraged to deliver maximum value from such property types.

- Economic
 - *Increasing housing stock adds economic value across a wide number of factors; from capital investment being retained domestically through local suppliers to providing stable environments for populations to thrive.*
- Commercial
 - *Council responsible for fair competitive procurement process throughout land acquisition*
- Financial
 - *Direct revenue to council from land sales and council tax receipts, indirect revenues from increased local expenditure*
- Management
 - *Development consents and monitoring to be undertaken by the Council*

Commercial structure(s)

- Delivered through private sector under consents and monitoring from Council

Sensitivities

- Size / density of plots, compatibility with industrial uses, consideration of alternative/competing development sites

Dependencies

- Availability of schools and secondary infrastructure to facilitate a large influx of residents

Next steps

- Engage property expertise to undertake market study in order to better understand demand profile from a user and developer perspective

Residential Options Long List

Summary of options long-list under consideration



Sub Area	Option ID	Option Action	Shortlist
Residential Only	RE_01	Large scale, predominantly detached, housing development - some of which to include vessel berths - in line with Eastbourne Sovereign Harbour	
Residential Only	RE_02	Large scale flats/apartments development - in line with developments at Portsmouth / Eastbourne etc.	X
Mixed Use Development	RE_03	Stacked mixed use development - combining light industry with residential properties above	
Mixed Use Development	RE_04	Stacked mixed use development - combining medium industry with residential properties above	
Mixed Use Development	RE_05	Adjacent mixed use development - combining light industry with residential properties alongside	X
Mixed Use Development	RE_06	Adjacent mixed use development - combining medium industry with residential properties alongside	X
Mixed Use Development	RE_07	Mixed use development - combining retailing (land uses A1 to A5) with residential properties adjacent or above	X

- NB: while not considered as an exclusive option in its own right, the opportunity to reclaim an area of unusable water from the commercial port water area may be considered as part of residential developments, thus expanding the potential footprint of the site.

Residential Shortlist Detail

Three residential options are proposed to be shortlisted, ranging from whole-site to partial site mixed use developments



Residential developments can be scaled to fit the site availability, and scoped to fit the proposed target demographic. In general, the waterside location close to the historic marina lends itself to high quality housing, which is also in line with the Thanet Plan to deliver executive homes as part of its property development plan over the coming years.

Residential developments can be both complemented and hindered by mixed use schemes, for example: co-locating with light industries, workshop spaces, retailing and food and beverage outlets deliver employment for new residents as well as services to others. Heavy industries, as is a challenge if co-locating with traditional maritime activities, are likely to detract from values due to their round-the-clock operational schedules, noisy and potentially dusty/polluting environments.


While options in the residential sector are largely binary - i.e. build or don't build, and if so, in high or low density structures - three options have been proposed for further development. One is a full-site development which requires the full closure of port activities and enables only limited co-location of retail / office space. The second is a mixed use development, incorporating industrial units (light-medium + workshop spaces) with residential in a high density format. The third combines elements of a retail park which is not integrated directly with residential properties.

Sub Area	Option ID	Option Action	Rationale	Considerations & Next Steps
Residential Only	RE_02	Large scale flats/apartments development - in line with developments at Portsmouth / Eastbourne	Higher density housing is likely to be more affordable than lower density options, and therefore adds to the local housing stock. More affordable architecture is likely to visually impact more on the surrounding area.	Increasing density of housing to 80 units / hectare results in 600 new homes being delivered on the entire site. Volumes are in line with Thanet Plan but specific demand for this type of housing needs to be assessed by a property
Mixed Use Development	RE_05 & 06	Adjacent mixed use development - combining light/medium industry with residential properties alongside	Combining housing with light industrial uses such as workshop and office space delivers against both housing and employment objectives, and can add to the sense of community in the new development. Adjacent developments limits the efficiency of the plot footprint but allows for greater degrees of separation between the two, and potentially to use light industry as a buffer between residential development(s) and heavier industry at the Port	Adjacent developments enable segregation of residential from industry, and for buffer zones to be created, but are less efficient in terms of footprint utilisation. Medium industrial uses would benefit further from the segregation offered by adjacent
Mixed Use Development	RE_07	Mixed use development - combining retailing (land uses A1 to A5) with residential properties adjacent or above	Switching industrial uses with Part A land use offers, including retailing, cafes and small offices, would likely add to the ambience and attractiveness of the area subject to sufficient demand from retailers - unsold retail space is often converted to poor quality residential after a period of vacancy which should be avoided in the design/feasibility stage if possible.	Mixed use Part A land uses and residential land is likely to be popular but requires interested retailers to avoid vacant space negatively impacting the development

Section 6 - Leisure Development Assessment

Leisure Opportunities Areas of Interest

A total of 7 sub-areas fall within the banner of Leisure developments for consideration: all sub areas aside from a large scale tourist attraction complement mixed use development.

	Area	Sub Area	Objectives
 Leisure	Educational Facilities	Technology Campus	Develop specialist educational facilities for marine services
	Holiday Resort	Center Parcs	Develop a high quality holiday resort attracting tourists to the region
	Filming	Film Studios	Dedicated spaces for the creative industries including marine access
	Themed Tourist Attraction(s)	Aquarium / Theme Park etc.	Attract tourism to the region through the development of themed entertainment / educational offering
	Marina Development	Yachting & Marina Developments	Improve standards and access to the marina and increase level of activity (i.e. racing, triathlon, open water swimming etc.)
	Hotels	Hotel & Conference Facilities	Create conducive environment to attract tourist and business users to Ramsgate
	Food & Beverage	Food & Beverage Outlets	Create high quality opportunities and atmosphere for food and beverage outlets to thrive

Leisure - Educational Facilities

Development of educational facilities may be structured commercially or publicly, financial case is likely to be weaker than other commercial opportunities but the long run economic return is likely to be high



Outline

- Incorporating education facilities with Ramsgate can attract younger generation as well as offer skills training that may be applicable in the future to those switching career, voluntary, or involuntary. Increasing levels of automation require significant amounts of retraining in 'new' maritime practices.
- Maritime specialisms through a specialist Marine Academy or Marine Conservation Facility can continue Ramsgate's heritage and capitalise on the unique geographical location of the Port.

Similar Developments

- University of Kent – Canterbury/Medway/Tonbridge; Margate Adult Education Centre; Canterbury Christ Church University; Southampton Solent University.

Potential sites / land availability

- Not location sensitive, can be located to best fit with other developments or used as a buffer between industry and leisure / residential land uses.

Relevant statistics

- Open source research | BIS Research | ONS | Department for Work and Pensions

5 cases drivers

- Strategic
 - *Direct fit with education strategies, including adult education, bringing directly relevant skills to the area further cementing Ramsgate as a maritime centre.*
- Economic
 - *Social benefit is derived from a higher skilled workforce with direct access to jobs in the Port upon qualification a further benefit. New training and skillsets are expected to encourage entrepreneurship in industries adjacent to the maritime industry.*

Commercial

- *Requires the establishment of partnerships with public or private sector educational institutions.*

Financial

- *Unlikely to deliver major short term financial benefit to the Council, benefits are more keenly felt in the wider economic sphere.*

Management

- *Requirements are dependent on commercial structure established; ranging from landlord-tenant relationship for private providers to delivery responsibility with public educational facilities.*

Commercial structure(s)

- Vary from simple lease of land to private providers, to direct delivery.

Sensitivities

- Sensitive to industry developments such as automation and implementation of blockchain among other technological innovations driving (re)training requirements.

Dependencies

- Population demographics and trends, and resulting outturn demand for education.

Next steps

- Establish contact with Marine Conservation Society and/or other recognised leaders to explore possibilities .
- Engage with Discovery Park to understand relevant opportunities.
- Build partnerships with established education centres and universities to understand the role which can be played by a new facility in the Port in vocational courses.

Leisure - Holiday Resort



Outline

- Developing resort-style accommodation and attractions on the port site is targeted at driving up visitor numbers to the town and region as a whole. The UK's trends towards domestic holidays has driven the value of the camping and campsite industry to revenue figures in excess of £5bn in 2019, with 2,875 businesses operating and annual growth of 6.9% per annum between 2014 and 2019.

Similar Developments

- Various branded coastal camping / outdoor-style holiday resorts. Center Parcs locations have differentiating factors of inland locations but represent direct competition to Ramsgate developments for domestic holidaymakers.

Potential sites / land availability

- Resorts vary in size and scope but would require the redevelopment of the entire existing commercial port site. Comparators at Perranporth are 550,000sqm, Pontins Camber sands is 72,000sqm, Center Parcs closer to 1,000,000 sqm ('dome' central facility is c.35,000sqm).

Relevant statistics

- Tourist volumes & spend per head / night | Thanet Destination Management Plan.

5 cases drivers

- Strategic
 - *The Thanet Destination Management Plan sets an objective 'to encourage the development of more things for people to see and do, and places to stay'. A development of this style would therefore be strategically aligned to this objective and would bring employment in the leisure sector to the town, albeit at the expense of industrial land and employment opportunities.*
- Economic
 - *Direct benefits would be realised through land sale / long-lease. Indirect benefits*

would be attracted through employment opportunities, and local tourist spending.

- Commercial
 - *There are numerous operators of holiday parks and resort-style facilities who could be engaged to deliver a scheme such as this. Many are owned by large institutional investors, these include: Bridge Leisure, Park Leisure, Away Resorts, and Center Parcs.*
- Financial
 - *High margin industries such as this (net margins for the hotel and tourism industry are estimated between 12-16%), can reasonably be expected to deliver strong financial returns for the Council in terms of land lease / sale payments. Wider spread of tourism spending also brings indirect benefits.*
- Management
 - *Likely to result in typical landlord - tenant arrangement between council and private sector.*

Commercial structure(s)

- A conventional long term land lease is anticipated.

Sensitivities

- Developments may detract from the natural landscape. Traffic is also expected to be highly seasonal, impacting local road and transport networks at key months and resulting in more seasonal-type employment opportunities than stable jobs.

Dependencies

- Road and transport network developments may be required. Detailed planning guidelines would also be required.

Next steps

- Open discussions with large stakeholders and/or investment community in parallel with further transport and planning investigatory work.

Leisure - Filming

Ramsgate has been utilised as a filming location in the past, which can be leveraged to create a long term commercial opportunity. Likely to bring ancillary industries such as stage design and prop production



Outline

- The Port footprint offers sufficient scale to develop a one-stop shop for film production through the development of space(s) dedicated to the film and associated creative industries - prop design, film editing / processing etc.
- The Port has recently worked with the film industry, building relationships which can be leveraged to better understand the requirements of such developments.

Similar Developments

- Shepperton, Aborfield, Black Hangar, Pinewood and Longford Studios are located to the South/West of London. Warner Brothers are located to the North. No known major film studios are currently located in Kent itself.

Potential sites / land availability

- Large commercial stages are in the region of 1,500sqm, meaning a facility could be co-located on the Port footprint alongside other industrial or residential developments.

Relevant statistics

- Open source research

5 cases drivers

- Strategic
 - *Likely to bring significant employment to the region through the studios themselves as well as agglomeration effect bringing ancillary industries such as stage design and production.*
- Economic
 - *Social benefits are derived from employment as well as shifting demographic towards a younger, working-age population with disposable income to spend in the local economy.*
- Commercial

- *There are a limited number of film studios to market the space to; however, there is a strong central body, the British Film Commission, who may be utilised to act as market-makers.*

Financial

- *Film industry may value the unique location opportunity, and therefore the site may command a premium; however, generic studio space is likely to pay premiums for proximity to major cities and transport links.*

Management

- *Likely to result in typical landlord - tenant arrangement between council and private sector.*

Commercial structure(s)

- Relatively low cost development with the majority of spend undertaken by private sector.

Sensitivities

- May be incompatible with mixed use industrial site. Sensitive to demographics and accessibility to creative talent pool.
- In line with the international nature of the industry, film studio locations are generally located around major cities and/or transport hubs, which Ramsgate may not be able to compete with.

Dependencies

- Demographics and talent availability: could be mitigated through partnership with local universities' creative departments.

Next steps

- Locate the limited number of market participants to target. Note that all of which may require incentives to shift operations from existing sites and proximity to talent in major urban centres. Linking local universities' creative departments to the project may aid this option.

Leisure - Themed Tourist Attractions

A significant tourism boost can be derived from the development of unique themed attractions on the Port footprint. Likely to require a significant proportion of the site and lead to road / transport network capacity issues



Outline

- Aside from the Marina as a local heritage site, Ramsgate lacks unique selling points to attract large numbers of tourists to the town. An opportunity which may be explored is developing themed tourist attractions such as a theme park, aquarium, or watersports centre on the land currently occupied by the commercial port to deliver this tourism boost and an area of differentiation from other seaside resorts.

Similar Developments

- Dreamland (Margate), Sea World (Brighton), LegoLand (Windsor), Chessington World of Adventures (Chessington), Thorpe Park (Staines).

Potential sites / land availability

- Dreamland, Margate is a relatively minor theme park and is situated on 30,000sqm of land excluding parking, requiring the majority of the current Port footprint to deliver. Aquariums may be considerably more compact and are suitable for co-location with other land uses.

Relevant statistics

- ONS Tourism data | Economic Impact of Tourism Thanet 2017 report

5 cases drivers

- Strategic
 - *Themed attractions are likely to attract large visitor numbers from the surrounding region and beyond. Likely to also bring high levels of low skilled employment and ancillary industries such as ride maintenance as well as secondary tourist opportunities.*
- Economic
 - *Economic benefits are derived through tourist spending and attracting demand for secondary industries such as hotels, retailing, and food and beverage outlets.*

Commercial

- *There are a relatively small number of theme park operators to market the space to; however, the site has a unique setting and may be of interest to these parties.*

Financial

- *Derived from market rate for land, albeit developers may negotiate based on value added to the local community by the throughput attracted by its facility.*

Management

- *Typical landlord-tenant relationship between Council and private sector.*

Commercial structure(s)

- Operators would likely demand long leases to enable high capital costs for park development.

Sensitivities

- Sensitive to good transport links to major population centres, the local road network, and availability of parking spaces.

Dependencies

- Sufficient land availability, planning constraints, road and transport network capacity.

Next steps

- Theme Parks / Aquariums - open discussions with theme park operators such as Merlin Entertainment to assess site feasibility.
- Watersports / aquatics centre - investigate funding opportunities from British Athletics, National Lottery etc. May not deliver high commercial returns associated with other options.

Leisure - Yachting & Marina

Marina development is likely to have a low impact on other development options. Target audiences are likely to be larger vessels, bringing higher local spending



Outline

- Yachts are accommodated in the Royal Harbour which has been awarded 4 Golden Anchors (5 being the maximum) for its high quality facilities among other assessment criteria.
- Light-touch options are built around increasing standards and adapting the current berth mix with a view to accommodating larger vessels than is currently possible.
- More intrusive, but also more impactful options relate to the relocation of the fishing and renewables O&M fleets to an unused area of the commercial port, freeing up space in the East Marina for more, larger vessels and new facilities.

Competition

- There are a large number of sites across the south east competing for leisure vessel berthing, notable alternatives to Ramsgate are: Eastbourne Marina | Shamrock Quay (Southampton) | Brighton Marina | Cobbs Quay (Poole) | Newhaven Marina | Lympington Marina | Port Solent (Portsmouth) | Wellington Harbour (Dover)
- Demand is expected to be largely price-inelastic and more driven by ease of use, service availability, and access to popular sailing waters/landmarks

Potential sites / land availability

- The harbour currently consists of more than 600 berths across a range of sizes: there is scope to redesign and reconfigure the marina to align it with current demand, but not to extend it given structural constraints.

Relevant statistics

- ICOMIA leisure boat statistics | AIS data | British Marine

5 cases drivers

- Strategic
 - *Increasing the standards and scope of the marina to handle larger yachts is likely*

to shift the customer base towards higher value vessels with larger, more affluent passengers.

- Economic
 - *Value is derived from higher tourist spend, increased tourist dwell time, and requirements for more supporting industries associated with larger vessels.*
- Commercial
 - *Improvements may be funded by private sector, but may require ownership interests to transfer away from the Council. Financing would otherwise need to come from public funds which may be difficult to justify.*
- Financial
 - *Detailed business case appraisal required to balance costs of improvements with higher tariffs and / or demand.*
- Management
 - *Immaterial impact of development compared to the current situation.*

Commercial structure(s)

- Immaterial impact of development compared to the current situation.

Sensitivities

- Increased standards are likely to require price increases, potentially forcing local users out of the market.

Dependencies

- Yachting demand is anticipated to decrease in future years, with young people less likely to take up the hobby than previously.

Next steps

- Benchmark versus 5-anchor locations to understand requirements

Leisure - Fishing Fleet

Relocation of the fishing fleet to improved facilities at the port is unlikely to have a significant impact on its users, but enables development of new marina opportunities



Outline

- Yachts are accommodated in the Royal Harbour which has been awarded 4 Golden Anchors (5 being the maximum) for its high quality facilities among other assessment criteria
- There is currently a dredged approach channel with a minimum depth of 7.5m.
- There is an opportunity to improve standards, targeting a 5 anchors rating to bring it in line with the top marinas in the country as well as increasing the size of vessel it is able to accommodate.

Competition

- There are a large number of sites competing for leisure vessel berthing, notable alternatives to Ramsgate are: Eastbourne Marina | Shamrock Quay (Southampton) | Brighton Marina | Cobbs Quay (Poole) | Newhaven Marina | Lymington Marina | Port Solent (Portsmouth) | Wellington Harbour (Dover)
- Demand is expected to be largely price-inelastic and more driven by ease of use, service availability, and access to popular sailing waters/landmarks

Potential sites / land availability

- The harbour currently consists of more than 600 berths across a range of sizes: there is scope to redesign and reconfigure the marina to align it with current demand, but not to extend it given structural constraints.

Relevant statistics

- ICOMIA leisure boat statistics | Macroeconomic context

5 cases drivers

- Strategic
 - *Increasing the standards and scope of the marina to handle larger yachts is likely to shift the customer base towards higher value larger vessels with more affluent*

passengers.

- Economic
 - *Value is derived from higher tourist spend, increased tourist dwell time, and requirements for more supporting industries associated with larger vessels.*
- Commercial
 - *Improvements may be funded by private sector, but may require ownership interests to transfer away from the Council. Financing would otherwise need to come from public funds which may be difficult to justify.*
- Financial
 - *Detailed business case appraisal required to balance costs of improvements with higher tariffs and / or demand.*
- Management
 - *Immaterial impact of development compared to the current situation.*

Commercial structure(s)

- Immaterial impact of development compared to the current situation.

Sensitivities

- Increased standards are likely to require price increases, potentially forcing local users out of the market.

Dependencies

- Yachting demand is anticipated to decrease in future years, with young people less likely to take up the hobby than previously.

Next steps

- Benchmark versus 5-anchor locations to understand requirements

Leisure - Hotels

Hotels employ large amounts of low-skilled staff and can add to the attraction of the town in their own right when developed and marketed effectively



Outline

- There is an opportunity to develop hotel and conference facilities to provide further choice and capacity in the town for tourists and business users. This may be in the form of a new build development, or through the repurposing of the former Smack Boys House.
- Large chain hotels such as Radisson, Hilton, and Novotel are likely to encourage a more exclusive hotel / business environment and bring the added benefit of powerful marketing doubling with local efforts to attract guests / visitors. They are however, less likely to offer required flexibility in the development of exteriors sympathetic to the local environment.

Similar Developments

- Comfort Inn Ramsgate, Kent Innovation Centre, various boutique hotels

Potential sites / land availability

- May benefit from prime plot site with highly marketable sea views and/or heritage Smack Boys House building. Will also be adversely affected by nearby industry.

Relevant statistics

- Open source research | Economic Impact of Tourism Thanet 2017 report

5 cases drivers

- Strategic
 - *Aligned with council employment and tourism objectives, but fails to maintain local industrial opportunity.*
- Economic
 - *Benefits derived from direct job creation at the facilities as well as driving tourism sector to develop ancillary offerings.*

Commercial

A wide range of hotel brands exist which would bring the required marketing pull to the area.

Financial

- *High revenue businesses are likely to command high financial returns for the Council.*

Management

- *Minimal impact on council in the long run, post procurement exercise and planning guidance.*

Commercial structure(s)

- *Likely to be managed through procurement and planning procedures, followed by long term lease.*

Sensitivities

- Demand is sensitive to demand for UK holidays. Site specific sensitivities will be mainly focused on surrounding environment, presence of industry etc.

Dependencies

- Presence of positive ambience and tourist attractions

Next steps

- Assess current supply and demand dynamics from business and tourism trends in the region. Establish contact with hotel developers and local commercial property agents to understand market values and opportunities.
- Could utilise existing historic buildings (i.e. Smack Boys building) to maximise value derived from TDC assets



Outline

- While unlikely to present a positive case for investment as a standalone development, food beverage outlets are complementary industries to other retail, commercial, and residential developments.

Similar Developments

- Food and beverage outlets are abundant across the town - varying from high end bistros to fast food. There is a current trend towards 'street food' type outlets and communal food halls which may impact the footprint requirements as well as the commercial structures which are attractive to tenants.

Potential sites / land availability

- Likely to be accommodated within the footprint of other developments, whether industrial, commercial, retail or residential.

Relevant statistics

- Tourist and local spend per head | Economic Impact of Tourism Thanet 2017 report

5 cases drivers

- Strategic
 - *Strong strategic fit insomuch as f&b outlets create employment opportunities and complement the wider tourist and residential offering of the town*
- Economic
 - *Economic value is created through jobs and increased local spending, preventing leakage to non-Thanet economies*
- Commercial
 - *A very deep pool of food and beverage providers exists; however, the Council needs to be wary of difficult trading conditions and market participants entering in*

to CVAs which may create issues.

- Financial
 - *Combining food and beverage outlets with other land uses would be likely to deliver a highly efficient, complementary offering.*
- Management
 - *Options exist for the council to operate on a landlord-tenant basis, or to deliver this option through a third party company.*

Commercial structure(s)

- Leases with food and beverage tenants are likely to work on a short term basis, requiring either the Council to be highly active in its commercial involvement, or outsourced management.

Sensitivities

- Sensitive to local economic conditions, population density, and alignment of demographic with service offering.

Dependencies

- Dependent on other developments such as residential, tourist attractions, and commercial/industrial, or retailing.

Next steps

- Explore opportunities through specialist commercial property markets.

Leisure Options Long List

Summary of options long-list under consideration



Sub Area	Option ID	Option Action	Shortlist
Education	LE_ED_01	Develop technology campus as an extension of, or in partnership with Discovery Park or regional universities	X
Education	LE_ED_02	Develop marine campus as an extension of, or in partnership with Discovery Park or regional universities	X
Education	LE_ED_03	Develop marine conservation campus as an extension of, or in partnership with Discovery Park or regional universities	X
Marinas	LE_MA_01	Adapt marina berth mix to accommodate larger yachts	
Marinas	LE_MA_02	Develop joined up marketing plan with other nearby ports to capture coastal yacht cruising traffic	X
Marinas	LE_MA_03	Optimise marina tariffs to best-balance revenue with volumes	
Marinas	LE_MA_04	Develop a plan for the marina to achieve 5-Anchor status. Review and upgrade facilities where necessary. Development may be undertaken in conjunction with LE_MA_05.	X
Marinas	LE_MA_05	Relocate the fishing and renewables O&M fleets to an unused area of the commercial port, freeing up space in the East Marina for more, larger vessels and new facilities for both leisure and fishing fleets	X
Hotels & Accommodation	LE_HO_01	Develop hotel and conference facilities - new build development	
Hotels & Accommodation	LE_HO_02	Develop hotel and conference facilities - repurposing of Smack Boys House	X
Themed Tourist Attractions	LE_TH_01	Develop themed tourist attraction(s) such as theme park, aquarium, and/or aquatics & watersports centre	
Food & Beverage Outlets	LE_FB_01	Develop food and beverage offering	X
Commercial Filming	LE_FI_01	Develop space(s) dedicated to the film and associated creative industries - prop design, film editing / processing etc.	

Leisure Shortlist Detail

Eight specific options have been shortlisted for further assessment, however these cover a narrow scope of three discrete sub-areas: education, marina developments and tourism/visitor facility development



Leisure opportunities vary from major schemes requiring the entire site, such as the development of a theme park-style attraction, to light-touch improvements of the marina in order to attract a broader range of visitors to the region. Educational facilities are also grouped with leisure developments for the purposes of this study and are important to explore in more detail.

Six specific options are proposed for further analysis, three educational schemes, two marina developments, and food and beverage developments.

It should be noted that benefits are sometimes realised through less tangible metrics than more strict commercial opportunities which makes comparative assessment and decision justification when immediate revenues are foregone.

Sub Area	Option ID	Option Action	Rationale	Considerations & Next Steps
Education	LE_ED_01	Develop technology campus as an extension of, or in partnership with Discovery Park or regional universities	Vocational technology studying is increasingly popular and allows those with non-traditional academic backgrounds to develop high income careers. A local technology campus located in-town, or sister facility to Discovery Park which is actively seeking permissions to expand, would benefit local residents and attract new residents	Engage with Discovery Park to understand relevant opportunities - may combine with maritime heritage to deliver marine-technology courses
Education	LE_ED_02	Develop marine campus as an extension of, or in partnership with Discovery Park or regional universities	A marine academy would capitalise on Ramsgate's maritime heritage and existing infrastructure / location of marine-related businesses. Increasing levels of automation require significant amounts of retraining in 'new' maritime practices	Marine sector is undergoing significant changes as technology plays an increasingly important role. This requires retraining of current employees, and development of a new cohort of trainees.
Education	LE_ED_03	Develop marine conservation campus as an extension of, or in partnership with Discovery Park or regional universities	Marine conservation is a key issue facing the global population throughout the lifetime of the current generation. It has been given significant airtime in popular media coverage and may benefit from a specific study location	Link up with Marine Conservation Society and/or other recognised leaders to explore possibilities
Marinas	LE_MA_02	Develop joined up marketing plan with other nearby ports to capture coastal yacht cruising traffic	Clear wayfinding and route-planning, combined with joined-up/simplified tariffs and booking systems may encourage increased transient visitor revenues (and indirect benefits through local spending in local economy)	Hostile/competitive environment may require diplomacy to break down barriers throughout cooperation negotiations
Marinas	LE_MA_04	Develop a plan for the marina to achieve 5-Anchor status (review and upgrade facilities where necessary)	Recognition of best-in-class facilities and processes, and customer service may open new markets for yacht traffic. These customers would likely also bring higher spend per head to the local economy, and large crews	Sea-going motor yacht imports heavily outstrip those of sea-going sailboats in value terms; however, rising fuel prices should also be considered

Leisure Shortlist Detail

Eight specific options have been shortlisted for further assessment, however these cover a narrow scope of three discrete sub-areas: education, marina developments and tourism/visitor facility development



Sub Area	Option ID	Option Action	Rationale	Considerations & Next Steps
Marinas	LE_MA_05	Relocate the fishing and renewables O&M fleets to an unused area of the commercial port, freeing up space in the East Marina for more, larger vessels and new facilities	Renewables O&M fleets are optimally located close to the respective office locations, this option delivers that, along with new space in the marina for leisure vessels without impacting the availability of space for fishing fleets. Space in the commercial port is also more readily available, enabling the development of facilities for the fishing fleet close to their new on-water location	Dependent on the uptake of other options relating to conventional shipping at the Port. Has CAPEX associated, and therefore requires business case appraisal.
Hotels & Accommodation	LE_HO_02	Develop hotel and conference facilities - repurposing of Smack Boys House	Provide regional organisations and business with area for conferencing and accommodation. Doubles as tourist accommodation. Brings high volumes of jobs and visitors to the area - adding to the local economy	Assess current supply and demand dynamics from business and tourism trends in the region. Establish contact with hotel developers and local commercial property agents to understand market values and opportunities. Could utilise existing buildings (i.e. Smack Boys building) to maximise value derived from TDC assets
Food & Beverage Outlets	LE_FB_01	Develop food and beverage offering	Dedicated sites for food and beverage outlets would complement housing and industrial developments, and may attract tourism from surrounding area in their own right.	Existing food and beverage offering exists in the vicinity of the Port, would only require expansion in line with mixed use development including significant residential and/or industrial development. Caution should be applied to local F&B retailers who will lose market share from an already precarious industry

Section 7 - Maritime Village Development Assessment

Maritime Village - Concept

Ramsgate has the option to combine residential, commercial, industry



The concept of a maritime village combines elements of all the sectors looked at earlier in the report in a cohesive manner. The specific contents of a maritime village can incorporate varying proportions of marina / industry / commercial functions, depending on the specific context in which it is to operate. Such mixed-use developments enable a broad range of benefits to be realised while reducing excess or redundant space. They do however require careful consideration throughout the planning and design stages to ensure all disbenefits of co-locating residential, leisure and commercial uses are mitigated as effectively as possible.

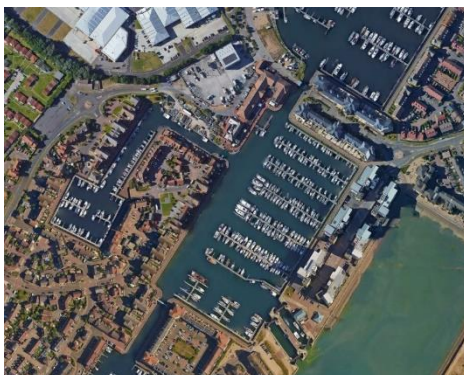
With specific regard to Ramsgate; this potentially involves marrying heavy industrial uses of the commercial port with residential and leisure facilities in close proximity. There are two specific, contractual obligations which restrict future developments, or at the very least add significant financial and reputational costs to the project in the event that the Council attempts to cancel the agreements:

1. Long term lease obligation to Brett Aggregates; Heavy industry detracts from the attractiveness of the site for non-industrial usage. Removing the liabilities of the Council as landlord could be costly and would impact its reputation for doing business with local partners.
2. Long term lease obligation to Renewables Operators & Dry Boat Yard. Both are occupying the most optimal location for real estate to capitalise on the aesthetics and community of the marina.

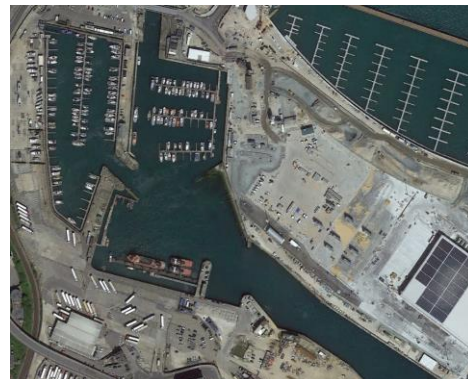
A benchmarking study has been undertaken to examine how this concept has been delivered at specific sites across the southern part of the UK. This covers four primary examples (as per the sites below), and seven secondary comparators. The aim of this process is to understand exactly what has been delivered, where, and under which social and economic contexts. Identified best practices are ultimately intended to feed in to the masterplanning phase of the project where applicable.

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Eastbourne: Marina/Residential



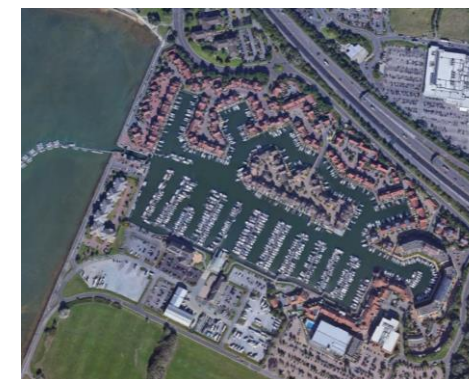
Dover: RoRo/Marina/Industry/Residential



Newhaven: RoRo/Marina/Industry



Portsmouth: Marina/Residential



Primary Mixed Use Examples

Mixed use developments have been delivered successfully across the UK: all vary significantly in scope and scale in accordance with unique local circumstances



Site Name	Size / Scale	Maritime Context	Population	GVA (£m)	GVA per capita (£)	CAGR GVA %	Commercial / Residential Mix	Highlights / USPs	Contextual Comparison to Ramsgate
Ramsgate (Thanet)	45ha	Industrial and Marina Historically important maritime link between UK and Continental Europe.	141,083	2,353	16,648	1.8%	Commercial port focusing on ro-ro traffic adjacent to a high quality, well-utilised marina. No further industry or residential on-site currently.	Short distance to Continental Europe. Recent history of active services.	Declining maritime throughput and presence, though may be more strategically important post-Brexit.
Eastbourne	46ha	Residential / Marina only No industrial port uses. Private harbour facilities.	103,127	2,126	20,591	1.1%	20 retail units ; 400 flats & holiday apartments ; Several hotels. Adjacent entertainment complex + retail and food and beverage offerings.	Northern Europe's largest composite marina: High end yacht club; 1,000 person conference facility; Residential properties located on the water's edge.	Not an active commercial port facility, less significant commercial maritime heritage. Similar scale of facility. Higher yielding socioeconomic backdrop.
Newhaven (Lewes)	90ha	Industrial and Marina Single RoRo link to France. Private and commercial marina with industrial aggregate distribution.	~12,500 (2011) 102,744 (Lewes District)	2,085	20,390	3.2%	Medium size RoRo terminal and marina with associated sales, engineering and shipwrights development. Industrial (mostly construction uses) with direct access to the rail network. Relatively small storage area indicates mainly transit focussed.	Denton Island and Marina.	Ro-ro service is reportedly highly subsidised by Dieppe authorities. Significantly larger footprint than Ramsgate. Smaller, higher yielding local population.
Dover	55ha West 52ha East	Industrial and Marina Commercial port with marina and undergoing expansion project.	116,969	2,258	19,499	1.6%	Industry & RoRo focussed port with development plans to include more diverse commercial activities.	Busiest international RoRo port in Europe based on volume.	DWDR Project to revive and encourage additional activity which may compete directly with Ramsgate. Significantly larger footprint, and commercial operations.
Portsmouth	330ha	Industrial, Residential and Marina Mixed use port with recent (past 25 years) diversification into retail, leisure and residential uses.	214,027	5,352	25,236	1.9%	500+ luxury portside apartments, large commercial dockyard, Private marina for small boats to 1000+ person cruise liners.	Port development includes retail outlet complex Gunwharf Quays, tourist attraction Spinnaker Tower, historic dockyard with several museums. Naval Base nearby.	Major city with different dynamics to Ramsgate. Very large, high end residential / marina area near dry dock demonstrates co-locating maritime industrial sites with residential projects can be successful.

Secondary Comparators

Coastal hubs with less similar characteristics to the Ramsgate Port area



Site Name	Size / Scale	Maritime Context	Population	Commercial / Residential Mix	Highlights / USPs	Contextual Comparison to Ramsgate
Southampton	713ha	Industrial / Marina / Residential Very old mixed use Port seen continued focus on industrial and commercial marine uses	251,368	Approximately 80:20 land split between industrial and other uses respectively. Large quantity of the industrial uses is dedicated to cargo shipping. Several private marina areas with retail and leisure units.	The industrial cargo area has a direct connection to existing rail infrastructure for easy distribution. Several berths are set up for regular ferry and cruise uses.	Major coastal city with university and high levels of commerce. Very busy industrial port & marina
Harwich and Felixstowe	602ha	Industrial only Mostly heavy industrial and cargo port with numerous side berths owing to a long coastal perimeter. Harwich International Port for mostly Cargo and HGV transit.	~40,000	A small marina at Shotley and Town centre uses at Harwich compliment the almost 100% industrial / commercial uses for the rest of the port over the discontinuous coastline	Harwich International Port connections to the Netherlands	Extremely large, well utilised industrial facility compared to Ramsgate. Considered a ro-ro hub serving links between the UK & Europe.
Brighton and Hove	169ha Industrial 49ha Marina 29ha sea front	Industrial / Marina / Residential Large waterfront city. Large marina to the east, Large industrial port to the west using the River Adur	287,664	Marina has associated Leisure, retail, food and beverage hub separate from the main city centre. Industrial uses are variable, from renewable energy, construction, freight and storage.	Brighton Marina, Hove Lagoon	High degree of segregation between industrial and leisure uses. Major tourist destination city.
Littlehampton	44ha	Marina and Industrial Using both the sea frontage and both sides of the River Arun this small seaside resort now hosts several small marinas and an industrial complex along the river.	~30,000	Mixed use, diversified from seaside resort into some industrial and commercial uses	Harbour Park Amusements	Significantly smaller local populations reliant on local industry for employment opportunities.
Folkestone	25ha	Marina only Seaside Town with very small marina	~45,000	This seaside town has industry focussed on tourism with 3 hotels, many restaurants (15+) and a small marina	Grand Burstin Hotel	
Great Yarmouth	183ha	Industrial only Expansions constrained port along river central to the town	~44,000	100% industrial uses along the River Yare. Retail and leisure uses are more closely associated with the town centre and north-eastern beachfront than with the harbour / waterfront. Separation of around 500m	Reclaimed land with large vacant space for development	Large scale industrial port well established in the UK maritime infrastructure markets.
Tilbury	778ha	Industrial only Industry dominated port	~360,000	Development shows maximum density industrial port uses. It is London's Gateway port	Immediately adjacent to the M25 links port to London & wider UK..	Very large industrial port facilities serving the South East of England.

Ramsgate Maritime Village - Opportunities In Context

- Emerging analysis suggests that the development of a mixed use facility (i.e. a development incorporating elements of commercial port usage, other industrial uses, leisure facilities and residential dwellings) can be delivered successfully in the UK, and may represent the most efficient use of the current Ramsgate Commercial Port footprint.
- While traditional appraisal techniques are able to quantify the net benefits of specific developments such as those set out in the Commercial, Leisure, and Residential sections of this report on a standalone basis; the impact of the combination in which they are delivered is more difficult to quantify.
- There are no direct benchmarks which can be drawn on to provide a blueprint for the site; however, the following development priorities have been distilled from the analytical processes undertaken in the development of this report:

Priority 1 - retain commercial / industrial port uses on a streamlined basis with a view to attracting a regular ro-ro service

- *Commercial port facilities are relatively scarce in the UK. With ongoing uncertainty following Brexit, opportunities may arise for the recommencement of commercial ro-ro services connecting the UK with Continental Europe.*
- *Infrastructure is already in place to manage ro-ro traffic with little resale value.*
- *Required footprint can be minimised if effective operational measures are implemented, enabling sufficient land. Should management be unable to attract cargoes, and demand for space exceeds supply, land may be repurposed later in the development process. This should be included as a contingency in the design phase.*
- *Impact of ro-ro cargoes on the surrounding environment is comparably small relative to other cargo types.*

Priority 2 - leverage land closest to the picturesque marina site for residential and leisure purposes


- *All comparators assessed in the benchmarking study had a common theme: residential dwellings were located close to marinas and distanced from commercial shipping activities.*
- *This is likely to increase the value which can be derived for the Council, and ensure high marketability and uptake.*
- *There may be relocation costs associated with the renewables O&M sites which currently occupy an area close to the water.*
- *A robust market assessment by property specialists should be undertaken to confirm this hypothesis.*

Priority 3 - retain employment opportunities on-site with a particular emphasis on lower skilled jobs

- *Driving employment in the region is a key objective of the Council, underpinned by policies to actively expand employment land areas.*
- *Development of industrial units close to the port may stimulate (and/or be stimulated by) additional commercial shipping operations at the port. This impact is likely to be circular, driving economies of scale and / or scope to the area.*


Residential Areas of Interest

A total of 7 sub-areas fall within the banner of Residential developments for consideration: all sub areas aside from a large scale housing development complement mixed use development.

	Area	Sub Area	Objectives
 Residential	Pure Residential	Large scale, predominantly detached, housing development - some of which to include vessel berths - in line with Eastbourne Sovereign Harbour	Develop a new, large scale - low density housing project including addition of executive homes
	Pure Residential	Large scale flats/apartments development - in line with developments at Portsmouth / Eastbourne	Develop a new, large scale - high density housing project including addition of executive homes
	Mixed Use	Stacked mixed use development - combining light industry with residential properties above	Develop both residential and light industrial opportunities on a highly efficient land use basis
	Mixed Use	Stacked mixed use development - combining medium industry with residential properties above	Develop both residential and medium industrial opportunities on a highly efficient land use basis
	Mixed Use	Adjacent mixed use development - combining light industry with residential properties alongside	Develop both residential and light industrial opportunities on a less efficient land use basis
	Mixed Use	Adjacent mixed use development - combining medium industry with residential properties alongside	Develop both residential and medium industrial opportunities on a less efficient land use basis
	Mixed Use	Mixed use development - combining retailing with residential properties alongside	Develop both residential and retailing opportunities on a highly efficient land use basis by utilising ground floor plots for retail

Leisure Opportunities Areas of Interest

A total of 7 sub-areas fall within the banner of Lesiure developments for consideration: all sub areas aside from a large scale tourist attraction complement mixed use development.

	Area	Sub Area	Objectives
 Leisure	Educational Facilities	Technology Campus	Develop specialist educational facilities for marine services
	Holiday Resort	Center Parcs	Develop a high quality holiday resort attracting tourists to the region
	Filming	Film Studios	Dedicated spaces for the creative industries including marine access
	Themed Tourist Attraction(s)	Aquarium / Theme Park etc.	Attract tourism to the region through the development of themed entertainment / educational offering
	Marina Development	Yachting & Marina Developments	Improve standards and access to the marina and increase level of activity (i.e. racing, triathlon, open water swimming etc.)
	Hotels	Hotel & Conference Facilities	Create conducive environment to attract tourist and business users to Ramsgate
	Food & Beverage	Food & Beverage Outlets	Create high quality opportunities and atmosphere for food and beverage outlets to thrive

Section 8 - Conclusions

Study Conclusion

This study has considered a wide range of opportunity areas and operational models to identify the most efficient use of the Ramsgate Commercial Port site: a mixed use development has emerged as a promising solution.

Review of Current Situation

- The Port of Ramsgate is strategically important to the region and the country as whole. It encompasses two zones with unique characteristics and requirements: the Commercial Port and the Royal Harbour. In total it occupies a footprint of 35.6 hectares of prime land close to the town centre.
- Following the end of the duty-free era in 1998, a new business model was required for services between Ramsgate and continental Europe. A freight focussed service operated between Ramsgate and Ostend from November 1998 to April 2013. However, no scheduled services have operated since 2013. This has left a substantial amount of underutilised land and a material gap in funding. A key financial burden is the depreciation of assets which, while their value can be leveraged in-situ, have limited sell on value.
- There are limited organic short term prospects for commercial success, there is therefore a strong case for intervention to repurpose some or all of the land it occupies in order to unlock a string of social and economic benefits.

Land Use Options

- To establish how the Council can best utilise the site, a detailed review of the following sectors has been undertaken in line with current policy frameworks:
 - *Commercial: including all commercial shipping cargoes, industrial, retailing and commercial opportunities.*
 - *Residential: ranging from a site-wide residential development, to a localised marina-adjacent development. Various densities have been tested in line with policy parameters.*
 - *Leisure: options to develop opportunities at the marina to development of a holiday/activity resort centre and themed tourist attractions have been explored.*

Recommended Land Usage

- Analysis indicates that developing a mixed use site which retains the potential for ro-ro ferry services while adding light-medium industrial zones, a larger renewables O&M facility with better-located berths, an expanded marina offering, and a marina-adjacent residential development would maximise the value which can be derived from the current Commercial Port site.
- This delivers against three major council objectives which states that the development must::
 - *Deliver commercial successes from the Port site, not necessarily from conventional maritime uses.*
 - *Deploy limited capital resources as a catalyst for private sector investment in the Port, town, and wider region.*
 - *Be deliverable without negatively impacting the local environment and without detrimental impact to the high street funding work.*

Evidence Base Developed

- Market conditions and medium-term outlooks for all sub-areas set out in this report
- Benchmarks of mixed use port developments
- Review of current Thanet District Council policies and alignment with benefits of proposed development options

Primary Zone Target Sectors

The site is large enough to be effectively broken down in to nine individual zones, although a site plan including the proposed usage option conclusions from this report, should be confirmed through a further masterplanning process.

Zone	Outline Size Requirement (sqm)	Preferable Zone Location	Primary Use	Target Sectors	Target Sector Rationale
1	c.50,000sqm	Western edge of commercial port zone	Industrial	Light-Medium Manufacturing - where possible complementary to port uses	Growing demand for these sectors, complement/are complemented by the port use and therefore allow intrinsic value of the land to be realised
2	c.30,000sqm	Adjacent to ro-ro berth	Port	RoRo Traffic	Increasingly scarce facilities with high intrinsic value / strategic importance to the Council and UK economy as a whole. Minimal CAPEX & footprint requirement with RoRo facilities, requires structural change
3	c.20,000sqm	Adjacent to road XX	Renewables O&M	London Array O&M Stakeholders	Unlikely to increase the scope of Ramsgate's reach in to new build O&M but can build on successes & client base. Opportunities to relocate vessels to nearby location with deep water future proofs operations to manage larger vessel operations
4	c.30,000sqm Potential for land reclamation	Plot linking commercial port with marina	Residential	New build housing developers	Marina-adjacent residential developments are likely to be more attractive to residents and enables the highest possible degree of separation from industrial uses while capitalising on privileged geography. 4a development allows expansion in to waters which are unusable for commercial shipping due to tidal movements.
5	Existing Smack Boys Building		Hotel / Conference Facility	Hotel groups & boutique operators	Historic building with scope for redevelopment in to value-add offering such as hotel / conference facilities
6	Existing Arch Retail Units		Military Road Arches	Incumbent tenants	Recently developed, successful, provides good link with high street
7	c.2,000 sqm	Unchanged - unless significantly expanded in to Industrial Zone (1)	Victorian Slipways	Vessel repair & maintenance	EAPL / GPS Marine are incumbent operators with remit to maintain slipways and offer vessel repair and maintenance services. Opportunity to relocate to commercial port land and expand opportunities with modern infrastructure
8	c.20,000sqm	East Marina	East Marina	Large vessel owners / operators / tour groups	Prime harbour space currently utilised by low yield fishing fleet and renewables O&M vessels could be repurposed to attract larger leisure vessels (excluding vessels >60m LOA and 2.5m draft) and 5 Anchor status, subject to the improvement of facilities at the port to provide year round safe berthing.
9	c.15,000sqm	Unchanged	Dry Bulk Facility	Incumbent tenants	Brett Aggregates site is assumed to remain in situ and unchanged for the duration of its lease, potentially running to 2054. This both enhances the Council's reputation in terms of doing business and removes the capital cost of compensating the tenant. Negative environmental impacts of the aggregates industry can be mitigated.

Zonal Development Appraisal

Successful delivery of a mixed use development delivers against the appraisal objectives of the Council, retaining employment opportunities while layering further economic and financial benefits on top of today's position

5-Case Drivers

Area	Development	Strategic Fit	Economic Case	Commercial Case	Financial Case	Management Case
Zone 1	Mixed use light-medium industrial development targeting growth sectors as well as potential for an expanded boat yard	Retains employment land for its primary purpose	Drives job development, focus on low-skilled employment	Wide range of target sectors & businesses of varying scale	Long run stable returns from land lease agreements	Likely operated in long run through third party lease business
Zone 2	RoRo shipping terminal based on a condensed footprint and single berth	Retains primary port use & capitalises on existing assets	Drives job development, focus on low-skilled employment	Limited number of ferry operators to negotiate with	Operators may require short term incentives to switch operations	May require commercial shipping specialist(s) to manage increased volumes
Zone 3	Relocated renewables O&M facility - enabling service expansion offering	Retains local employment & stable revenue stream	Retains employment opportunities and potential to develop further	Incumbent tenants, minimal commercial impact of relocation	Limited scope to attract additional O&M business, build on existing	Minimal change will have minimal management impact
Zone 4	Residential zone based on land currently occupied by renewables O&M facilities, with an optional extension through reclamation.	Delivers housing stock in line with Local Plan objectives	Delivers necessary housing supply & diversifies offering	Large number of developers creates competitive market conditions	Long lease or sale of land to developers will create capital for the Council to reinvest	Long term - minimal impact. Short term - requires procurement process and planning workstreams
Zone 5	Conversion of former Smack Boys building in to events, hotel, and creative space(s)	Utilises historic asset to provide revenue stream	Boosts tourism industry & provides point of differentiation	Wide range of procurement options available	Provides direct revenue stream to Council, likely through medium term lease	Requires procurement process and planning workstreams
Zone 6	Retention of arches tenants	Status quo delivers wide range of benefits from employment to service provision and should be retained throughout development				
Zone 7	Victorian slipways may be replaced and/or complemented by additional vessel repair and maintenance facilities in zone 1	Develops revenue streams from modern, fit for purpose assets	Expanded offering will boost employment and complement primary port/marina usage	Limited, but likely sufficient volume of operators to value	Likely high CAPEX option, requires lease to private operator	Requires negotiation with incumbent tenants and procurement exercise
Zone 8	Fishing and renewables O&M vessels relocated to commercial port, freeing space for new berths targeting 5 anchor status	Incremental revenue streams and potential for improvement to fishing fleet facilities	Increases opportunity with O&M employment & tourism through expanded harbour	-	Likely to drive incremental marina revenue and create O&M opportunities	Requires negotiation with incumbent tenants and management of physical works
Zone 9	Brett Aggregates site remains in situ and unchanged for the duration of its lease	Tenant should remain unaffected throughout developments, providing a positive reputational impact of doing business with the Council, retaining jobs, assists the local construction industry, and removes the need to compensate the incumbent operator				

Zonal Development Benefits Summary

Recap of target sectors and benefits derived from each zone

Zone 1 - Industrial/Commercial Developments

Creating an industrial part of the Ramsgate site would create jobs and opportunities in the area. The options selected have the possibility to bring a diverse range of employment opportunities which can expand to new areas benefitting wider area, both economically and socially.

Zone 2 - Commercial Port Developments

The prioritisation of RoRo as the sole commercial port target user requires the least CAPEX and builds on an already established business. Other cargo types would be reliant on opportunistic trade volumes and require CAPEX for necessary port infrastructure including; alongside quay, mobile cranes, and storage/warehousing. The latter requires further space on the site which will necessarily detract from other suggested options

Primary port operations are to increase through added services and investment, this will have some consequence for alternative facilities but will not overwhelm planned residential and industrial activity.

Zone 3 - Renewables O&M / Education Facility Developments

The established renewable O&M section of the port is a consistent and low maintenance source of revenue for the port. While currently operating under a fixed sum agreement, the sector is evolving, thus offering the potential for Thanet District Council work closely with its tenants to capitalise on developments and deliver further value added services to its incumbent customers.

It is anticipated that any educational facilities would operate under similar conditions, in a nearby area of the site, potentially co-locating under circumstances which necessitate the relocation of existing Renewables O&M facilities.

Zone 4 – Residential, Retail & Food & Beverage Developments

Residential developments satisfies the local housing market by increasing supply and contributing to a healthier supply demand balance. As per the councils plans to build 500 homes per year, it is valuable to contribute space and living area on the Ramsgate port site. Creating executive homes can also bring new demand for higher market retailing and marine activities, thus providing stimulus to the local economy.

Zones 5-9 - Marina Developments

The options available for the various zones will provide better utilisation to the port site as well as provide diversification of offerings at Ramsgate that can increase local economic and social benefits.

Section 9 - Indicative Programme Phases & Timeline

Programme of Next Steps - Guided by *RIBA Plan of Work 2013* standard

Outline timeline of full port area development to take an estimated 3 to 4 years indicatively - multiple assumptions at this high level

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Strategic Definition – Identification of requirements



Preparation and Brief – Development of objectives, undertake feasibility studies and site review



Concept Design – Prepare concept design including cost information and issue a final project brief



Developed Design – Prepare more in-depth design incorporating updates from previous concept and meeting of design programme



Technical Design – Create Technical Design following design responsibilities matrix and project strategies including relevant subcontractors and business services information



Construction – Offsite manufacturing and onsite construction following the construction programme. Ad hoc resolution of design enquiries



Handover and Close Out – Conclusion of building contract



In Use – Conduct in use services in accordance with the schedule of services

Indicative Timeline*

Strategic Direction: Current stage
<2 months

Preparation and Brief: ~ 4 months

Concept Design: ~ 3 months

Developed Design: 6-9 months

Technical Design: 6 -12 months

Construction: 18 - 24 months

Handover/ Close Out: ~ 1 months

3-5 year estimated duration

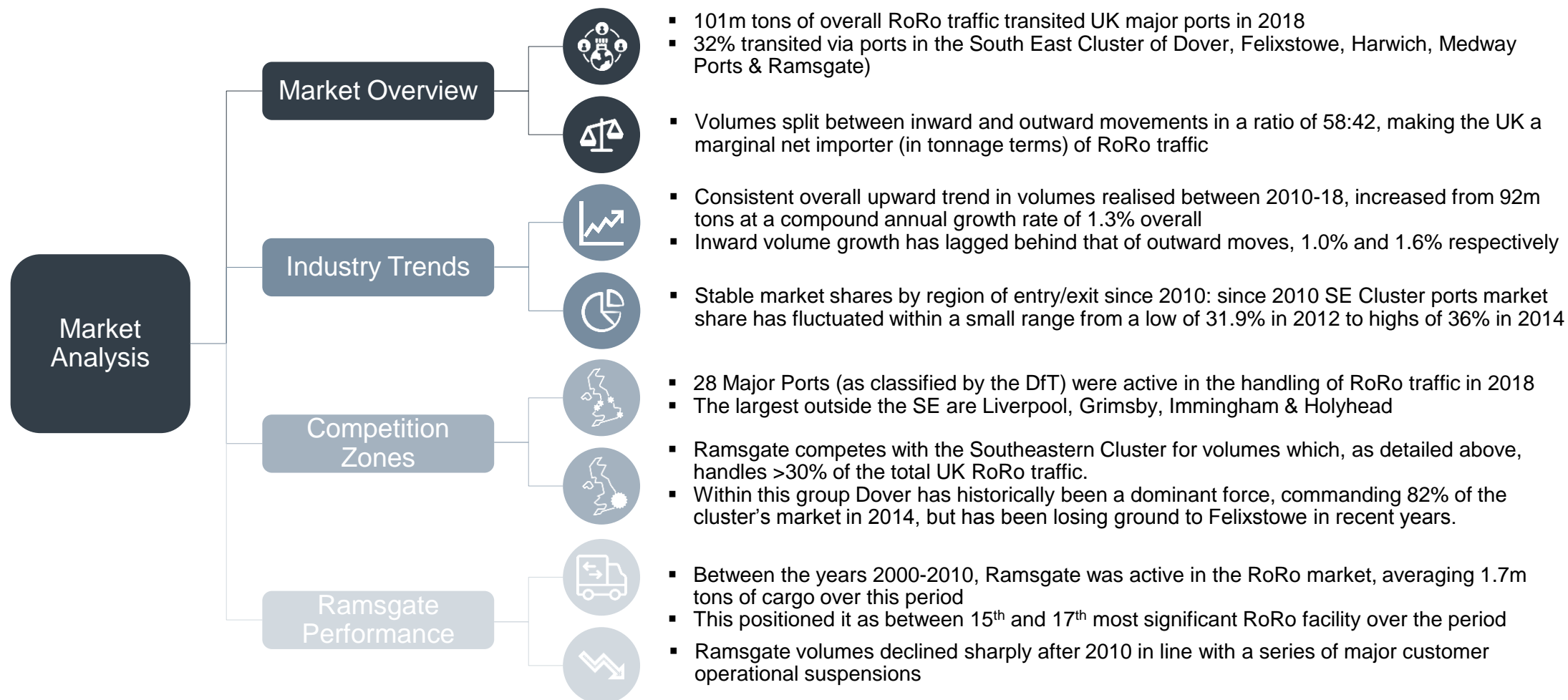
*Preliminary - based on high level assumptions and best-estimates

Appendix 1 - Supporting Analysis



Commercial Port RoRo Analysis

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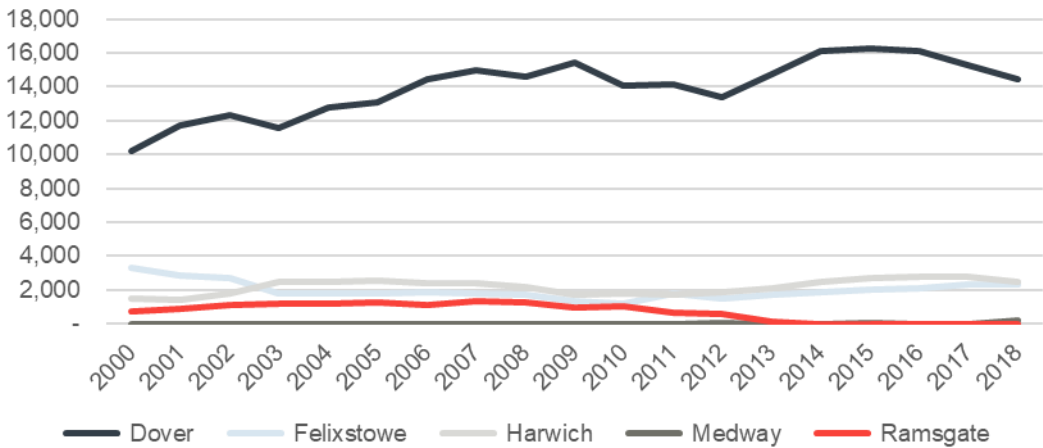


Commercial Port - RoRo

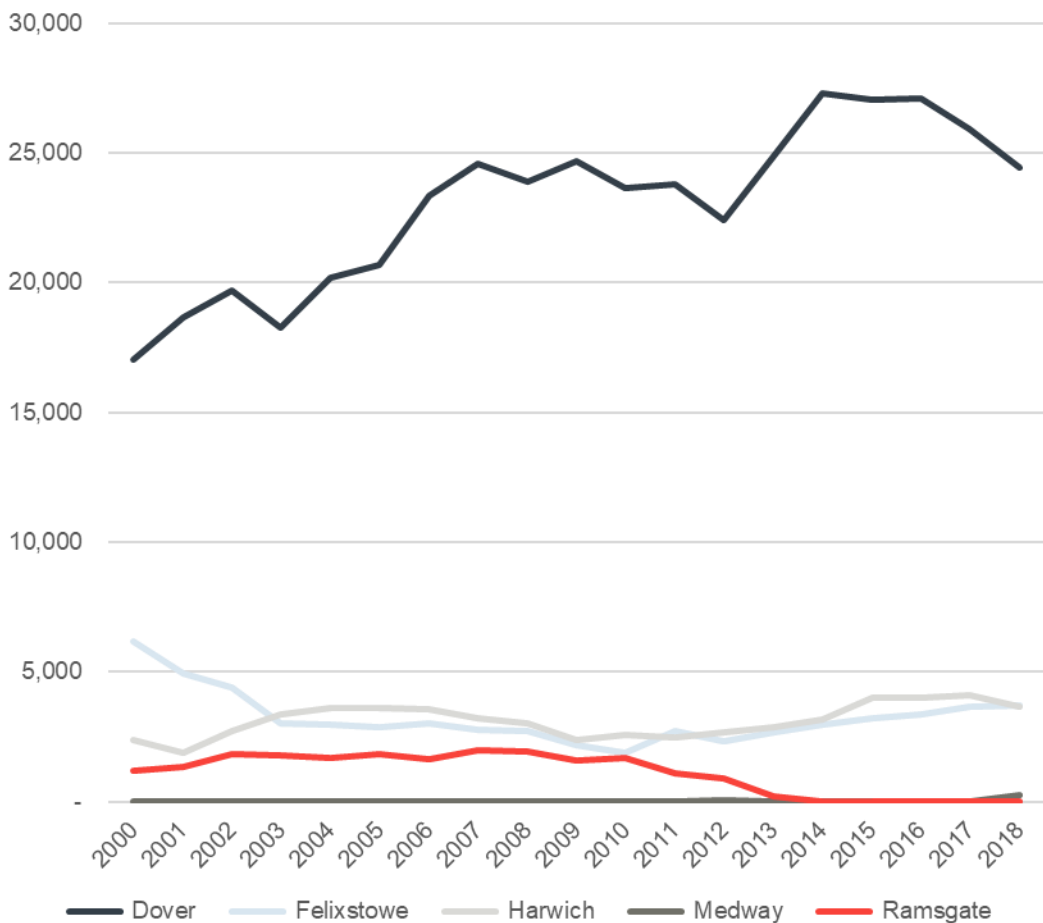
RoRo have declined at Ramsgate whereas Dover dominates local region



RoRo – Inward Traffic ('000 Tonnes)



RoRo – All traffic ('000 Tonnes)



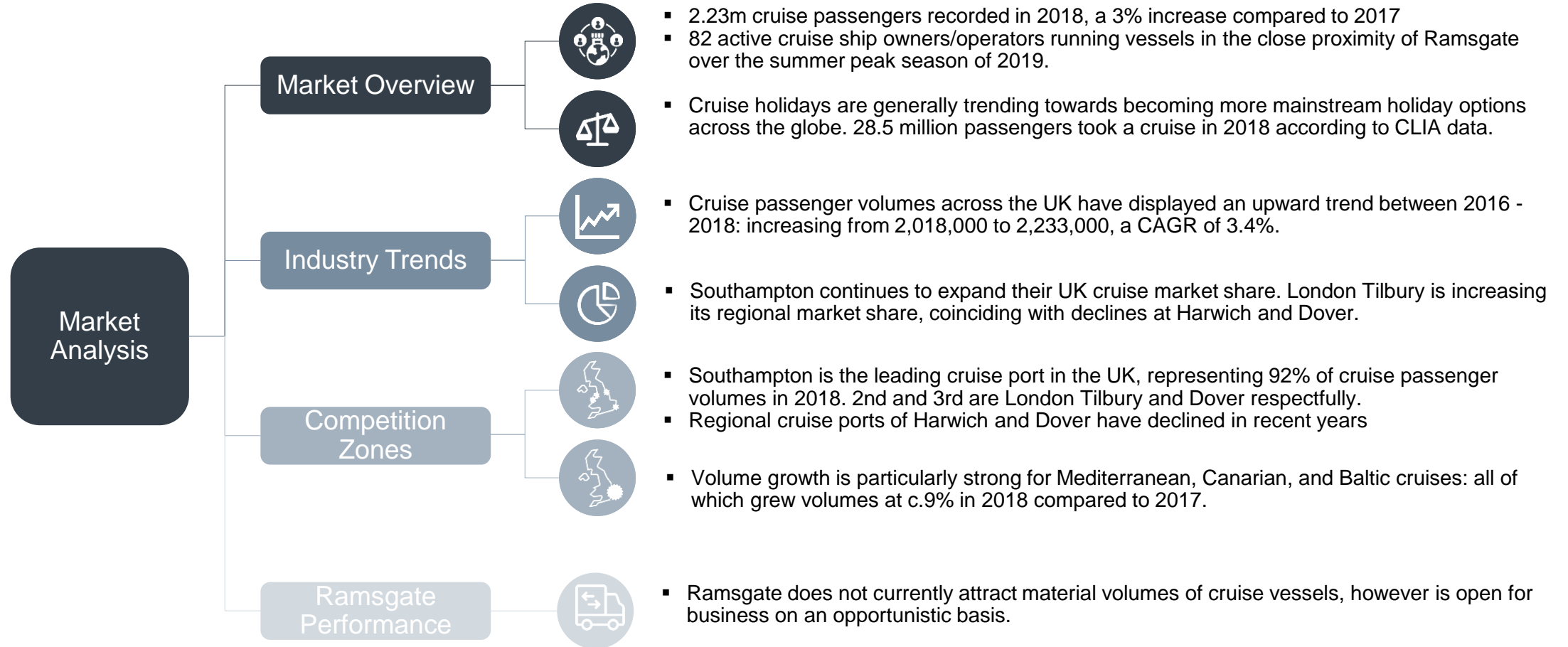
RoRo – Outward Traffic ('000 Tonnes)



Commercial Port Cruise Analysis



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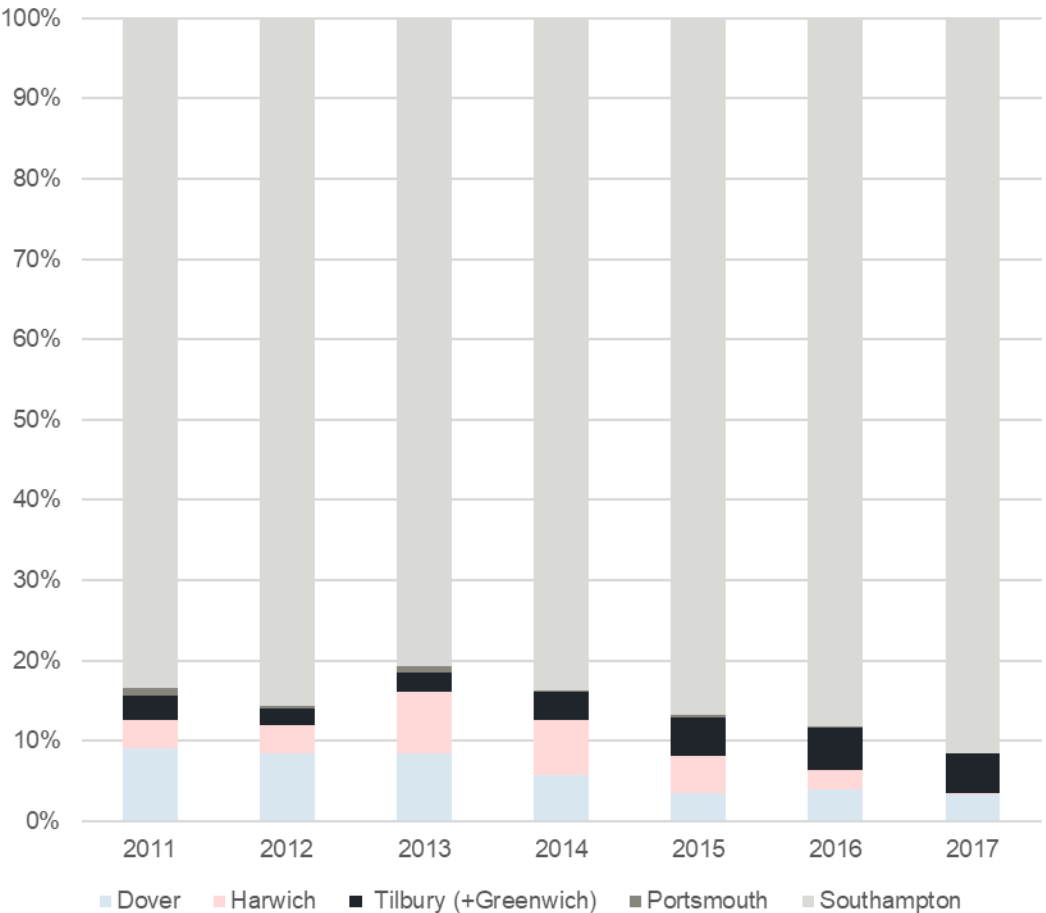


Commercial Port - Cruise

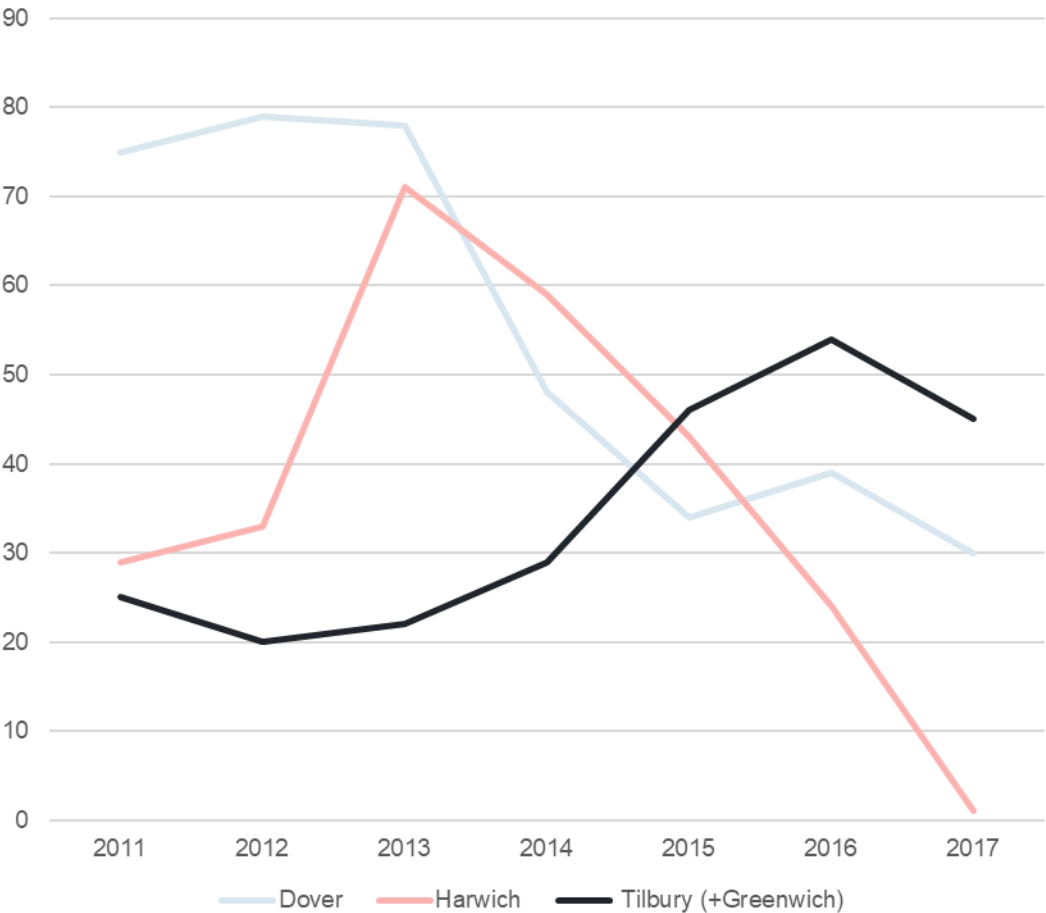
No cruise numbers have been noted at Ramsgate since 2011, with its competitors losing market share to Southampton



Annual Cruise Traffic, Local Region + South Coast Leaders (% of annual volumes)



Total Outbound Journeys ('000 Thousands Cruise Passengers)

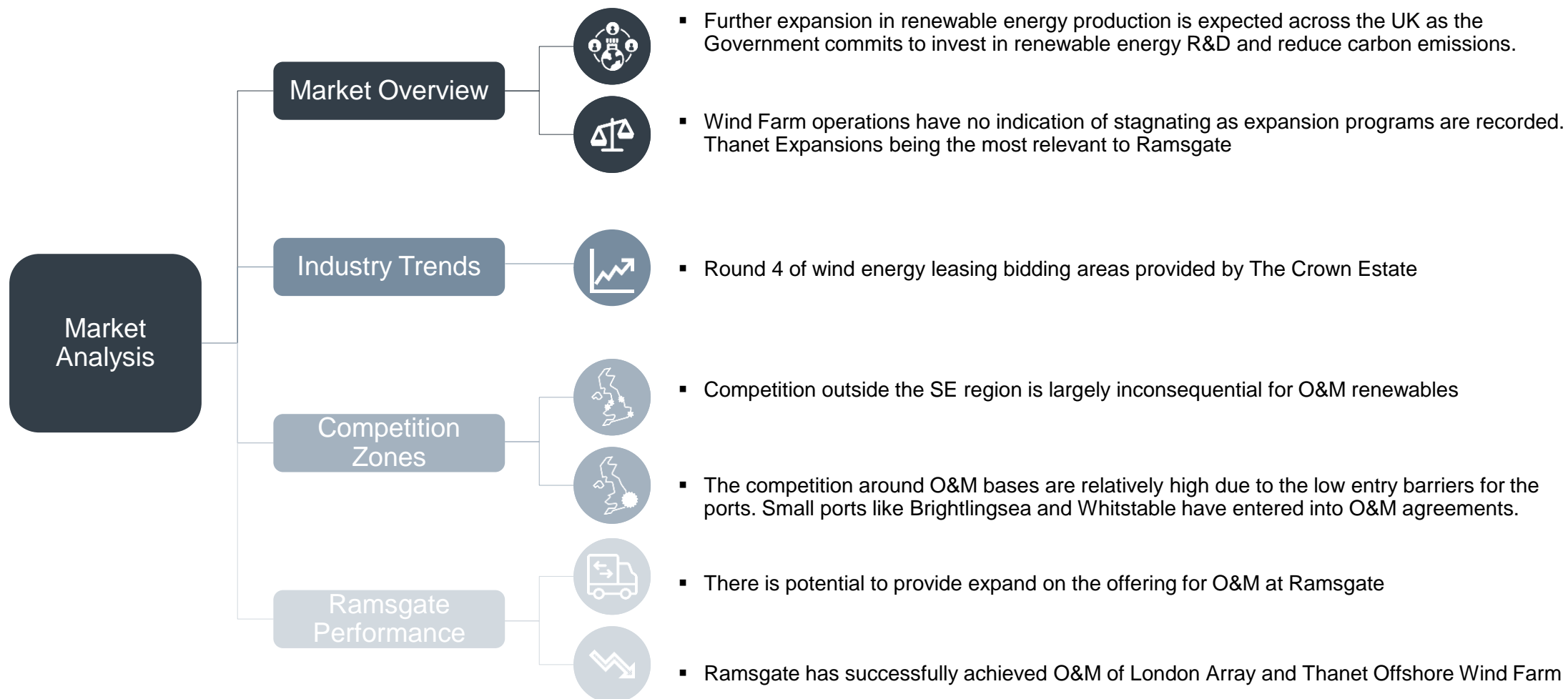


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Commercial Port Renewables O&M Analysis

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Commercial Port - Renewables O&M Summary

Ramsgate is appropriate for Offshore Wind O&M support

The map illustrates Ramsgate location in relation to the current (operating or under construction / development, i.e. TCE Rounds 1-3) projects (green) and TCE Round 4 Bidding Areas 2 and 3 (white).

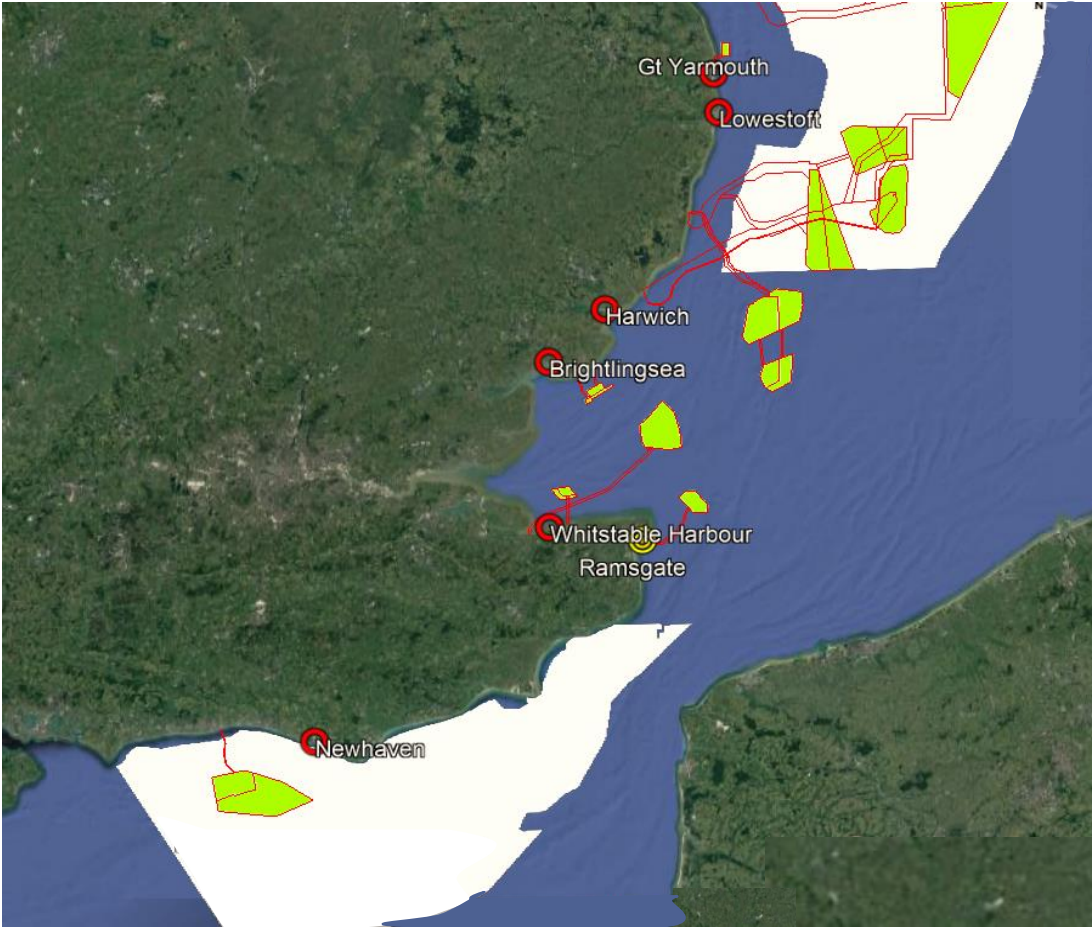
The associated O&M Ports are also shown, and summarised in the table below

Clearly whilst Ramsgate is supporting London Array and Thanet, it is not the closest to any of the remaining TCE Round 1-3 projects and consideration would need to be given as to viability for any TCE Round 4 Bidding Area 3 zones, which are predominantly south and west of Dover.

The approach to O&M also needs considering, with those projects further from shore now looking more towards the larger service operating vessels, operating on perhaps a weekly or fortnightly campaign, rather than the smaller faster catamarans which operate on a daily basis from a nearby port.

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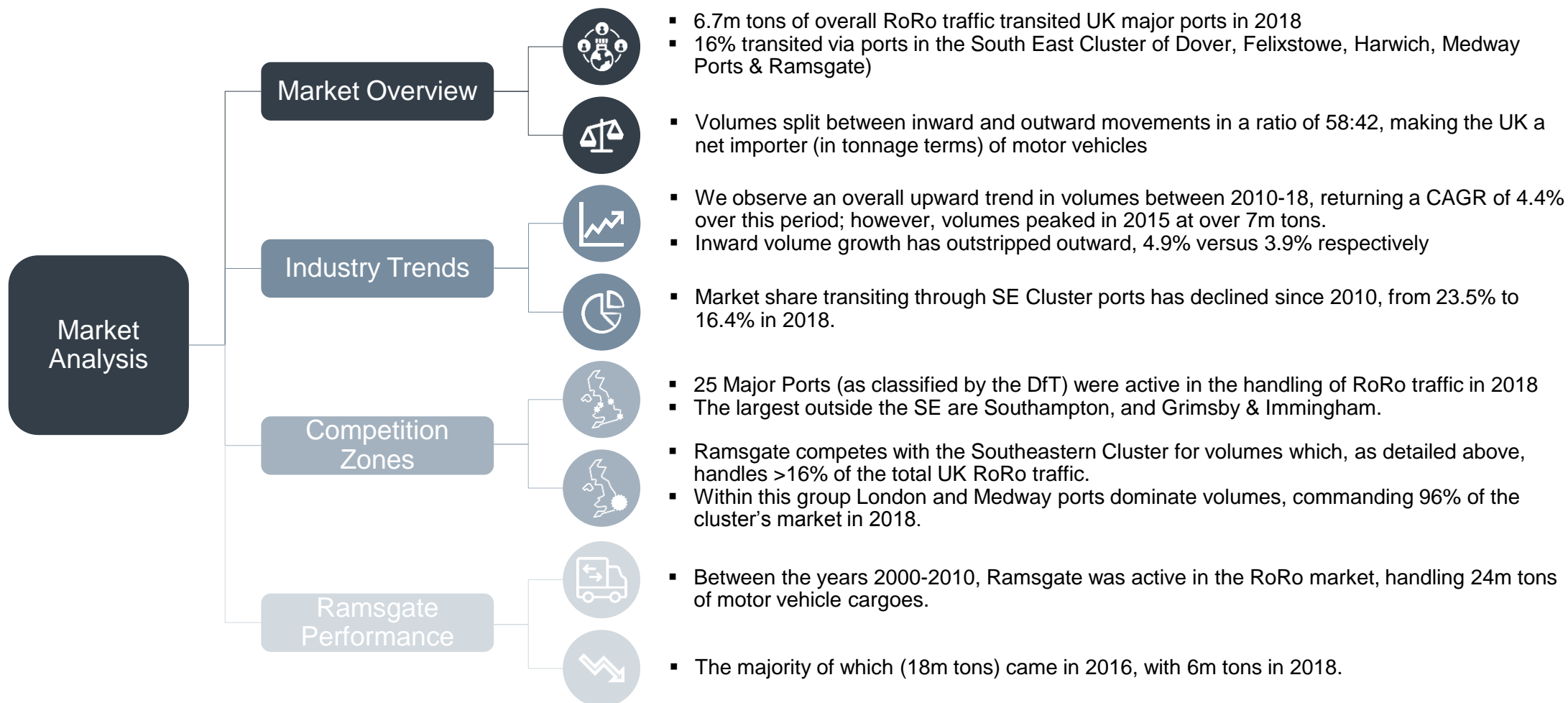
P&M Port	Wind Farm (Developer)
Great Yarmouth	Dudgeon (Equinor) Scroby Sands (Eon) Hywind (Equinor)
Lowestoft	Greater Gabbard (SSE/RWE) East Anglia One (SPR)
Harwich	Greater Gabbard (SSE/RWE) East Anglia One (SPR) Galloper (Innogy, Siemens, Sumitomo, ESN, GIB, Macquarie)
Whitstable Harbour	Kentish Flats (Vattenfall)
Brightlingsea	Gunfleet sands (Orsted)
Ramsgate	London Array (Eon / Orsted) Thanet (Vattenfall)
Newhaven	Rampion (Eon)





Commercial Port Motor Vehicles Analysis

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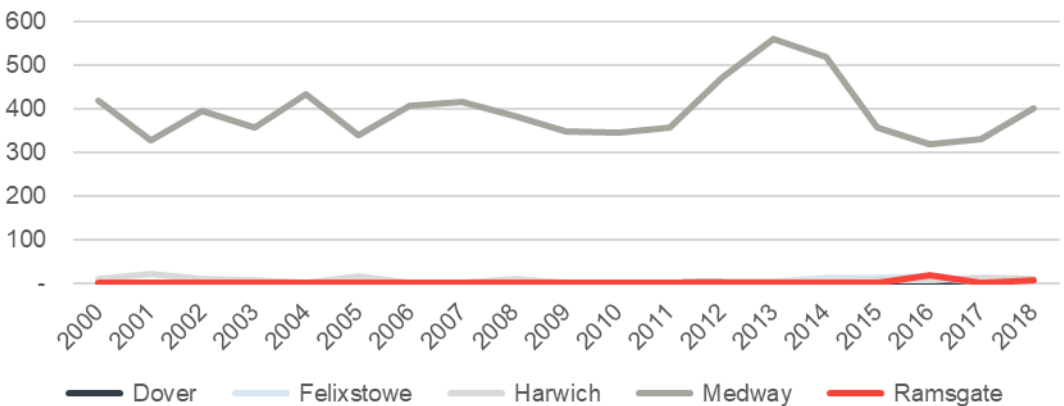


Commercial Port – Motor Vehicles

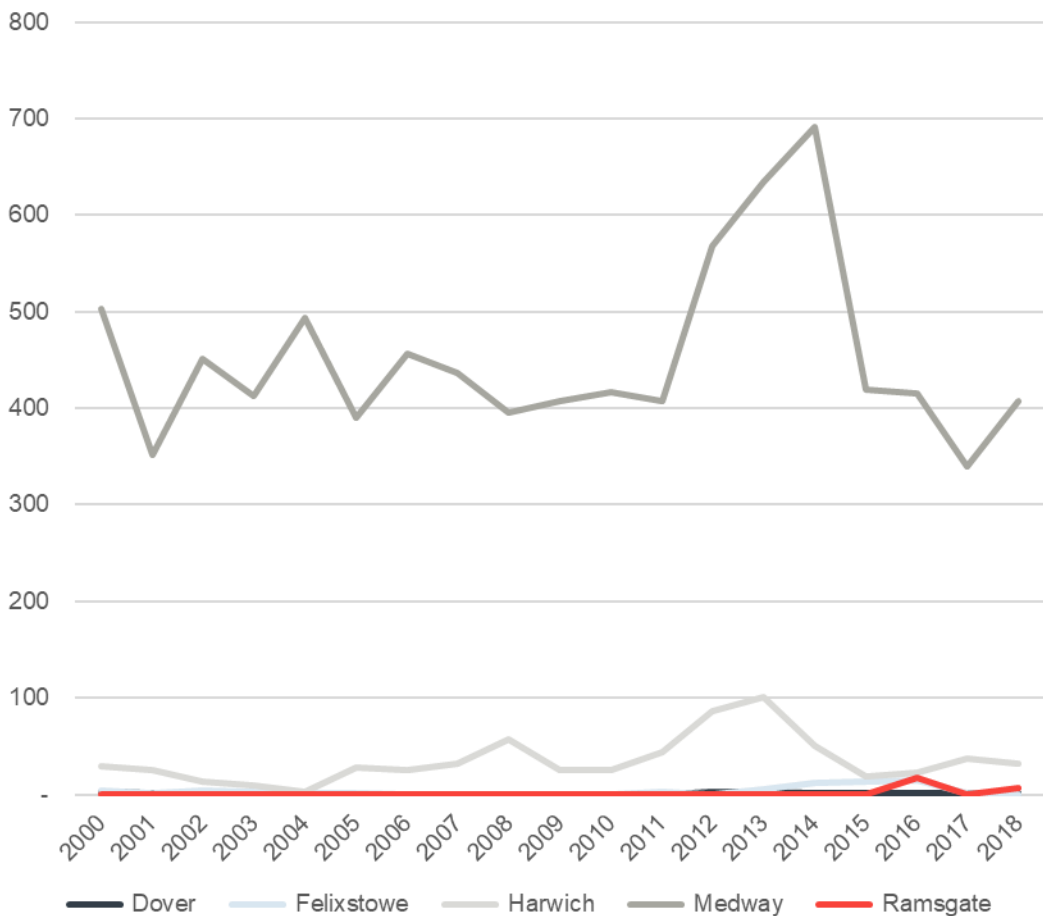
Motor Vehicles Imports/Exports perform badly in comparison to Medway



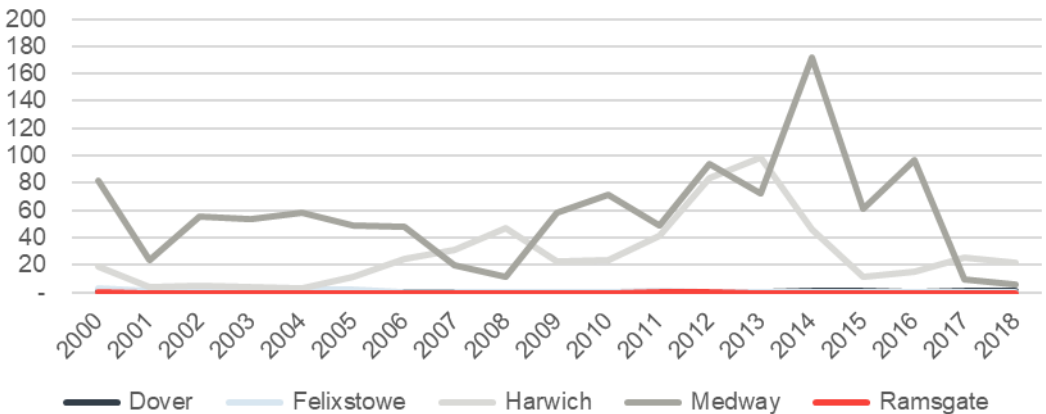
Motor Vehicles – Imports Trade ('000 Tonnes)



Motor Vehicles – All Trade ('000 Tonnes)



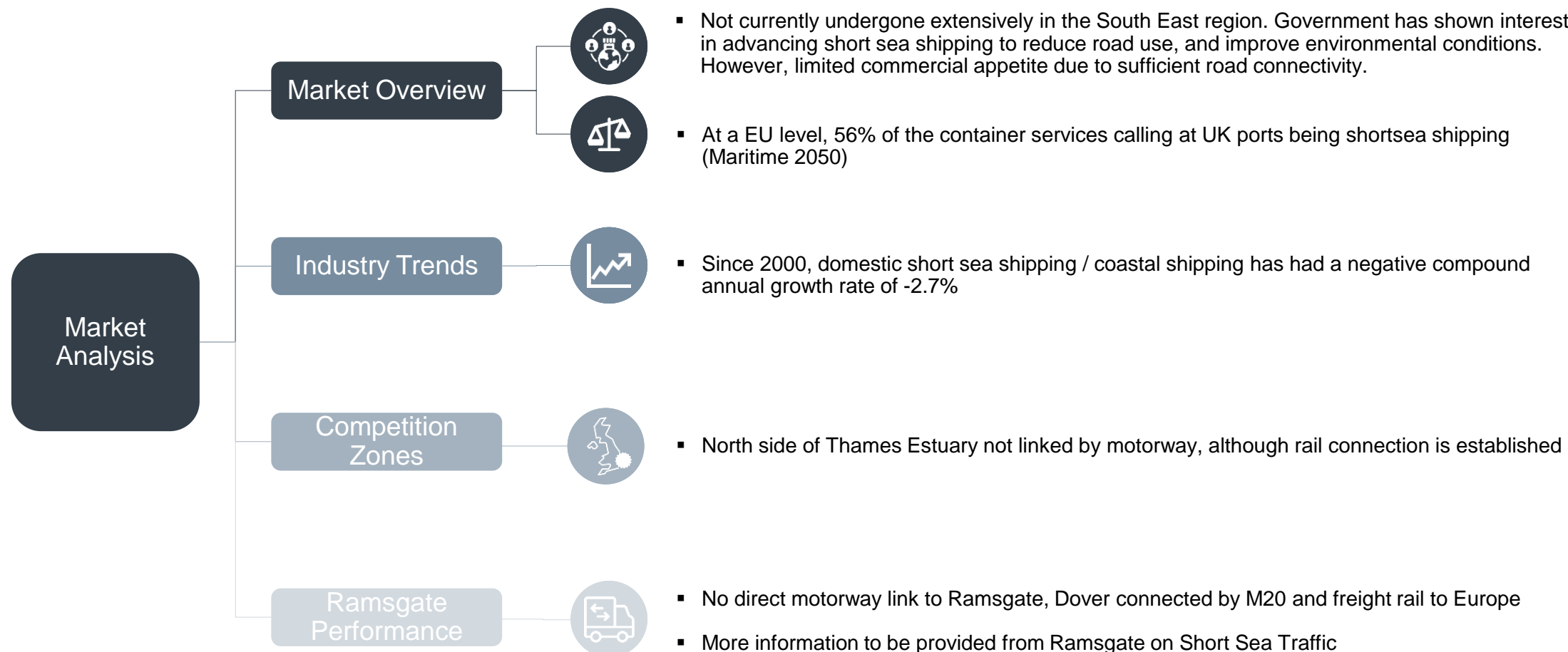
Motor Vehicles – Export Trade ('000 Tonnes)



Commercial Port Short Sea Shipping Analysis



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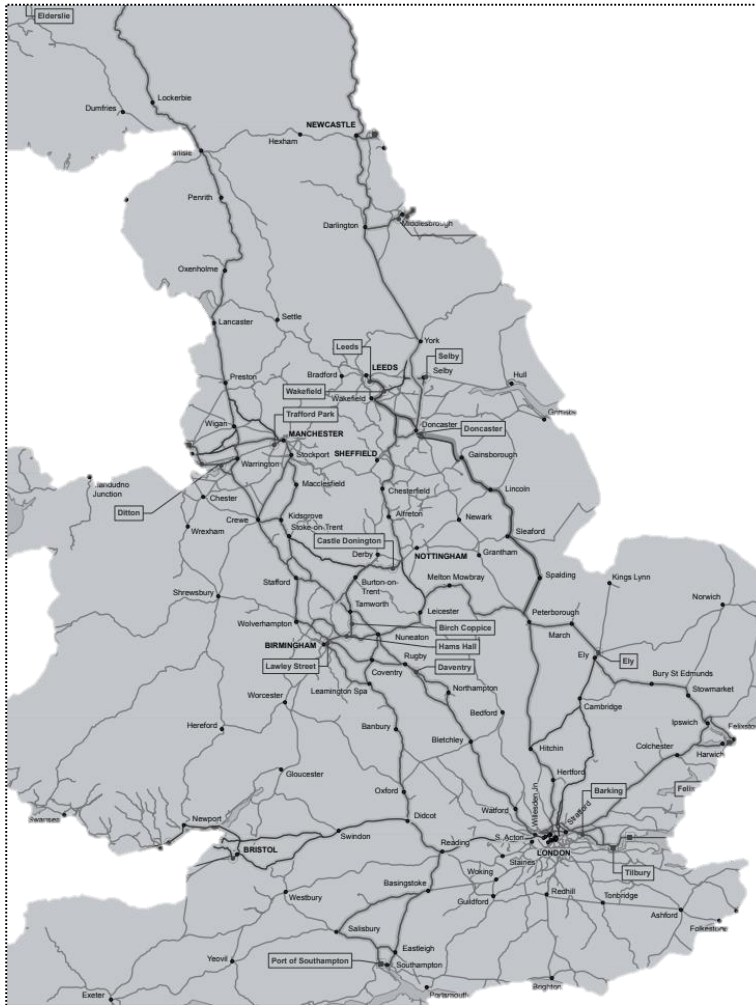


Commercial Port – Short Sea Shipping

Although connectivity and road / rail quality in the UK is high, gaps do exist – further study to gauge economic feasibility required



UK Freight Rail Network



UK Motorway Network

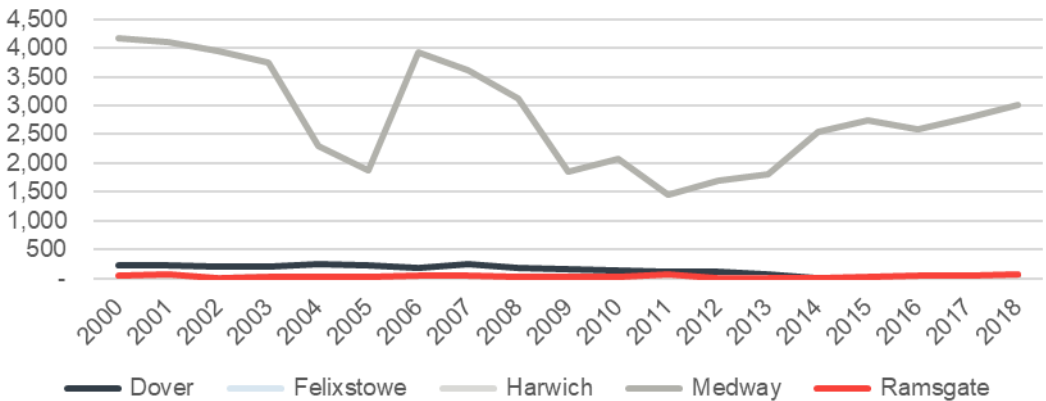


Commercial Port – Dry Bulk (Excluding Steel, Iron, Coal, & Ore)

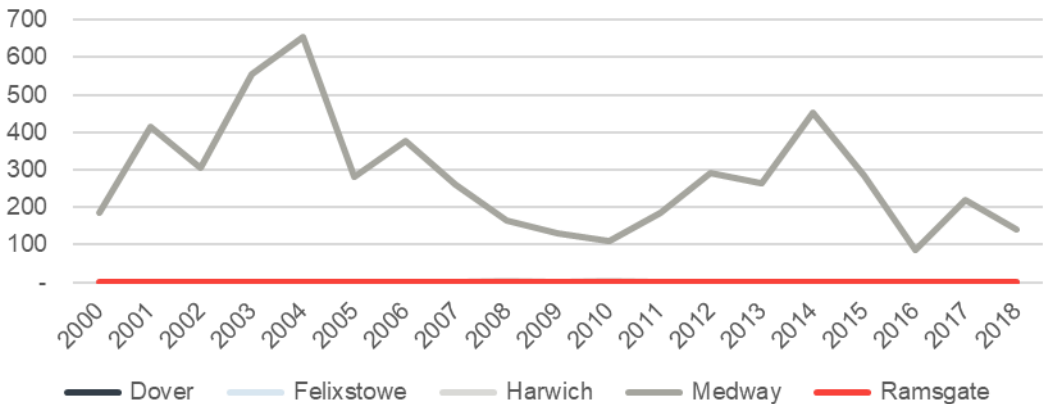
Medway dominates the region



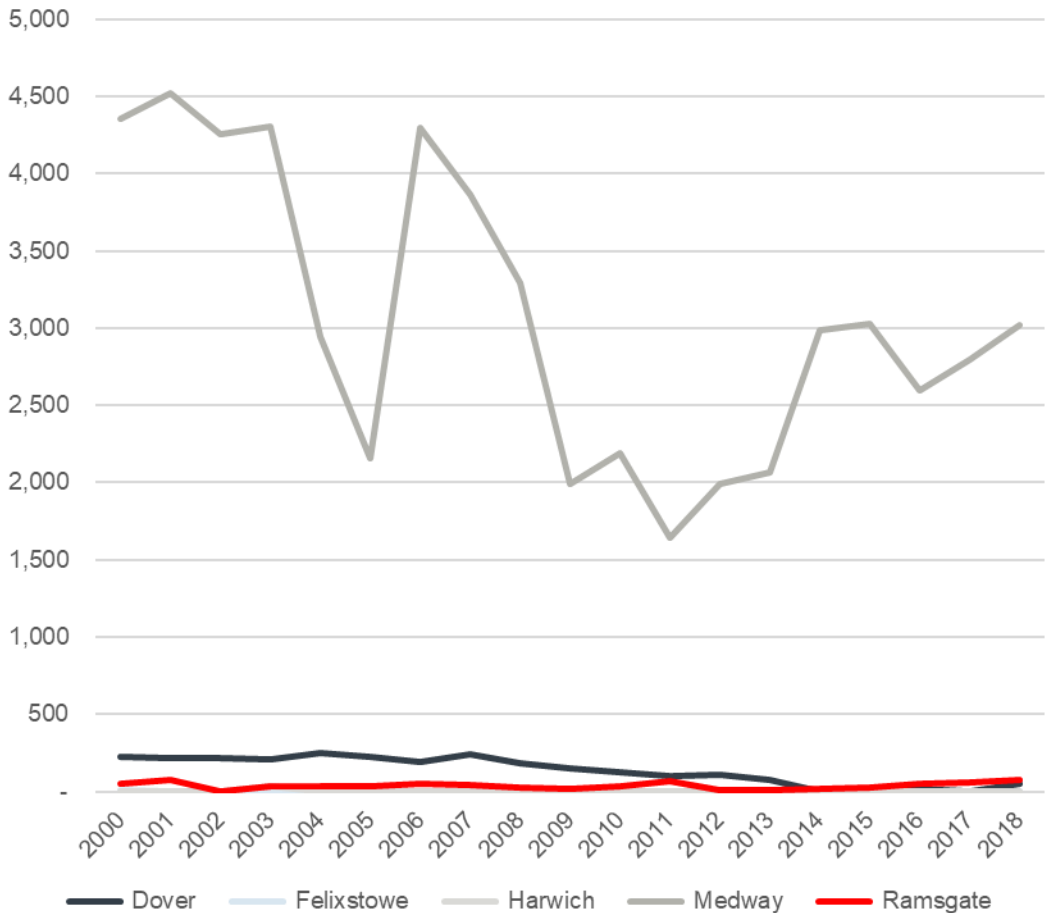
Dry Bulk – Import Trade ('000 tonnes)



Dry Bulk– Export Trade ('000 tonnes)



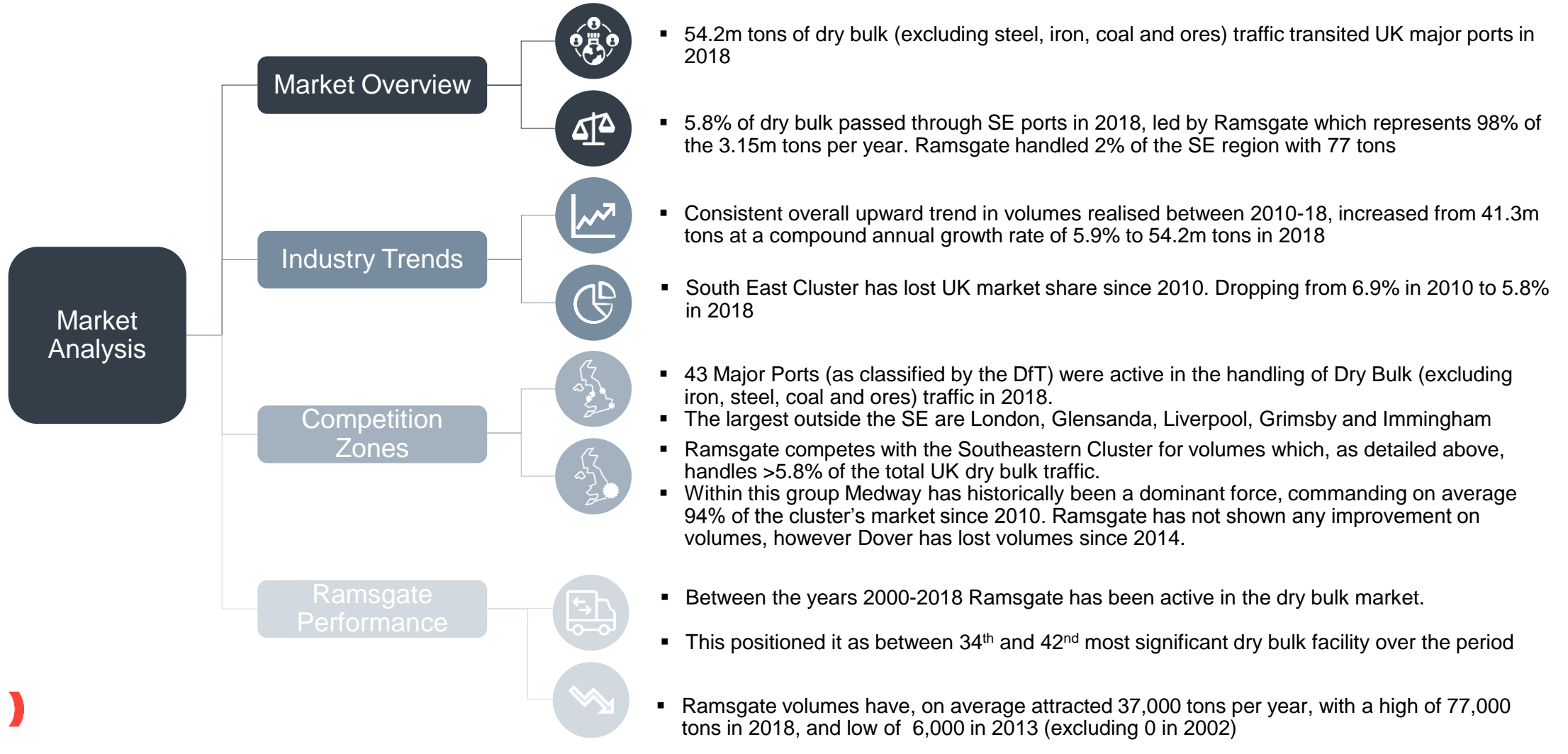
Dry Bulk – All Trade ('000 tonnes)



Commercial Port Dry Bulk (Excluding Steel, Iron, Coal & Ore) Analysis



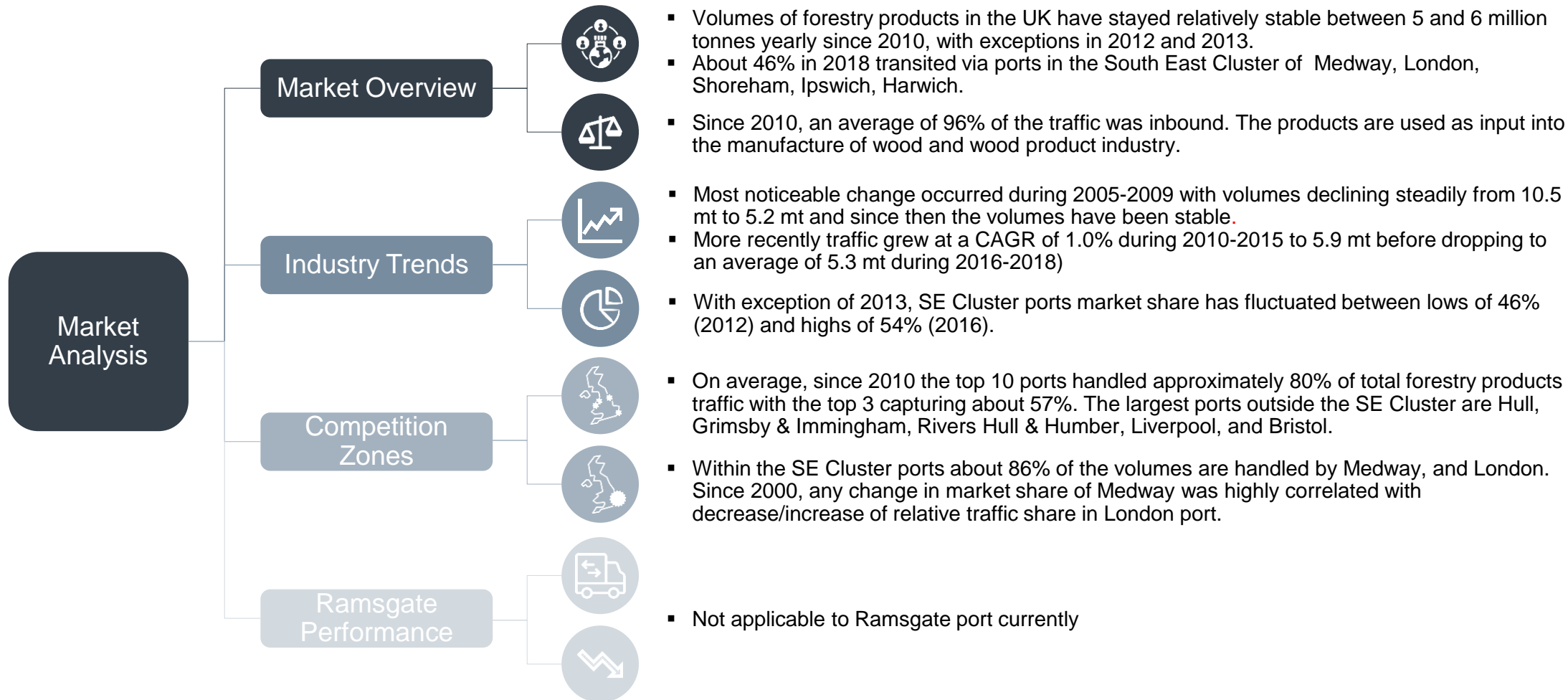
79





Emerging Analysis Forestry Products Analysis

80





Commercial Port – Forestry Products

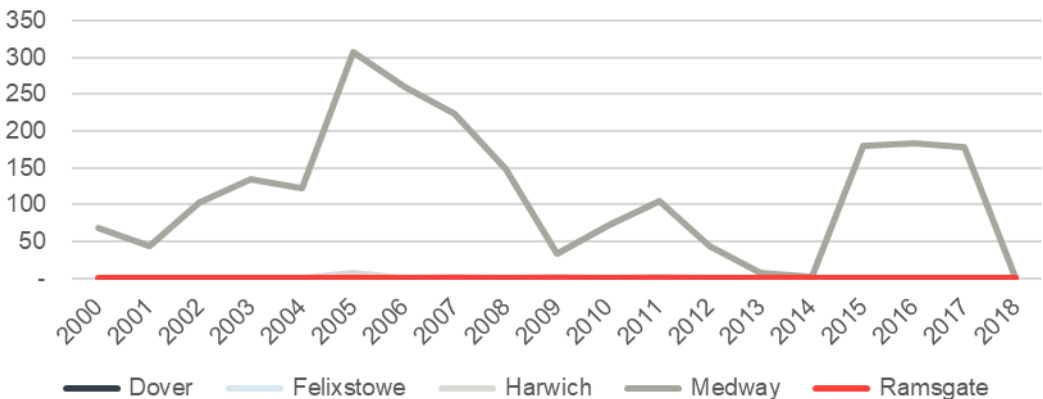
Medway dominates the region

81

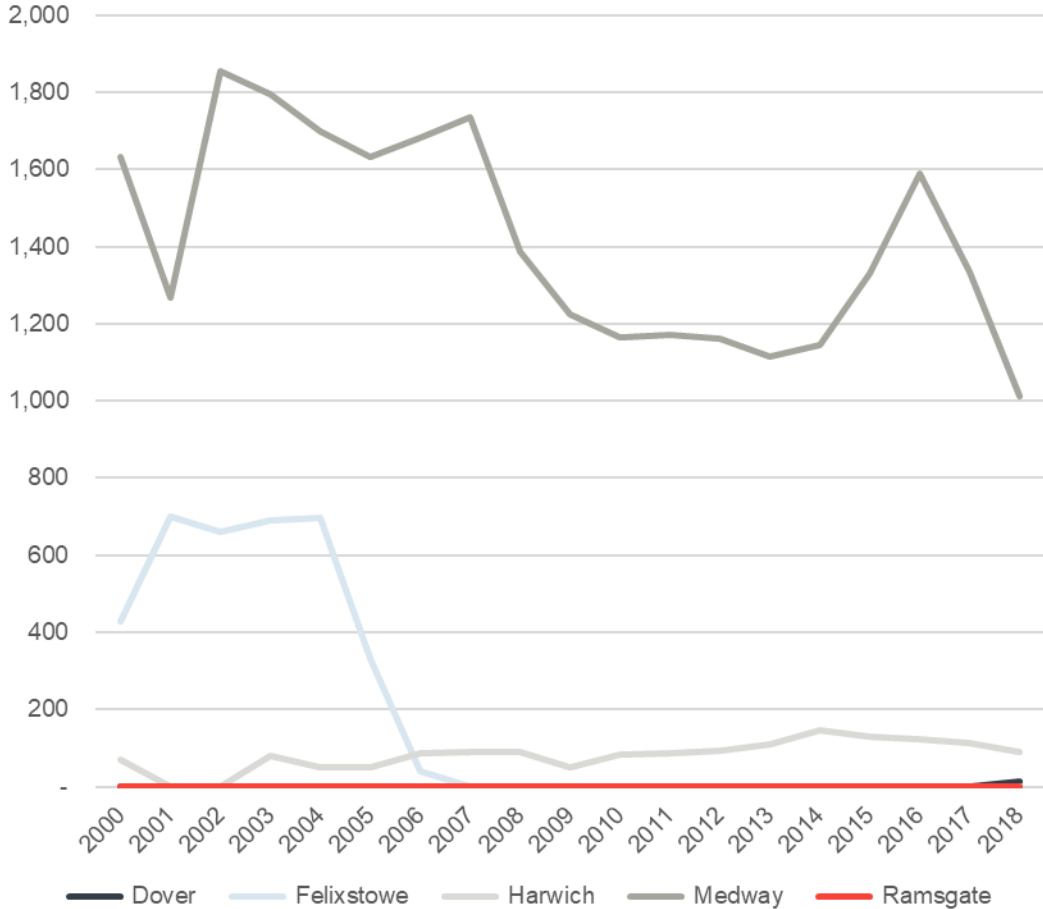
Forestry – Import Trade ('000 tonnes)

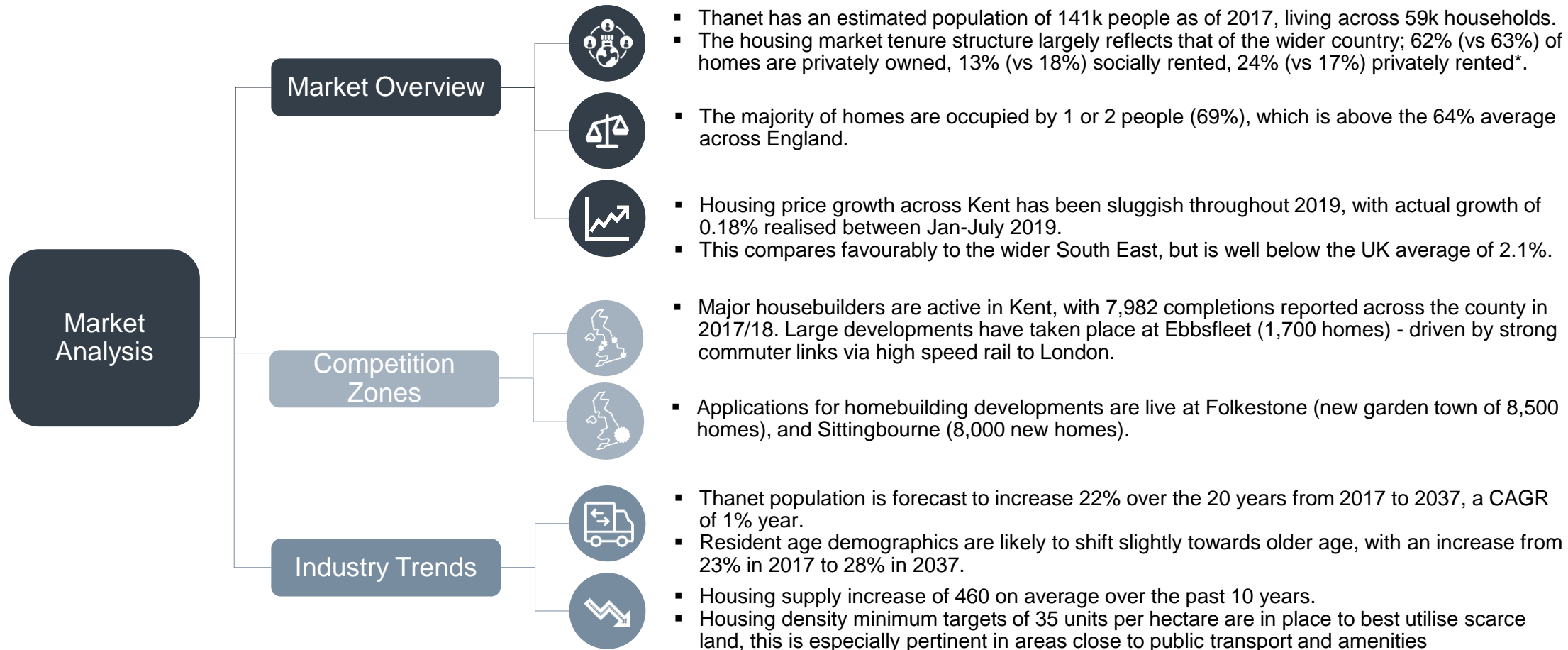


Forestry – Export Trade ('000 tonnes)

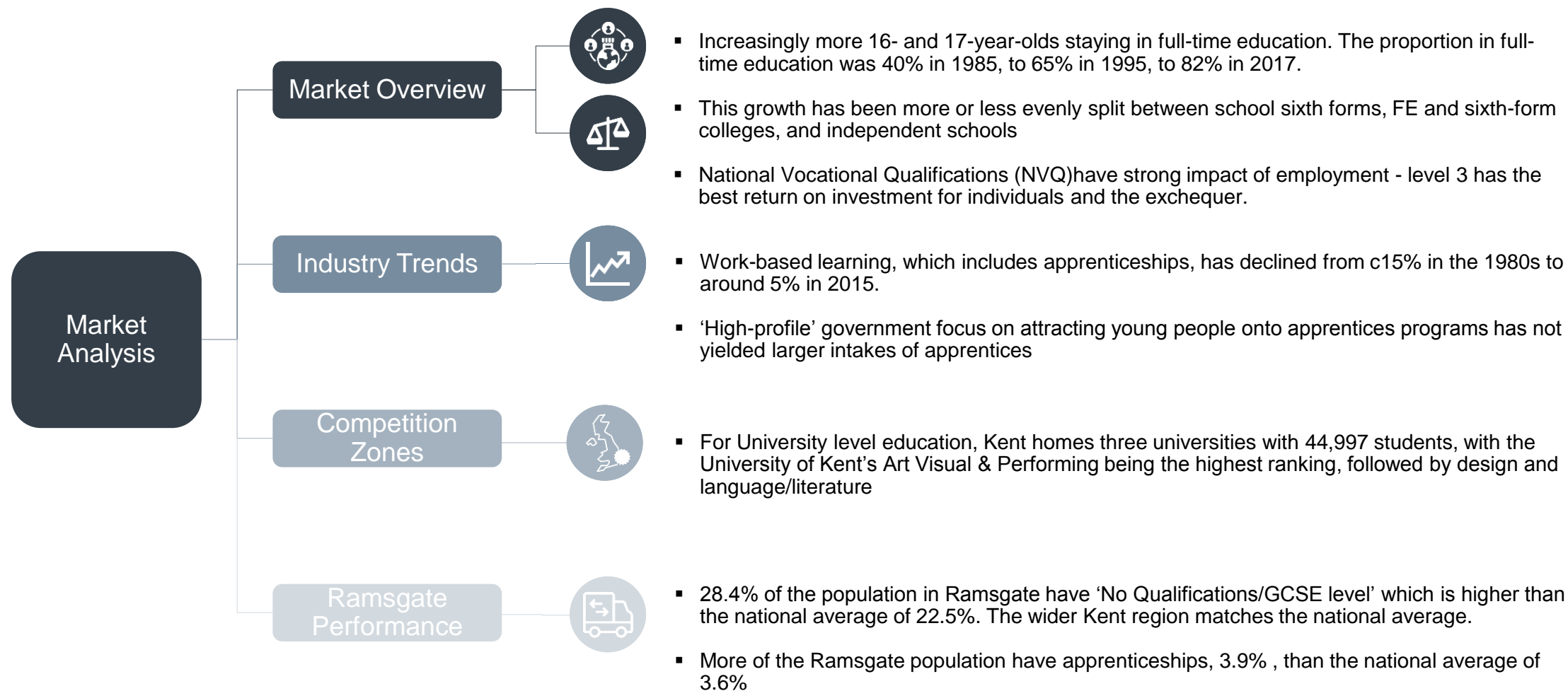


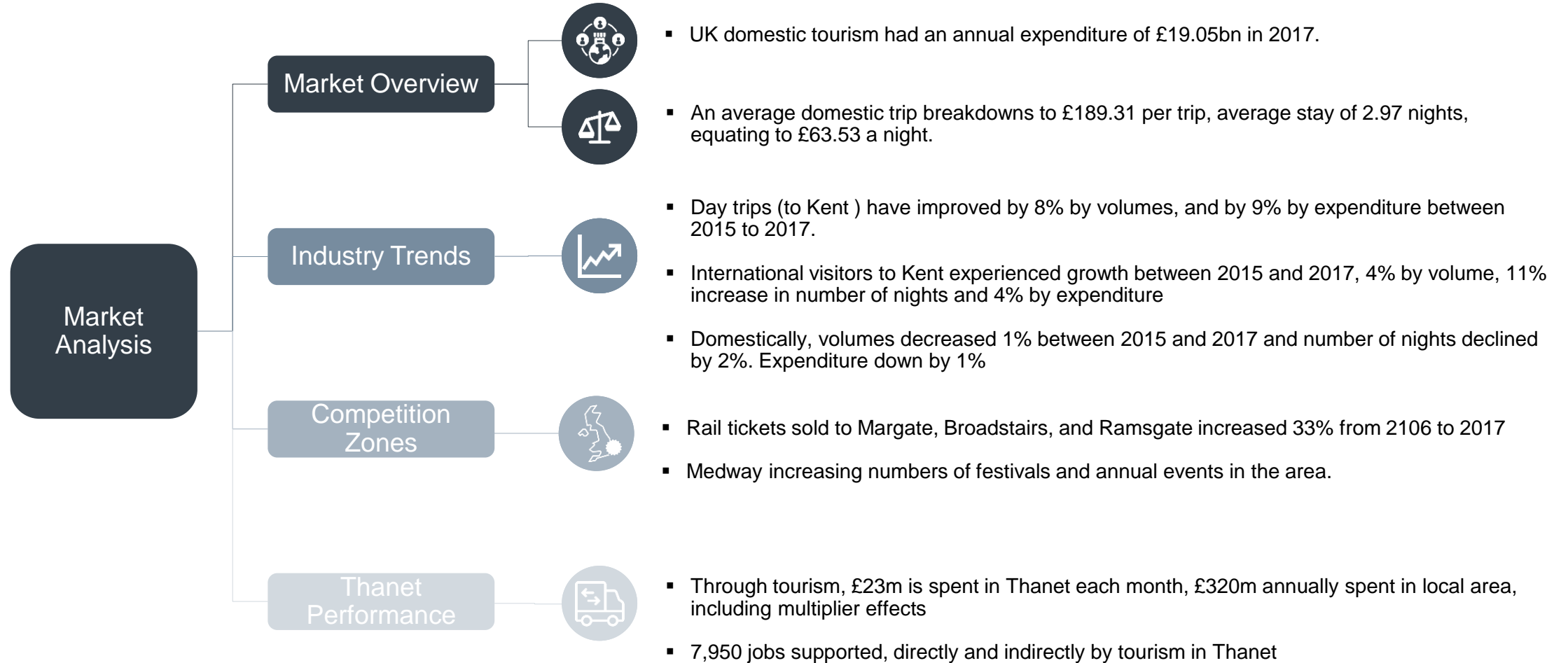
Forestry – All Trade ('000 tonnes)





* 1% are recorded as living rent-free





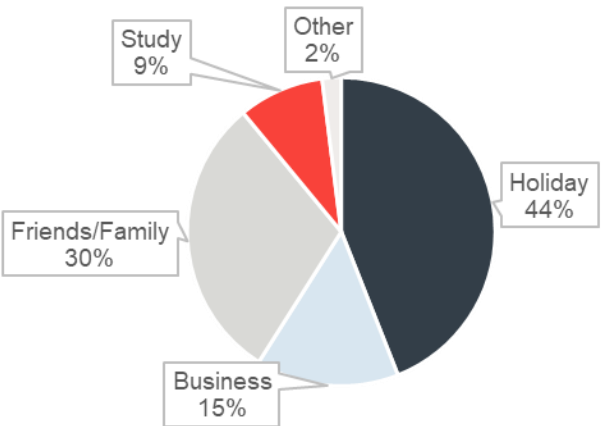
Leisure – Tourism / Retail spending

Encompassing Options of Holiday Resorts; Theme parks; Retail; Hotel; Food + Beverage

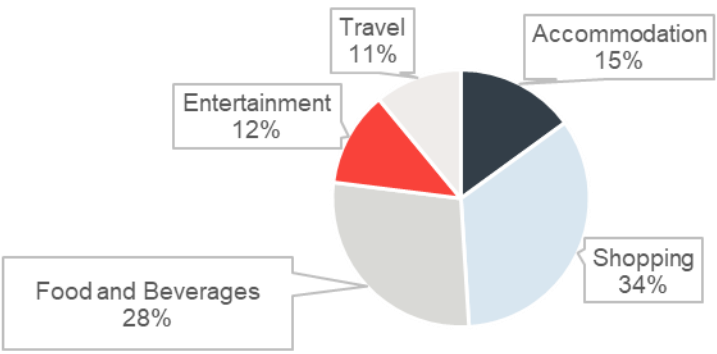


85

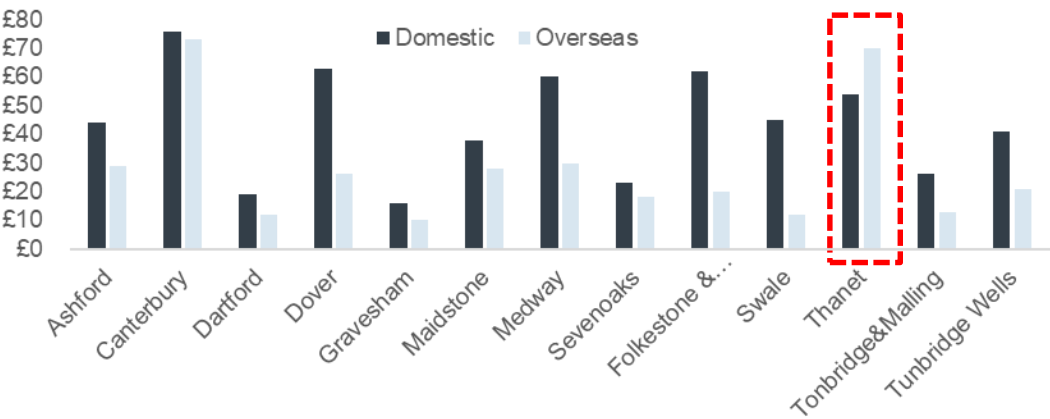
Trips by type of accommodation of trips



Breakdown of Expenditure of trips



Spend (£m) by area in Kent, by tourist origin staying visits, 2017



Spend (£m) by area in Kent & number of day trips total (m), 2017

