



Plymouth Ports Strategy

October 2024

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PLYMOUTH PORTS STRATEGY

October 2024



1 Introduction

1.1 Aim

The overall aim of this Plymouth Ports Strategy is to understand the ecosystem of the ports and identify opportunities to maximise the future economic contribution of Plymouth's harbours to the city, support the transition to net zero and create green jobs.

1.2 Objectives

The objectives of this strategy are:

- To provide greater understanding of the different ports, how they interact, their strengths and weaknesses.
- To help Plymouth City Council officers and politicians to articulate the total contribution of the ports to Plymouth's economy.
- To develop a clear vision for the future of the ports.
- To identify opportunities and initiatives which could assist in delivering this vision, which Plymouth City Council could facilitate or champion.





1.3 Background

Plymouth’s Economic Strategy (2024-2034) aims to leverage the city’s distinctive assets, including its significant naval base, vibrant manufacturing and engineering sector, and emerging creative industries. The strategy is designed to drive investment and development, fostering a skilled workforce and economic prosperity for the region.

To be one of Europe’s most vibrant waterfront cities where an outstanding quality of life is enjoyed by everyone.

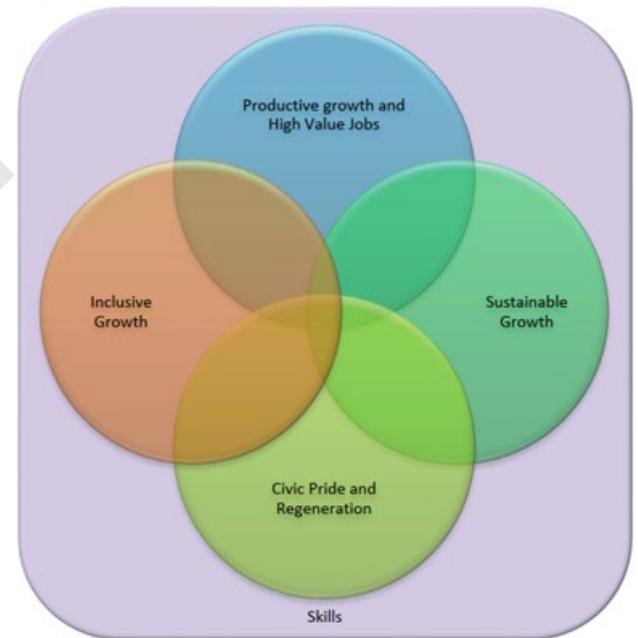
Plymouth’s Economic Strategy vision

Delivering increased prosperity through sustainable and inclusive growth.

Plymouth’s Economic Strategy aim

To deliver this vision and aim, there is a focus on four interlocking pillars as shown adjacent. In addition, there are cross-cutting pillars of skills and workforce development, and digital technologies. These overlapping and intertwined pillars are the starting point for this economic strategy for Plymouth ports.

Figure 1.1 Plymouth Economic Strategy – four interconnected pillars



▲ Source: Plymouth Economic Strategy 2024 (Plymouth City Council)



1.4 Methodology

This document has been prepared by Mott MacDonald for Plymouth City Council, using funding from the Shared Prosperity Fund. The study was undertaken from February to September 2024. The main steps of the project methodology are shown below.

Figure 1.2 Project Methodology



Step 1:	Step 2:	Step 3:	Step 4:	Step 5:
Conduct structured discussions with public and private stakeholders to understand current operations, constraints, and growth opportunities.	Create a socio-economic baseline of information for Plymouth and the Ports, reviewing the local labour market, port activities and potential local and national growth areas.	Review baseline information, conduct a SWOT analysis, outline key port constraints, and present initial findings.	Develop a strategic vision for the ports based on the preceding analysis.	Identify and refine a series of opportunities to implement the vision and support Plymouth's economic aims.

▲ Source: Mott MacDonald



1.5 Baseline Review

In July 2024, a Baseline Review was completed to record the baseline evidence which has informed this strategy through an understanding of the role of the ports and their impact in Plymouth and the wider region.

This analysis was informed by engagement with key stakeholders, including Harbour Authorities, port operators and others. Their insight was combined with a review of previous publications and independent research.



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▲ Source: Mott MacDonald



1.6 Stakeholder Engagement

The project has engaged with numerous key stakeholders to gather knowledge of the port operations, their interfaces, constraints, opportunities and current initiatives. This has comprised meetings, structured interviews and an online questionnaire, comprising the following stakeholders:

- Plymouth City Council, including Economic Development, Planning, Transport.
- Turnchapel Wharf (Yacht Havens Group).
- Associated British Ports (ABP).
- Cattewater Harbour Commissioners.
- Sutton Harbour Group.
- Celtic Sea Power.
- Oceansgate.
- Victoria Wharf/Group.
- Plymouth National Marine Park.
- King's Harbour Master (KHM).
- Brittany Ferries.
- Maritime UK South West.
- Plymouth Fishing & Seafood Association.
- Interfish.
- Princess Yachts.
- Mayflower Marina.
- The Crown Estate.
- Offshore Renewable Energy Catapult.
- Devon and Plymouth Chamber.
- Destination Plymouth.
- Plymouth Growth Board.
- University of Plymouth.
- Pantaenius UK Limited.
- Tamar Estuaries Consultative Forum.





2 Plymouth Ports Today

2.1 Description

Port Extents and Operations

The Dockyard Port of Plymouth is under the statutory control of the KHM. The port serves HMNB Devonport, the largest naval base in Western Europe and land user in Plymouth. Devonport has several strategic roles supporting the continuous deterrent and striking capabilities, as well as being home to submarine refit facilities, the Maritime Operating Base and Royal Navy training.

Within the Dockyard Port of Plymouth there are multiple commercial and recreational uses. Cattewater is home to several commercial wharves handling fuel, feed, cement, and clay in and out of the South West. Millbay Docks, which is owned and operated by ABP, handles a range of cargo and is home to Brittany Ferries who operate regular services between Plymouth and Europe. Meanwhile, Sutton Harbour is the base for Plymouth's fishing fleet. The recreational sector includes multiple marinas, water access points, and clubs, catering to sailors, rowers, pleasure boats, canoeists, divers, surfers, and swimmers. Events hosted in the Sound range from offshore powerboat Grand Prix and local races to international sailing championships.

The Plymouth Sound has multiple designations to protect its diverse and nationally important habitats. These include marine conservation zones, special protection areas, and areas for seagrass conservation, leading to the area being selected as the UK's first National Marine Park.

There are four main harbour authorities in Plymouth:

- King's Harbour Master.
- Associated British Ports.
- Cattewater Harbour Commissioners.
- Sutton Harbour Group.

The primary harbour authority is the KHM, who operate the port under the 1865 Dockyard Ports Regulation Act and the associated Dockyard Port of Plymouth Order 2020. Within this area are the three separate statutory harbours: ABP, Cattewater Harbour Commissioners and Sutton Harbour Group.

For the purpose of this strategy, the definition and extents of Plymouth Ports is illustrated in the figures below.

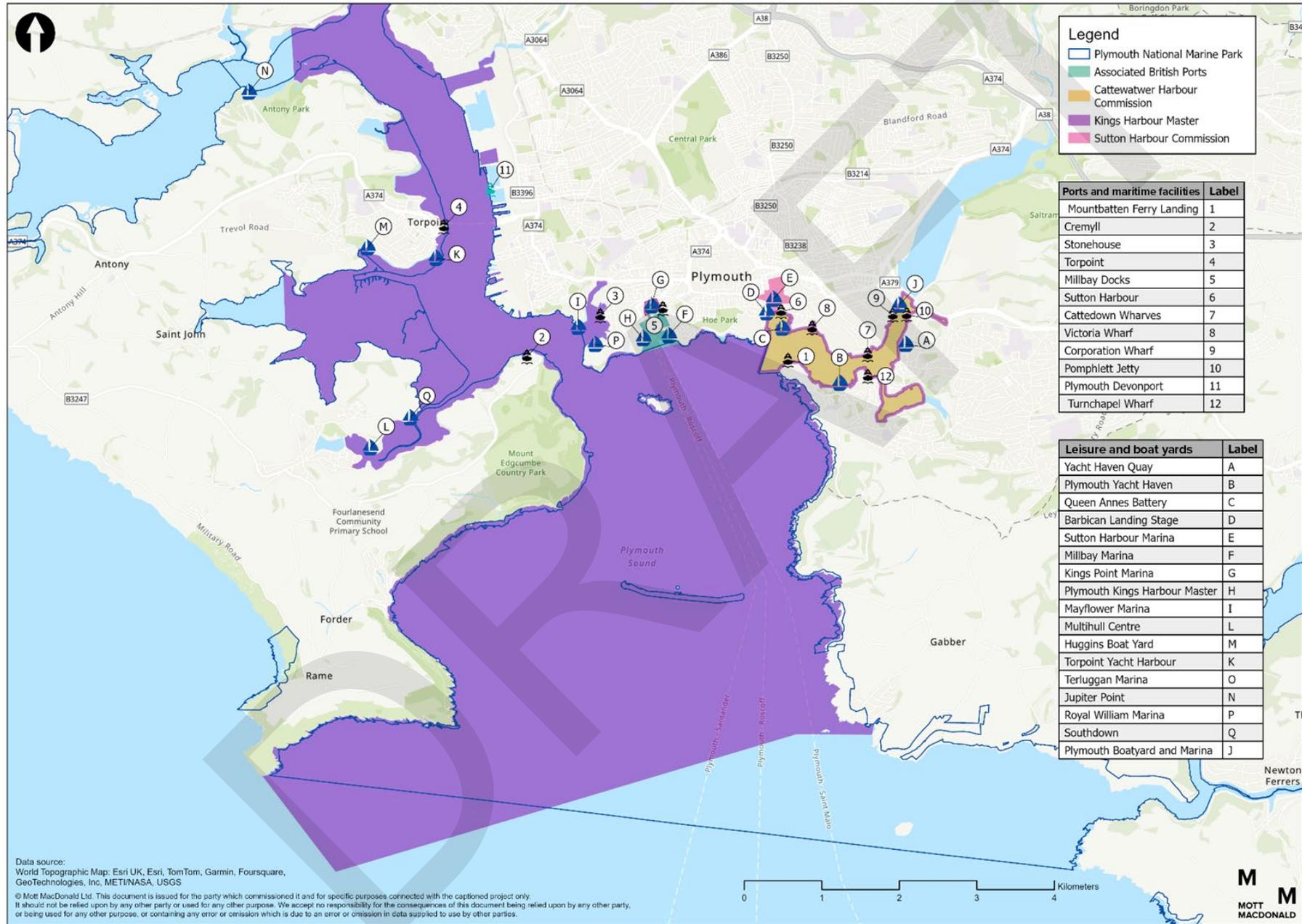
- Figure 2.1 presents a map of the geographic areas associated with the harbour authorities, together with primary port assets (such as wharves) and marinas.
- Figure 2.2 presents the key landowners in the area.

Three infographics summarise key findings and statistics for the baseline stages in the figures below.

- Figure 2.3 presents the Strength in Diversity within the ports.
- Figure 2.4 presents Heritage and Landscape located in Plymouth.
- Figure 2.5 presents the ports as a Catalyst for Growth, and outlines the economic impact maritime and defence employment has on Plymouth.



Figure 2.1 Plymouth Ports - Geographic areas and maritime assets



▲ Source: Mott MacDonald



Figure 2.2 Plymouth Ports – Land ownership and employment areas

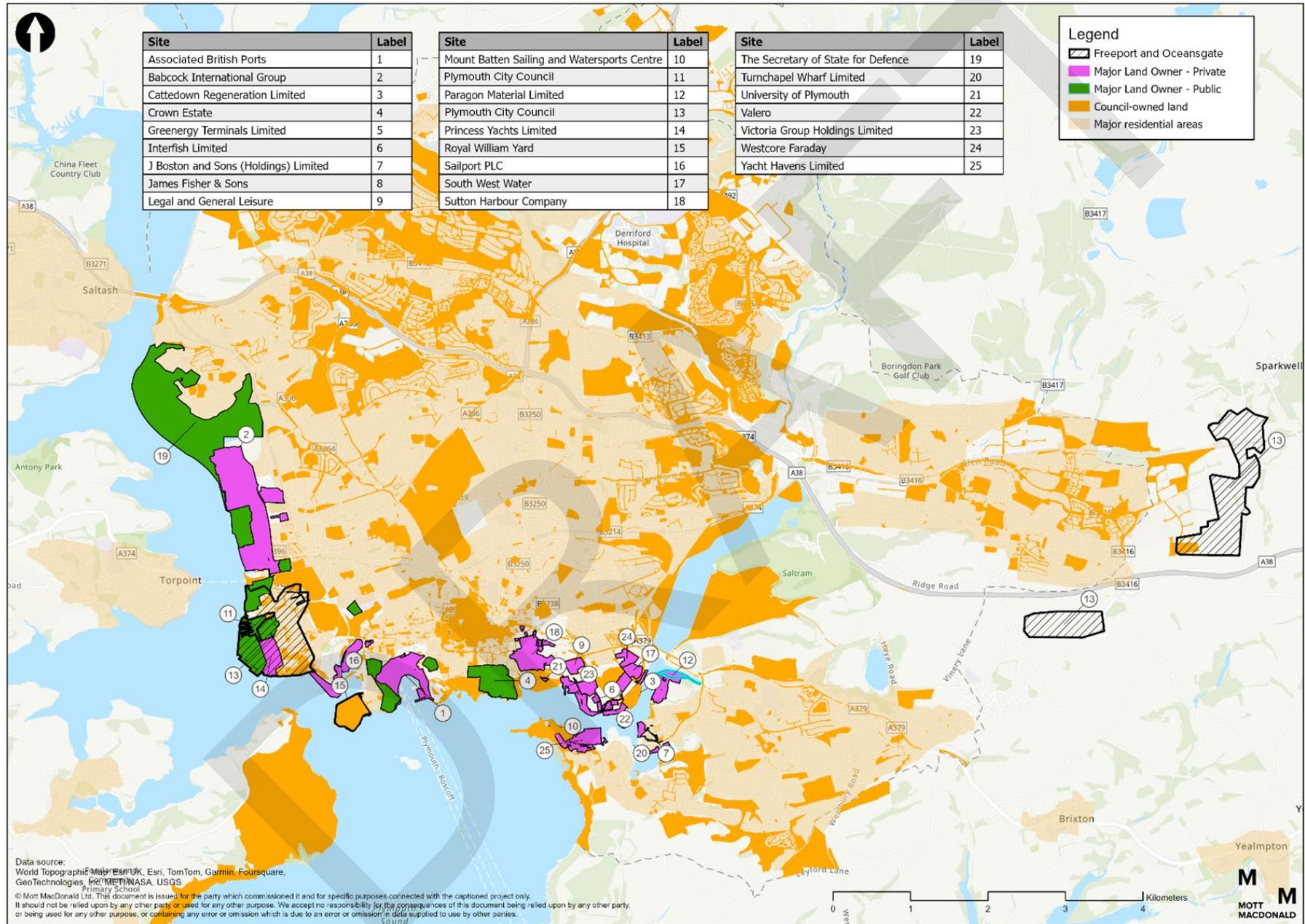
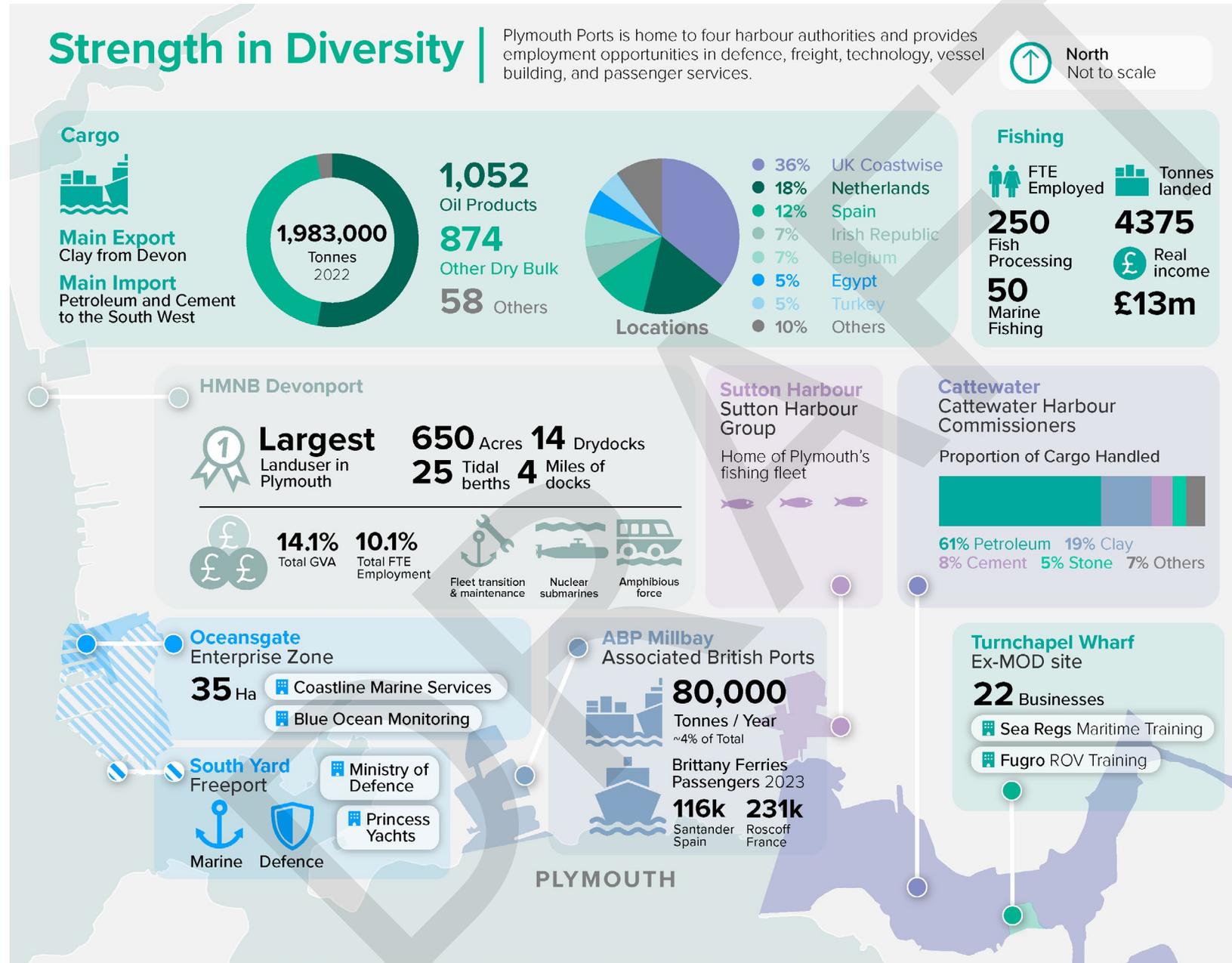




Figure 2.3 Strength in Diversity



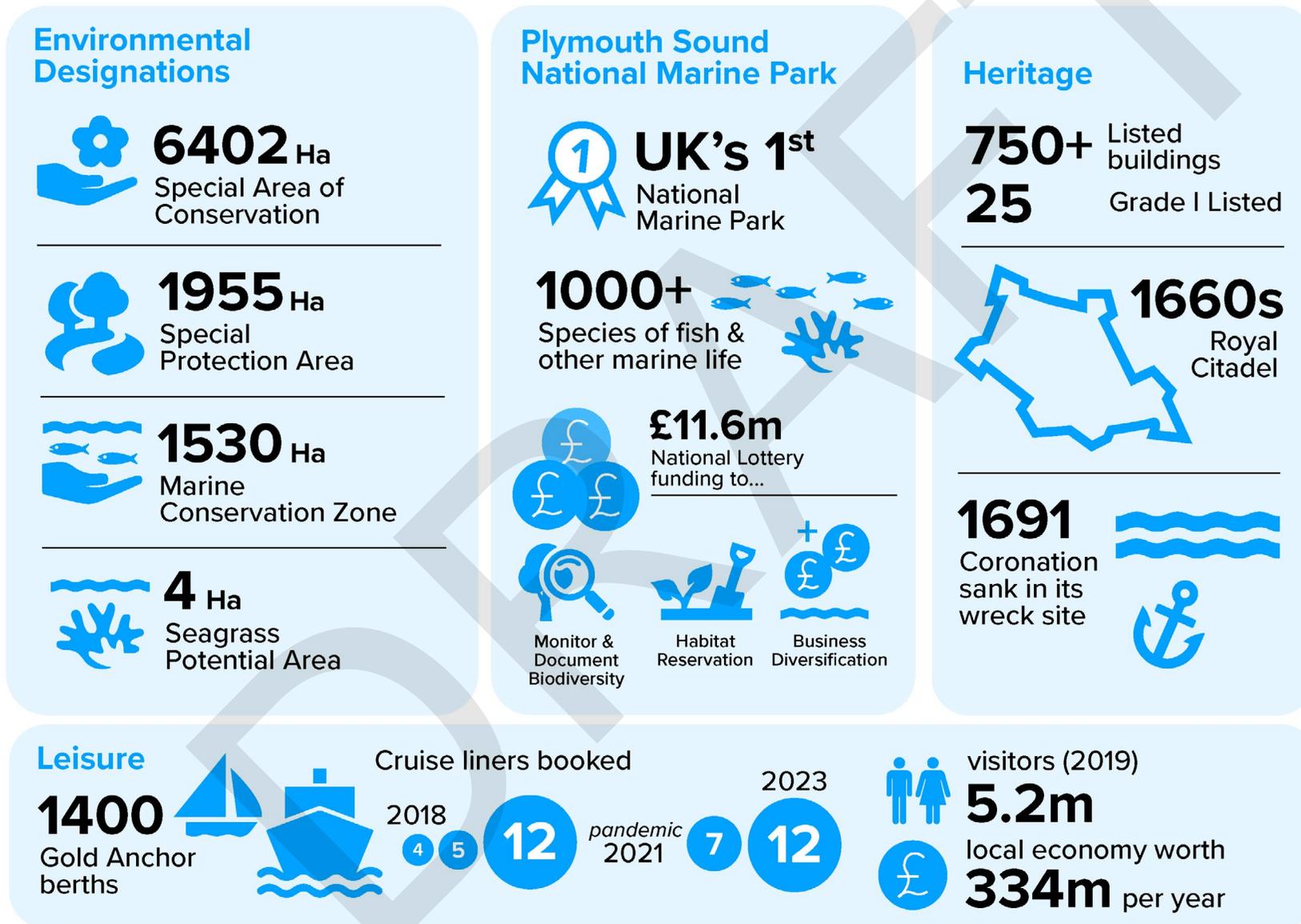
▲ Source: Mott MacDonald



Figure 2.4 Heritage and Landscape

Heritage and Landscape

Plymouth boasts centuries of maritime heritage, which has become a key attraction for visitors. Coupled with this, the unique environmental setting in the Sound and Tamar adds to its appeal and supports conservation research.

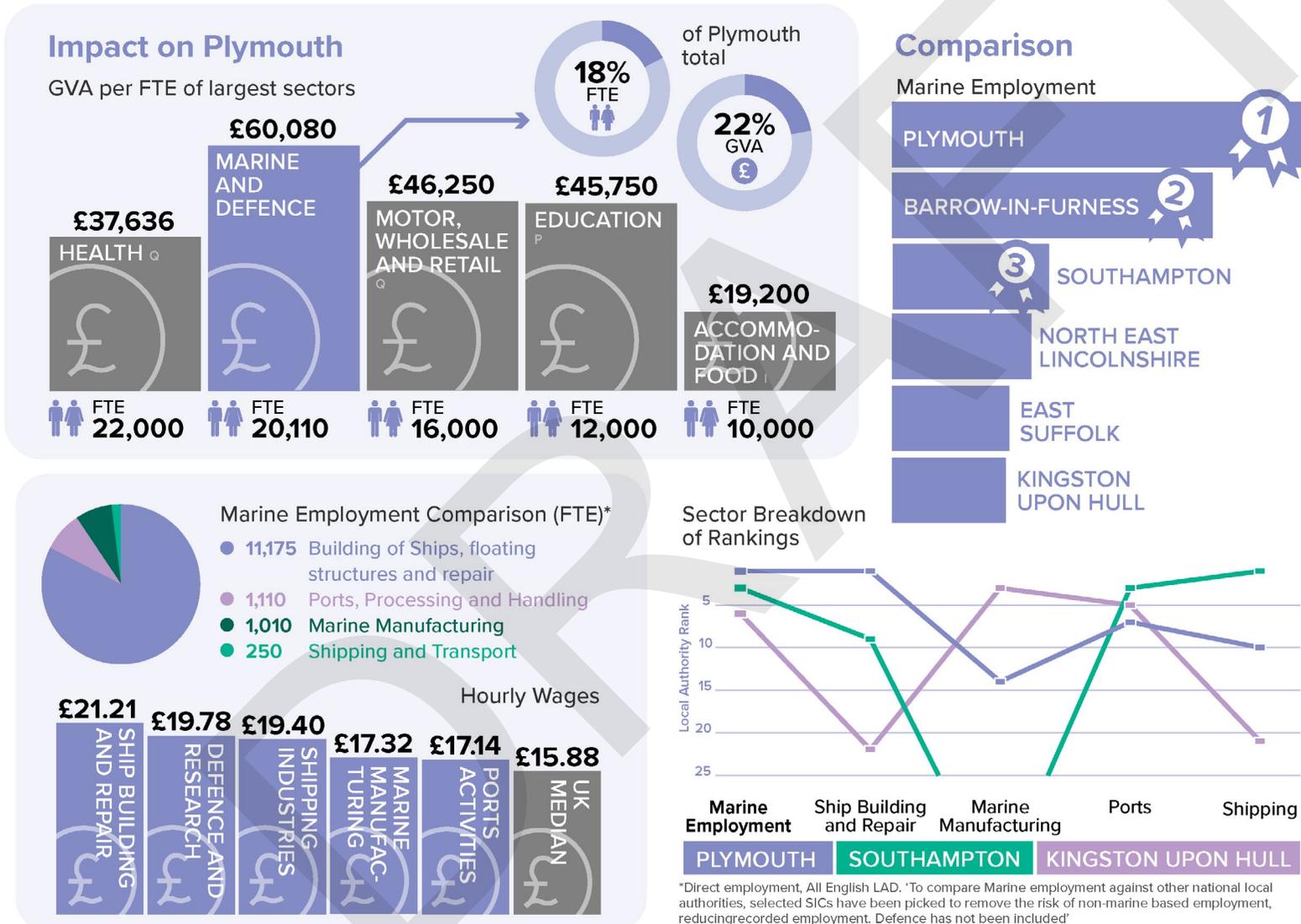


▲ Source: Mott MacDonald

Figure 2.5 Catalyst for Growth

Catalyst for Growth

The Ports are a major employment sector in Plymouth and the highest maritime employer in England, supporting productive and high-wage roles across a wide range of maritime industries.



▲ Source: Mott MacDonald



2.2 Analysis

The Plymouth ports have been analysed from an economic and socioeconomic perspective to understand their strengths, weaknesses, opportunities, and threats. This baseline understanding has developed through a combination of desk study research and stakeholder feedback. The diversity of the port ecosystem means that not all findings are applicable to every geographic area or component part, but there are some recurring themes which help to build a composite picture.

Strengths

Depth and Diversity of Maritime Employment: Plymouth has the highest marine employment of local authorities in England, well-represented across shipping, port services, marine manufacturing, shipbuilding, and repair. This diverse employment base supports a robust local economy and creates an adaptable local market to new opportunities.

A Complimentary Ecosystem: The ports and support businesses form a diverse and complementary ecosystem rather than a highly competitive commercial environment. Relationships between different harbour authorities and port operators are generally amicable and stronger where there are operational benefits.

Strengths in Manufacturing: Vessel manufacture, supply, repair, servicing, and decommissioning are concentrated in Plymouth. These roles typically offer higher than average median wages, sustaining skilled workers and supports local prosperity.



"Plymouth's successes come from its regional maritime hub status, with short sea and ferry traffic, an attractive waterfront for leisure activities and close relationship between defence, commercial and academic organisations"

Maritime Legacy: Plymouth has advantages due to the nautical history and training organisations, either through the University of Plymouth or companies based in Plymouth like SeaRegs.

Devonport: HMNB Devonport is the largest naval base in Western Europe. Investment in UK defence supports both Devonport and businesses in the area, bringing long-term, skilled employment to Plymouth.



Benefits of the Plymouth Sound: The Sound has good natural and physical assets, a natural harbour and sheltered water with deep water access to the English Channel and Atlantic. The Sound is home to the world's first 5G ocean-based marine testbed, used for advanced applied autonomy, smart ports, and environmental monitoring.

Robust Freight Market: Bulk minerals import and export, and importing fuel, remain important backbone cargoes for the ports. China Clay is an important commodity, which is globally recognised for its quality.

Leading on Technology: A robust marine supply chain and skills in autonomous vessels, engineering and the mobilisation of vessels create a draw to Plymouth. This enhances the port's competitive edge and positions the area for future growth

Principal Institutions: There are several leading maritime, research and conservation institutions located in Plymouth, such as the Marine Biological Association, Marine Institute at the University of Plymouth and Plymouth Marine Laboratory. Plymouth hosts the largest number of marine scientists anywhere in the UK.

Leisure and Recreation: Plymouth boasts a growing maritime visitor economy with strong international connections. Key attractions include the Mayflower Steps, Barbican and National Aquarium. Plymouth has a well-established marine leisure sector with around 1,400 gold anchor berths, hosts major sailing events and is a growing cruise destination, with 12 cruise ship bookings in 2023 and a target to increase it to 30.



“The ferry port at Millbay ensures Plymouth operates as an international city. The hosting of international events like Sail GP, and presence of heritage in Sutton Harbour is important to tourism in the area”

Environmental and Cultural Assets: Plymouth has many historical assets with over 750 listed buildings including the Royal Citadel built in late 1660. Plymouth has a wealth of environmental assets, with seven Sites of Special Scientific Interest, numerous areas with conservation designations and two National Landscape areas nearby.



Weaknesses

Vessel Size Restrictions: Vessel size is limited in the Cattewater area and Sutton Harbour due to physical constraints. In the Cattewater area, vessels are limited to a maximum length of 150 metres due to vessel turning, while Sutton Harbour has width restrictions due to double lock gates (12 metres wide), and is constrained by the lock bore that is made of cast concrete. Dredging is essential to prevent silting, which would reduce the working depth of the port. In addition, wharf sizes are insufficient for larger vessels. While Millbay can accept larger vessels, a degree of vessel size restriction still exists, albeit less significant for current operations.

Devonport Primacy: Access to the port is regulated with limited access during Royal Navy ship or submarine movements. Although managed well, this can disrupt commercial operations, with 50-60 moves a year that restrict access for a full tide (12 hours).

Restrictions on Movement: Parts of the port experience restricted water depth during low tide, affecting the ability and windows for larger vessels to navigate. The weather, manoeuvrability of ships and need for skilled tug assistance can also limit the port's operational flexibility.

Working Capacity: All individual ports operate near capacity, although the constraints are different for each. Constraints include wharf length and availability, berths or storage and laydown capacity. Expanding active berths is costly and would require grant funding, as operators cannot fund expansion privately. Quay and laydown space around Plymouth Ports is limited due to other development, with some prime areas having non-marine uses. Much of the land available is "behind the wire" and operated by the MoD, restricting access and the types of business that can utilise the area.

Unified Voice: A lack of a single voice for the ports hinders development ambitions. Collaborative public-private efforts are needed for investment and space, and to advocate on behalf of the ports on the national stage.



"We as both a city and a collection of ports need to act with one voice when it comes to the overall development and lobbying central Government for grant funding and financial aid."

Location Challenges: Plymouth's location in the South West, further away from other urban populations, creates challenges. For freight, there is a perception that Plymouth is too distant for haulage companies, and Portsmouth and Poole have been more successful in increasing freight. Large events may also favour locations closer to London due to faster travel links.



Communication Levels: The ports have developed organically with limited strategic collaboration between constituent elements. While partnerships are growing such as the Tamar Estuaries Consultative Forum, Cruise Ship Partnership etc., not all operators are members and smaller operators can miss out on opportunities. This lack of coordination can hinder overall efficiency. Operators are aware of port activities but vary in communication with other stakeholders. Initiatives like the Freeport have different levels of engagement among operators.

Funding and Viability Challenges: Plymouth's low industrial and office values necessitate grant funding to bridge viability gaps. The issue can be exacerbated on waterfront sites (e.g., Millbay) as they are more likely to have complex below-ground infrastructure or contamination, adding to the challenge and any additional land ownership complexities that arise due to the Duchy of Cornwall ownership.

Blast Zones: There are three major safety hazards in the area which create management requirements at Devonport, Cattewater and the east bank of the Tamar. However, this is typical for port related uses.

Historical Deprivation: Historic deprivation in the UK is typically higher in port areas (73 of 170 LSOA are in the top 30% of deprived places). There are wider issues with low-wage employment, long-term sickness, and high economic inactivity.

Electricity Grid Constraints: There is a lack of shore power in some areas of Plymouth, as the capacity for power is inconsistent, with localised and spatial constraints. This impacts on-site investment in lower carbon technologies, such as cranes and renewable energy generation. Upgrading shore power is expensive and involves the National Grid.



“Poor electricity infrastructure will hold back electrification of marine leisure vehicles and will impede progress toward Net Zero. Upgrades need the right balance between environmental protection, commercial necessities, and cost.”



Opportunities

Employment Growth: Employment areas like the Plymouth and South Devon Freeport, Devonport and Turnchapel bring new investment to Plymouth and can help to leverage private investment. Targeted sectors in marine, technology and defence align with existing strengths and support future economic growth.

Marine Technology: The work of Oceansgate, Marine Business Technology Centre and the Smart Sound has made Plymouth a leader in marine autonomy, robotics and AI. Plymouth has the opportunity to bring together public and private organisations in this space to take advantage of major future growth areas.

Local Training and Maritime Supply: Educating and training locals for maritime roles is crucial. There are several ongoing initiatives, such as the Blue Green Skills initiative, Devonport and Interfish's training support for crew development that are upskilling residents, creating opportunities to reduce unemployment and grow the local area skills.

Defence Investment: Increased investment in UK defence capabilities will support long-term and skilled employment in Devonport, bringing significant opportunity for local training and supporting businesses located in Plymouth.

Floating Offshore Wind: A strong skills base exists to support growing FLOW activities. This could increase testing, part manufacturing and vessel mobilisation, although no Plymouth-specific strategy has been created.



“The emerging floating wind market in the Celtic Sea brings the potential for spin-off services to support operations. This can combine with the Freeport, to attract new businesses into the area”

Cruises: As the number of cruise ships calling at Plymouth grows, there is a potential to increase visits and turnaround calls, generating greater economic impact through visitor stays, increased spending and area recognition. Integration of current attractions would ensure visitors create local benefits, and cruises out of traditional holiday periods can support business during off-peak times.

Green Fuels: Plymouth is well positioned for the growth of clean fuels. There are increased imports of HVO fuels which can act as a bridge to cleaner fuels and the city leads on hydrogen technology with multiple stakeholders investigating hydrogen bunkering, and the Carlton Power facility at Langage. While the demand remains uncertain for hydrogen there are several regulatory trends that will increase the importance of clean fuels. Overall, Plymouth is well-positioned as a leader in sustainable energy for the maritime sector.



Minerals: Growth in the mineral sectors, such as tungsten, would create synergies with the ports. This can diversify and strengthen the local economy by providing jobs at different stages on the supply chain and providing a robust export market in Plymouth.

National Marine Park: The establishment of the National Marine Park has brought funding to Plymouth and enhanced the visitor experience. The park can continue to support leisure opportunities by improving key waterside assets, promoting marketing and engagement activities, and enhancing access to the waterfront for both residents and visitors.

Freight Growth: Although import and export are significant port activities, there is a relatively low total 'over the quay' activities for the length of the operational coastline due to competing uses. Nationally, there is an opportunity to increase shipping freight and take goods off roads, reducing emissions and congestion although this could have a localised impact within Plymouth.





Threats

Freight Competition: With limitations in wharf sizes and the upward trend in ship size, there is a risk of competition from other larger ports like Bristol or Southampton. A lack of container handling facilities limits the type of cargo the port can receive compared to other ports.

Development Conflict: Residential, commercial, and industrial uses are concentrated around the ports. Development has reduced the available commercial land and restricted development around some ports and add pressure on existing infrastructure and transport links. Neighbouring port operations can create conflicts over air quality, noise and views.

Conflict at Sea: The multiple uses can create conflict in the sound, the primacy of Devonport could be a threat of commercial operations, if they require reliable access to port facilities. Limited harbour berths lead to competition between recreational and fishing vessels, which can reduce the future stability of fishing in Plymouth.



“A sensitive approach has to be taken. Any commercial needs of the shipping companies, fish market etc need to consider the other local businesses operating on that site and the tourist appeal.”

Competition for Green Growth: Competition from other ports in the UK and Europe for marine growth areas, such as offshore wind, will require significant investment. There is national competition from larger ports and container ports for future funding and cargo, especially the race to decarbonised infrastructure.

Decarbonisation Challenges: Coordinating infrastructure, understanding the demand for clean fuel, and managing costs are all hurdles. Plymouth's demand for vessels and power is dispersed, therefore it lacks an obvious central investment location. The timing and content of domestic regulation are still uncertain due to the delayed Clean Maritime Plan refresh, which would aid investment timelines.

Network Congestion: There are constraints in the local transport networks which cause congestion. Port-related vehicle movements can exacerbate the problem, especially during peak seasons, leading to issues around Millbay and the A374 which provides a primary connection between Cattewater and the A38. The lack of a rail freight hub or active rail connections exacerbates transport issues, increasing congestion and costs. PCC have plans and business cases for highway improvements which could ease the issues on the A374. However, there has been limited cross checking against potential growth in the ports and their future access needs.

Environmental Constraints: Plymouth Sound and Estuaries Special Area of Conservation can constrain the design of port expansion plans. Localised environmental constraints include the Blue Elvin granite at Sutton Harbour and SSSI.



Changing Freight Types: A high proportion of Cattedwater import is petroleum, which will decrease in the long term. A longer-term decrease in petroleum import could release industrial land, but also there has been an increase in the importance of hydrotreated vegetable oil fuel or alternative fuel sources.

Fishing Sustainability: Sub-optimal or closure of fish market facilities limits the opportunity for local sales and fish to become a larger part of the visitor economy. Landed catch is currently transported to other markets.

Ferry Passengers: There is a slow but steady decline in short sea passenger movements across all routes, due to competition from other modes, from 20.5m nationally in 2012 to 15.1m in 2023. Plymouth routes have not seen the same decline and returned to pre-Covid levels in 2023. Ferry passenger levels impact the local economy and businesses that support accommodation or the onward movement of passengers.





The Case for Intervention

Plymouth Ports are a major economic contributor in the city, the South West and nationally. The diverse variety of functions presents a resilient and productive ecosystem which is greater than the sum of its parts. Plymouth's maritime sector is a cornerstone of its local economy, with significant strengths in engineering, technological innovation and research.

However, the nature of ports is changing worldwide, and Plymouth will need to evolve to maintain and grow their market presence and capabilities. The diversity of the ports necessitates some targeted intervention – a “one size fits all” approach is not appropriate. In some areas, a more strategic approach is needed to overcome port weaknesses and realise the full potential of major opportunities.

There is a clear need to articulate what makes the Plymouth Ports special and align existing strengths with future prospects. To this end, an overall strategic vision has been prepared to provide a ‘distinctly Plymouth’ direction for the future. This was prepared in dialogue with Plymouth City Council to capture a shared vision for the future of the ports.

A summary of the case for intervention is as follows:

- Ports are economically valuable to the city, region and wider UK. In Plymouth marine and defence comprises 20,110 FTEs and £1,214m of GVA (2021).
- Defence at Devonport has historically been a core maritime sector. The Ports are also now used for freight, vessel manufacturing, technology and training.
- The Ports are nearing capacity and face limitations in physical space for future expansion. The potential conflict between uses and coastal regeneration presents a long-term risk to heritage industries.

- ‘Business as usual’ could lead to a decline in port operations. There is competition for national and international ports for growing freight demand and pressure to decarbonise.
- Strategic planning and coordinated investment are needed to maintain the vibrancy and diversity of the ports and to enable future growth.
- There are emerging maritime growth areas in Plymouth in autonomy, alternative fuels, robotics and conservation. These are supported by world-leading institutions.
- There are exciting opportunities and potential growth for Plymouth Ports, supported by a wide range of public and private stakeholders.



Figure 2.6 Economic Impact

Economic Impact

The growth of the maritime industry in Plymouth will support high-productivity employment creating public and private benefits, and catalyse further employment due to maritime multipliers.

Creating Employment

FTE Growth
2021-2030

5,283 FTE
OBR Forecast

8,173 FTE
Local Forecast

32%
Job growth in
marine sectors

21,110
Marine



£60,080
GVA per FTE
(Maritime and Defence, 2021)

£158m
Potential GVA growth from
maritime FTE

Multipliers UK-wide level

Maritime Sector



Shipping



Ports



Leisure Marine



Marine Engineering & Scientific



Employment in specific industries will support wider local employment growth through;
Indirect Jobs - supported in industries that supply inputs to Ports
Induced Jobs - supported by direct and indirect Ports employees through spending wages on goods and services.

Source: Cebr (2022) The economic contribution of the UK Maritime Sector

Supporting Growth in the Marine Sectors

2,600 + **2,800** + **1,400** = **6,800**
Direct FTE Indirect FTE Induced FTE Total FTE

Assuming the new job split follows the current split, growth at a national level

Increasing Productivity

With growth in productivity Plymouth can support:



More Productive Sectors

Greater productivity growth



Benefits of Agglomeration

Matching different type of work to the right employer



Learning and knowledge spillover for similar business



OECD research suggests
+10% Employment Density

+0.9-1% Productivity

Sharing the values of fixed costs





3 Vision for Plymouth Ports

3.1 Vision

Plymouth Ports: A thriving maritime ecosystem within Britain's ocean city

Plymouth is Britain's Ocean City – the sea defines the unique history of the city and has shaped its culture, its heritage, and its people over generations.

The Plymouth Ports will continue as an international maritime hub, honouring centuries of living and working at sea while being industry leaders in marine innovation, maritime autonomy, and vessel engineering.

The ports' unique blend of maritime activities will support a diverse range of skills and jobs fostering inclusive economic growth for local people.

Successful evolution will build upon current strengths, experience and versatility while implementing sustainable changes towards net-zero in operations and infrastructure. This will allow Plymouth to contribute to alternative fuels, short-sea shipping, and floating offshore wind developments in the region.

Devonport has a unique and crucial role in supporting the UK's national defence capability and Plymouth will maximise the benefits of its long-term investment.

The natural and historic environment will be celebrated and protected, supporting Plymouth's status as the first National Marine Park.



4 Supporting Thriving Ports

4.1 The Opportunities for Supporting Thriving Ports

Building on the preceding analysis and vision statement, six opportunities have been identified to support thriving ports in Plymouth.

The opportunities connect to data, themes and research conducted through the baseline work and stakeholder engagement. They represent a focus that will support economic growth and employment opportunities for residents.

These opportunities are partially overlapping, but are considered distinct enough to focus on the benefits of each. Each of these opportunities is explored in the following section, including:

- The potential rewards that these opportunities offer.
- A description of what the high-level requirements are to realise these opportunities.
- Spotlight boxes to describe a key topic or growth areas associated with the opportunity.
- A list of initiatives and projects underway.
- Further ideas to explore which could provide beneficial outcomes and synergies.

Figure 4.1 Opportunities to Support Thriving Ports



▲ Source: Mott MacDonald



4.2 Opportunity 1: Develop Local Skills

The rewards of local skills

Developing local maritime skills can:

- Drive employment in high-wage and productive jobs, creating stable employment in Plymouth.
- Reskill the adult population to re-enter the workforce, reversing trends of economic inactivity.
- Raise living standards and create opportunities for Plymouth residents to stay in the city.

What is required?

1. A wider range of educational programmes catering to different starting points and skill sets, aiding local accessibility and supporting the transition to maritime employment.
2. Working with the Plymouth Employment and Skills Board to engage with employers and training providers and identify relevant training needs in the sector.
3. The city needs to create a 'skills escalator' that embeds lifelong learning to deliver the workforce supply to meet employer need and demand.

How will this support thriving ports?

Thriving ports provide employment opportunities in specialised, high-paying sectors such as water transport, ship, and structure building and specialist manufacturing. Creating jobs in the ports industry has significant multiplier effects, as it supports industries around the ports and stimulates spending in the area, leading to more leisure and recreational services.

Employment in the ports industry requires both specialised and non-specialised training, and the educational programme should reflect this. Maintaining and growing local skills is essential to creating a resilient labour market, that can support new business and emerging maritime growth areas.



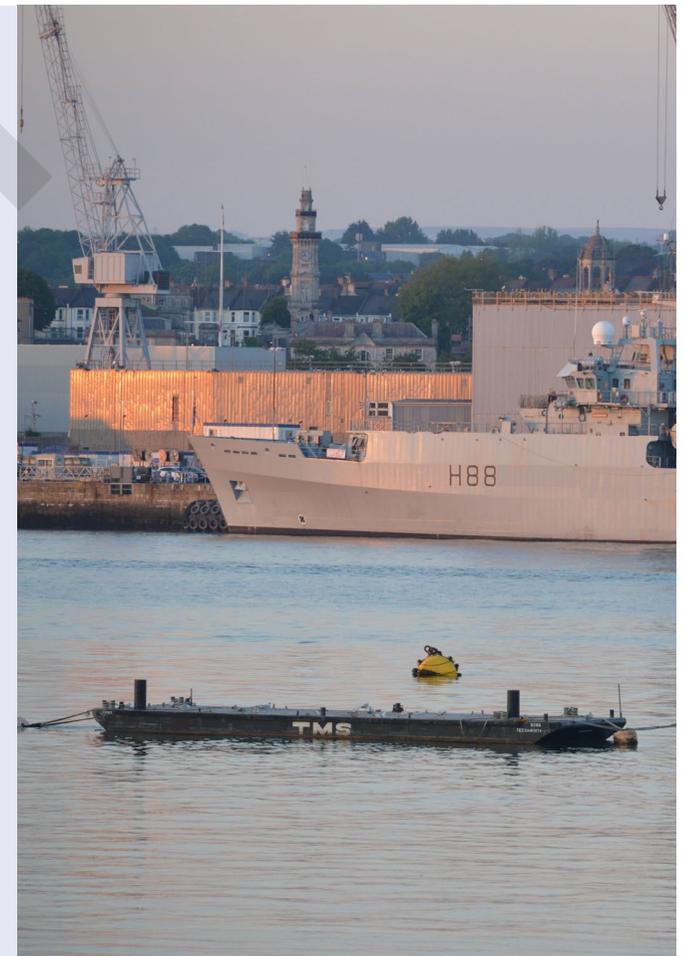
The navy and the dockyard are integral parts of Plymouth's history and current port ecosystem, playing a central role in the development of maritime skills in the area. A large, 'anchor' employer such as Devonport provides a consistent pathway for local residents to enter maritime employment and help maintain a high level of skills in the area. The challenge is to maximise the benefits of Devonport for the local population while minimising the outflow of opportunities outside of Plymouth.

The experience, knowledge and diversity of skills present in Plymouth are identified by businesses as a unique draw to the area and will provide the basis for supporting thriving ports. A diverse range of training, created by understanding the skills that employers will need, will maximise the benefits of this opportunity.

Spotlight on... Devonport

Babcock has secured a £750 million contract to enhance submarine capabilities at the Devonport. The 7,300-person workforce will remain largely stable due to the investment; however, due to an ageing workforce, significant recruitment is planned, supported by an early careers programme and adult upskilling within the City College. This includes:

- A minimum of 100 graduates and 160 apprentices into Babcock's Early Careers programme per annum.
- Continued hiring from the external workforce up to 500 p.a. into permanent roles.
- Introduction of adult upskilling to resourcing of up to 100 per annum including a new Bootcamp model co-designed with City College Plymouth.



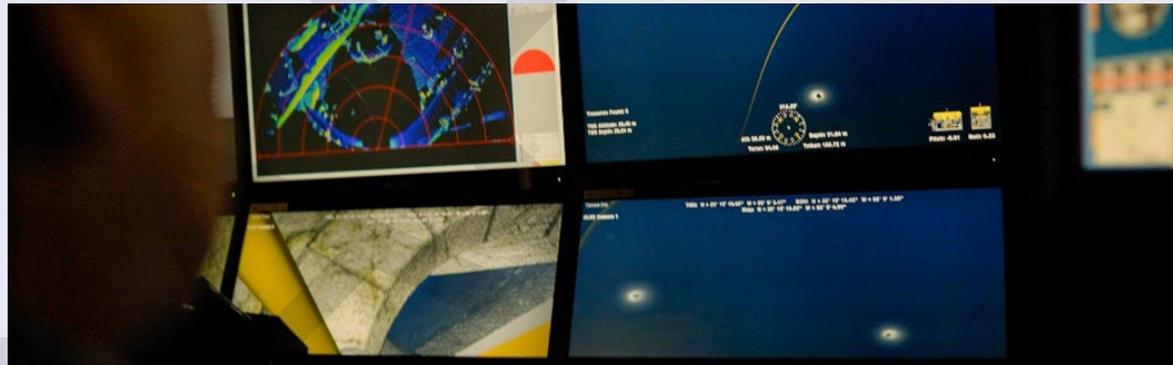


Spotlight on... Skills and Workforce development

Skills and workforce development is a cross-cutting theme of the four pillars in the city's Growth Plan. There is a specific skills commitment and action in each pillar relevant to this strategy:

- Productive Growth and High Value Jobs – ensuring the local training offer meets employer needs in our higher value sectors;
- Inclusive Growth – maintaining and growing our reach and engagement across the city;
- Sustainable Growth – placing the transition to net zero at the heart of economic planning;
- Civic Pride and Regeneration – reinforcing the sense of pride that local people have in their city.

This is shaping a refresh of the Skills 4 Plymouth plan that will also align with this Opportunity, alongside the Local Skills Improvement Plan.



Spotlight on... Maritime Education

Plymouth has a range of educational and research providers, covering higher education, skills plans and specialist marine training.

- Higher Education Providers: 3 universities (Two gold and one silver rated) with more than 23,000 students. The University of Plymouth is home to the Marine Institute which produces world-leading research.
- Further education at City College Plymouth, which includes the Blue-Green Skills Hub which focuses marine and environmental sectors.

- Independent training providers, including Discovery College and members of the Devon and Cornwall Training Provider Network, provide a range of accredited and unaccredited training programmes to meet the needs of local people and employer demand
- Private specialist training providers such as SeaRegs and Fugro Global Training Centre (ROV Course) have benefited from the range of existing skills and coastal locations. Interfish is providing local apprenticeships to train fishing crews.



Initiatives and projects underway and in development

Blue Green Skills Hub: A significant project to create a world-class city centre Blue/Green skills hub educating 2,000 students from Level 1 to Level 6 supporting 16-18 programmes, adult re-skilling, apprenticeships, and higher education. The hub covers a wide range of marine and maritime skills including green energy, associated technologies, green construction and nuclear.

The City Council took a decision to reacquire the Civic Centre from Urban Splash and the Council is currently working with City College Plymouth to explore the potential of locating the Blue Green Skills Hub in the lower ground floors of the Civic Centre.

Skills Launchpad Plymouth: An online and face to face service launched in 2020 to support local people and connect businesses with local opportunities in skills, training, education, careers and jobs. Over 50,000 people have received support since the launch. This is complemented by the Sector Skills Partnerships linking people with vacancies in: construction, health and social care and the visitor economy.

Lifelong Learning: Funding from the Adult Education Budget supports adult learners across the city, delivered by City College Plymouth and On Course South West alongside commissioned sub-contractors. On Course South West, for example, has supported over 5,000 adult learners.

Further ideas to explore

Monitor Devonport: Pro-active engagement with Devonport at a senior level and maintain relationships to maximise benefits for Plymouth. This could include maintaining links between the University, city college and local schools during the Babcock training or ensuring the local supply chains are used when available.

Ports Skills Review: Continued engagement with port operators and Plymouth stakeholders to identify upcoming skills gaps, either due to an ageing workforce or changing demand. Where the operators do not have their training programme or have been struggling to fill gaps in their workforce these would be identified as skills gaps and feed back into initiatives similar to the Skills 4 Plymouth Plan.

A skills escalator: Incorporate lifelong learning to ensure an adequate supply of workforce to meet the needs and demands of employers. This system could complement the skills review process to guarantee that existing programs are equipping workers with the necessary quantity and quality of skills required by employers.



4.3 Opportunity 2: Maintain Plymouth's Expertise and Innovation

The rewards of maintaining Plymouth's expertise and innovation

Maintaining Plymouth's expertise and innovation can:

- Create high value roles within Plymouth, a city with multiple innovation sectors.
- Support onward employment in the region, to create a regional technology hub and draw in investment.
- Strengthen links and visibility of leading institution locations in Plymouth.

What is required?

1. Enable quality working space to develop in key waterside locations, which have historically helped to drive maritime innovation.
2. Continue to raise the profile of Plymouth's innovation by connecting institutions and stakeholders across multiple projects and sectors.
3. Create new and incorporate changes in the regulatory environment in innovative industries, such as maritime autonomy.

How will this support thriving ports?

Plymouth has a growing reputation for science and innovation, with strengths in health, manufacturing, and defence. Developments in Plymouth over the past decade such as Smart Sound Plymouth and the innovation support service have created three leading areas of excellence: marine autonomy, clean propulsion and digital ocean technology.

Incorporating technological expertise and innovation within Plymouth Ports helps to further diversify employment beyond the traditional port industries. This creates resilience to shocks in demand and technology and innovation can create synergies with other activities such as freight, fishing, defence and conservation.

High tech jobs associated with innovation have the potential for large place-based employment multipliers. For every one job created in this sector it is estimated that an additional 1.9 jobs can be created in the local area, potentially supporting a supply chain throughout Plymouth.

Creating the right employment space for technology and innovation can help grow existing businesses and attract new entrepreneurs. There is strong demand in Plymouth, as evidenced by the commercial portfolio owned and managed by the council. The Freeport can help support the ports by increasing the number of jobs in the area through the regeneration of South Yard, growing existing businesses through tax breaks, and supporting a wider volume of business and imports due to the low tariffs on goods.



Spotlight on... Autonomy

Maritime autonomy (data analytics, artificial intelligence, sensor technology and robotics) is a major emerging technology trend predicted to create a £103 billion market by 2030, with the South West the centre of the UK market.

Plymouth has a growing and nationally recognised cluster in marine autonomy and marine artificial intelligence around navigation systems. Plymouth is home to the Future Autonomous at Sea Technologies (FAST) Cluster, including Thales' Maritime Autonomy Centre and the University of Plymouth Autonomous Marine Systems (AMS) Research Group. The Plymouth Marine Laboratory is also leading in this sector, launching a first-of-its-kind Autonomous Data Buoy into the Sound in 2021.

Spotlight on... The Plymouth and South Devon Freeport

The Plymouth and South Devon Freeport is comprised of three core freeport sites. One of these, South Yard, is adjacent to the existing Oceansgate Enterprise Zone. This site will focus on marine and defence sectors, attract start-ups, SMEs with growth plans and new areas of development from larger companies. An early success story is the production of Jackal 3 in South Yard.

The Innovation Service at the Freeport which is currently in development would help increase the visibility of Plymouth by bringing together large, end users of technology with the developers of innovations to align market needs with opportunities within the Freeport.

The Freeport aims to create 3,584 additional jobs and provide a step forward in hydrogen, with a Green Hydrogen Electrolyser being developed by Carlton Power at a second site in Langleigh.



Initiatives and projects underway and in development

Oceansgate: Oceansgate occupies a 35-hectare site and has been a key regeneration site since 2016, providing phased delivery of office and industrial space. Oceansgate 3.1 will feature Innovation “Barns”, large industrial units while will supporting innovation within the Freeport South Yard tax site.

Plymouth and South Devon Freeport

Innovation Service: Innovation service funding will support a dedicated lead for this activity within the Freeport team and will also support fractional posts (knowledge exchange managers) within the University of Exeter and the University of Plymouth.

Ocean Futures: The organisation aims to bring together public and private partners, drawing on an ecosystem of SMEs and micros alongside assets from across the South West. In Plymouth this includes the Marine Biological Association, Oceansgate, Plymouth Marine Laboratory, PASD Freeport, University of Plymouth Marine Institute, QinetiQ and Thales.

Maritime Regulatory Innovation Framework

(MRIF): Led by Plymouth City Council, in partnership with the Maritime and Coastguard Agency, University of Exeter, University of Plymouth and Plymouth Marine Laboratory. Through innovation and collaboration, the project will deliver a brand new set of regulations that will define a new class of prototype vessel. The regulations will be road tested on real vessels with a range of stakeholders and put the UK in the leading role as an international centre for maritime zero emissions and autonomous vessel innovation and manufacturing.

University-led Initiatives: The University of Plymouth has been involved in several other significant initiatives: The Zero Emission Network of Workboats (£5.4m), Supergen Offshore Renewable Energy Impact Hub (£3.4m), The Electric Seaway project (£3.2m) and the Maritime Launchpad Partnership.

Further ideas to explore

Autonomous vessel centre of excellence:

Turnchapel Wharf is already recognised nationally as a centre of excellence for training and autonomy. The development and growth of an autonomous vessel centre of excellence could bring together commercial activities in Plymouth and link to potential uses in the defence sector as a driver of future economic growth. This could be a physical cluster or people network. The centre could support close engagement with the University of Plymouth, utilising their expertise and research in the area. It could also include external marketing of Plymouth’s capabilities.



4.4 Opportunity 3: Invest in Infrastructure

The rewards of improving port infrastructure

Investing in infrastructure can:

- Deliver employment in industries like freight and fishing that are a core part of local culture and provide routes into employment.
- Strengthen freight activity, which can create synergies with the ongoing development of the port.
- Enable the movement of a wider range of goods, creating new markets in Plymouth and resilience against changing trends.

What is required?

1. Ensure the wharfs and berths are of sufficient quality and support multipurpose uses.
2. Identify and preserve sufficient hinterland space to support storage and processing.
3. Understand the funding landscape and direct operators towards funding opportunities as they arise.

How will this support thriving ports?

The findings from stakeholder engagement and baseline review have consistently shown there is potential for growth within Plymouth Ports. Many port areas are working at capacity and have invested in a series of lower-cost interventions to increase capacity, such as new loading facilities, storage, shore power and wharf maintenance.

The next stage of growth would require a larger intervention, due to a series of spatial and funding constraints within the ports area. This includes the size, length and weight capacity of wharfs, as well as port operational areas required for processing, storage and any associated maintenance and engineering works. Investing in infrastructure will support the modernisation of the ports and mean it will not lose ground on local competition and larger national ports in Bristol and Portsmouth. With the level of freight expected to increase, there is an opportunity for growth in Plymouth.

Investment in infrastructure can support the ports by efficiently using all the space available, helping to avoid some of the ongoing competition for space at the ports. New infrastructure can also be designed flexibly for different types of goods or developing sectors, to create new direct and indirect employment opportunities at the ports whilst increasing the overall resiliency of Plymouth to changing external trends.

Integration of wider infrastructure requirements would allow for complimentary investment, or the potential for dual uses. There are further challenges around the ports in connectivity, flood defence and drainage infrastructure, as the Port functions as part of the Critical Drainage Area. Long-term challenges include increasing coastal flood risk in some low-lying coastal areas.



Initiatives and projects underway and in development

Dredging study: An investigation is being conducted to widen the area in Cattewater, dredging it to a depth of 5 metres to accommodate larger vessels for navigation. Additionally, there have been investigations to dredge specific areas in Sutton Harbour (e.g. Sheppard's Wharf area) to create more mixed-use deep water berths and increase the overall available berthing area.

Millbay Freight: Over £7.3m of public and private funding to enhance freight capability at the port by replacement of the Western Wharf and introduction of new fenders. Delivery of the improvements will be led by ABP as part of wider investments outlined in Section 4.7 that will improve freight turnaround and meet the Freeport's export and net zero ambitions.

Cattewater Feasibility Study: A feasibility study for unused space in Cattewater focused on the space adjacent to Victoria Wharf, with the intention of providing additional berthing and cargo storage. The will include site investigation works to better understand development constraints.

Spotlight on... Freight Demand

The Department for Transport UK port freight traffic forecasts (2019) estimated a long-term growth in freight tonnage – 39% higher in 2050 compared to 2016. The rise is due to an overall increase in goods and because shipping, has the lowest carbon per kilometre of freight. The South West Freight Strategy states:

The decarbonisation agenda is driving a mode shift away from long distance road haulage and towards the use of coastal shipping for carrying bulk materials domestically.

Currently, 77% of domestic freight is moved by road. However, this has disadvantages, especially in the South West due to pollution, congestion (due to the limited route choice) and challenges recruiting and retaining HGV drivers. A modal shift to vessel freight would increase demand, and has policy support from the Plymouth & South West Devon Joint Local Plan:

Supports the expansion of port activities in Plymouth with modernised and accessible port infrastructure and safeguarding the existing port infrastructure. (Policy SPT8)





(Continued)

Turnchapel Wharf: Turnchapel has ongoing initiatives, including the possibility of installing a large test tank for testing autonomous and remote-controlled vessels and investing in a hydrogen bunkering facility.

Pomphlett Jetty: RIG is looking to develop Pomphlett to recycle dredging and mining waste with the clean aggregate sold back to the construction sector. A potential £30m investment to create a multi-modal port facility, which will increase port capacity for heavy bulk cargo, including modern container loading and unloading facilities and create a new mineral process plant.

Transport Improvements: Marsh Mills (A374) Business Case is in development including the removal of a low bridge on Embankment Road which currently restricts movement of high sided vehicles to and from Cattewater.

Further ideas to explore

Demand Assessments: Development assessments for discrete growth opportunities, such as increasing local export of clay and tungsten, container port feasibility, hydrogen and green fuels acceleration, hydrogen bunkering or development of a test tank for autonomous vehicles. Assessments would identify requirements such as proximity to the quayside, depth requirements and supporting land infrastructure (shore power, HGV access, blast zones etc.), leading to common, “no regrets” infrastructure investments that support a range of operators and businesses.

Funding Support: Following on from the demand assessments, or through alternative stakeholder engagement a long list of infrastructure options would form. Support could then take different forms but should support further phases of work to enable a meaningful step forward. Support to aid in the delivery of works could include business case development or more development options to provide connection with potential public funding options. The Crown Estates is a major landowner in the area and one potential funding route due to increased investment activity.



4.5 Opportunity 4: Preserve Space for Ports

The rewards of preserving space

Clear spatial planning can:

- Strengthen the planning and policy standing of the ports to set them up for future success.
- Create growth by identifying opportunities in port areas and building confidence for investment in these new spaces.
- Reduce conflicts between uses to enable longer-term planning and more unified directions in the area.

What is required?

1. A supportive policy environment and spatial plan which balances the constraints and opportunities of different land uses.
2. Localised masterplan resolution of 'hot spots' with competing demand for uses, such as port operations, housing regeneration and public access to the waterfront.
3. Identification of underused land that could better serve the ports and optimal placement of council tenants to serve the maritime economy.

How will this support thriving ports?

A Port Planning Study would benefit a wide range of port operators and stakeholders by providing greater confidence in the allocation of land and marine areas. Key to this exercise is building a common understanding of which port-related areas will be maintained, repurposed, or expanded.

Creating confidence for investors will be a result of clear policy and spatial planning and avoiding ongoing uncertainty around potential restrictions for sites. Presenting the spatial understanding will enable private operators to make informed decisions on growth and minimise the burden on the development management process.

Understanding future port demand in more detail will inform spatial requirements, such as additional commercial land, freight vehicle access and other infrastructure. Demand will be a composite picture of different growth areas, such as high-tech innovations, floating offshore wind, and short-sea shipping. There are also likely to be changes in demand for bulk cargo, passenger and leisure vessels and fishing.

By testing spatial scenarios and their outcomes, a clearer set of priorities could be developed to reach an acceptable compromise and benefit multiple stakeholders.



Spotlight on... planning policy

The Plymouth & South West Devon Joint Local Plan 2014-2034 was adopted in 2019 and reviewed in March 2024. This includes several policies which relate to the port, including the Devonport Naval Base and Plymouth's waterfront.

Safeguarding the port functions and the area's key role in providing key infrastructure and land to support the priority marine employment sector, particularly for those sites with deep water berths. This will include defence, port, fishing, marine industries and research, and marine recreation (Policy PLY20)

Plymouth City Council continue to develop evidence which will support the future Local Plan.

The Marine Management Organisation (MMO) is responsible for the marine plan of the south west inshore and south west offshore. The latest plans were published in June 2021.

Initiatives and projects underway and in development

Cattewater Masterplan led by the Cattewater Harbour Commissioners, is developing spatial concepts for the future of the area surrounding the Cattewater. the future of their port areas. This includes findings from stakeholder engagement and studies into future economic trends, to provide an understanding of the opportunities and constraints over the next 25 years.

Fish Market Feasibility Study is underway involving the Plymouth Fishing & Seafood Association, Sutton Harbour Group and Plymouth City Council, working together to fully understand the viability of operating a fish market in Plymouth.

Further ideas to explore

A Ports Planning Study could be considered to provide a greater level of detail for terrestrial areas than the Local Plan. Targeted scenario testing could help to understand trade-offs and build consensus between different stakeholders, including the council, port operators, landowners and developers.

Digital Data could be collated and made available, such as via Plymouth's Open Data website platform. This could include survey information and key marine asset information. A visual and spatial understanding of the interface between terrestrial land and the marine environment could benefit multiple stakeholders.



4.6 Opportunity 5: Foster Communication and Collaboration

The rewards of communication and collaboration

Communication and Collaboration can:

- Efficiently target opportunities with the ports, to increase investment and create growth,
- Reduce the long-term conflict between different uses by making early decisions in conflict areas.
- Increase the visibility of the ports, improving internal understanding in Plymouth and improving external marketing.

What is required?

1. Continued activity by Plymouth City Council as facilitator and advocate for the city at a regional and national level.
2. Key individuals who champion the role of the ports, build people networks and act as a signpost for collaborative relationships.
3. Forums and groups in which stakeholders can meet to share knowledge, experience and opportunities, such as active investment opportunities.

How will this support thriving ports?

The Plymouth Ports thrive due to the diverse range of uses, which provide a resilient and unique port economy. These uses, while often being complimentary, can create risk of missed opportunities or conflicts without clear communication. Different organisations will have overlap in their growth plans and future prospects, and the congested port area is well understood.

Strengthening communication and collaboration would benefit a wider range of port operators and stakeholders by providing opportunities to work together and access expertise, including knowledge within Plymouth City Council. Creating a clear understanding of the role of wider initiatives, such as the Plymouth and South Devon Freeport and Crown Estates SME Accelerator, would benefit some operators who aren't currently engaged. The council has a role to play in promoting the ports to other public bodies, such as in regional transport plans, environmental plans and national infrastructure

planning for modal shift. A strong network who can clearly articulate the economic benefits and potential of the ports will help to make the case for investment.

An active network of forums and port interest groups can provide clear entry points and invitation for smaller businesses and stakeholders to contribute to the future of the ports. The council can continue engagement with stakeholders and groups to disseminate information, such as the forthcoming £1.8bn ports investment in the Green Prosperity Plan and changes to policy. From the engagement in this study, there is a large stakeholder appetite to strengthen joint working on future growth opportunities.



Spotlight on...Working Together

Tamar Estuaries Consultative Forum

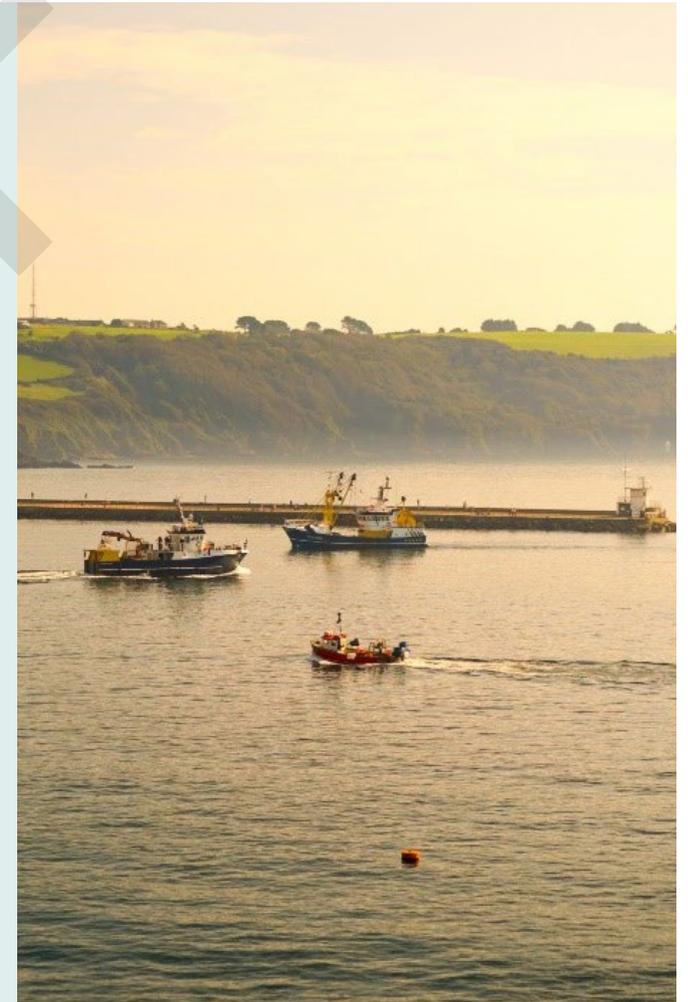
The Tamar Estuaries Consultative Forum (TECF) is a collaborative partnership that brings together local stakeholders and Plymouth Council. They meet three times a year to manage the Plymouth Sound & Tamar Estuaries Marine Protected Area. The role of TECF includes:

- **Sustainable Management:** TECF ensures the sustainable management of the Plymouth Sound and Tamar Estuaries, balancing environmental protection with commercial, defence, and recreational.
- **Partnership and Collaboration:** The forum includes relevant authorities, working in partnership to address issues affecting the marine environment.
- **Advisory Role:** TECF provides a platform for discussing activities, incidents, and developments that may impact the marine environment. They meet to review progress and ensure a holistic management approach.

Cruise partnership

There is an existing 'cruise partnership' comprising Associated British Ports, Cattewater Harbour, King's Harbour Master, Plymouth City Council, two Business improvement districts and is led by Destination Plymouth.

The partnership jointly funds cruise development activity, a business development manager, proactively markets to the cruise sector, raises profile nationally and lobbies via Cruise Britain. In addition, the partnership works collaboratively to provide a great port welcome working with cruise volunteer and engages with local businesses.





Initiatives and projects underway and in development

Technology and Innovation Groups: There are several existing groups. Although the Marine Business Technology Centre is now closed, the FAST Cluster and Oceans Future are active examples.

Marine, Defence and FLOW Factsheets: Factsheets prepared by Plymouth Enterprise and Investment team, presenting key facts and organisations in each sector.



Hosting Events: The council have organised events to increase collaboration between businesses and market the local skills and experience. The city's second Floating Offshore Wind took place in 2024 to outline potential opportunities for Plymouth business.

Embedding Ports within the Brand Narrative: Work is being taken by Plymouth to refresh the city brand narrative, and the ports will play a crucial role in this story, conducting specific perception research and developing a new brand narrative and creative content, which will be featured on the updated 'Britain's Ocean City' website. This platform will include sections on visits and links to key components of Plymouth's offering. The inclusion of ports in this section is an opportunity to align the narrative and consider how they can be represented on the new brand-led platform.

Further ideas to explore

Create Promotional Material: Building on the factsheets, new brochures or pages in the Plymouth City Council website which showcase the breadth and depth of port activities and their contribution. This could include profiles and stories of success and key information on port assets for prospective developers and tenants. There are also opportunities for joint working to promote work being undertaken by Brittany Ferries to decarbonise their fleet.

Targeted Training Sessions: Targeted sessions or programmes where Plymouth City Council are knowledge owners. These could aid smaller operators, and those with less experience in public sector business cases and grant funding, development and planning, and planning for the effects of climate change

Nominate Port Champions: Create a small network of 'port champions', including individuals within PCC Economic Development to pursue the vision and opportunities in this strategy and maintain active engagement within the port community.



4.7 Opportunity 6: Prepare for Net Zero

The rewards of preparing for Net Zero

Preparing for Net Zero can:

- Position the ports to take advantage of employment opportunities in FLOW and Green Shipping.
- Maximise readiness for grant funding opportunities.
- Ensure that the port is ahead of any net zero regulations, to avoid any disruptions to activities.

What is required?

1. An informed direction of the role Plymouth can play in FLOW, and where these will be met.
2. A pipeline of potential projects/interventions, to allow rapid development of business cases when funding opportunities are announced.
3. An understanding for future regulation for all operators, and a direction of travel to meet these.

How will this support thriving ports?

Preparing for net zero ports does not have a clear intervention pathway, as there is significant uncertainty in the timeline, regulations and the definition of a net zero port. However, it helps to distinguish between the decarbonisation of port sites and operations and the wider role in national decarbonisation.

At a port level, operators need to reduce their dependency on fossil fuels for equipment, buildings and vessels. For example, shore power enables the charging of small, electric vessels and supplies power to larger ones when docked to reduce engine use and emissions. Electric vessels may not be suitable for all industries with several alternative fuels such as LNG, HVO and hydrogen. Support for this transition will require storage sites and a clear plan for phasing. Port sites also include buildings, provision for road vehicles, cranes and mechanical equipment which all will

require site-specific decarbonisation measures, transitioning port operations in general to sustainable forms of power or propulsion.

Considering the wider economy and drive for net zero, ports represent a wider opportunity to reduce carbon from goods movement. Short sea shipping and green shipping corridors could move regional and international cargo flows from road to sea, reducing congestion and emissions. In addition, ports have a significant role to play in the wider energy transition, such as FLOW. While there is some uncertainty in the role Plymouth can play, it has strengths that map well into the requirements of FLOW; deep-water anchorage, existing employment in technology and autonomy, manufacturing of smaller parts, as well as historical strength vessel maintenance and mobilization which could create a hub for support vessels.



Spotlight on... Net Zero Regulation

Recent regulation provides an overview of potential future changes, although there are no certain domestic targets. The 2023 International Maritime Organisation strategy expects:

A gradual reduction of international shipping emissions. At least 40% by 2030, 70% by 2040 and net-zero GHG emissions from international shipping by 2050.

The UK's 2021 Transport Decarbonisation Plan stated:

Government's position to a commitment to move maritime to net zero "as soon as we can"; that Plan suggested that "such a transition may be possible in the 2040s"

The 2019 Clean Maritime Plan was the UK's first pathway towards net zero, and planning for a:

...move towards net zero through energy efficiency and innovation, with significant technological change from 2025 to 2035.

Currently, domestic shipping does not have an emissions target, and there is a lack of clarity over maritime net zero regulation. This may be clarified by a refreshed Clean Maritime Plan, currently being produced by the Department for Transport.



Spotlight on... Floating Offshore Wind

Floating offshore wind (FLOW) represents a significant growth opportunity for UK ports and the wider economy, with ORE Catapult estimating that the industry has the potential to deliver £43.6bn in UK gross value add (GVA) by 2050, creating more than 29,000 jobs in the process.

The main regional focus for FLOW is the Celtic Sea. A Regen study into FLOW concluded that:

"There are evidently significant port capabilities in Plymouth, and it could be a good location to support the fabrication and manufacturing of FLOW components, as well its potential as a dock for FLOW vessels. The role of Plymouth could expand further if FLOW projects are developed off the south coast and in the western approaches to the English Channel"

The University of Plymouth is actively involved, partnering to create the Cornwall Floating Offshore Wind Accelerator.



Initiatives and projects underway and in development

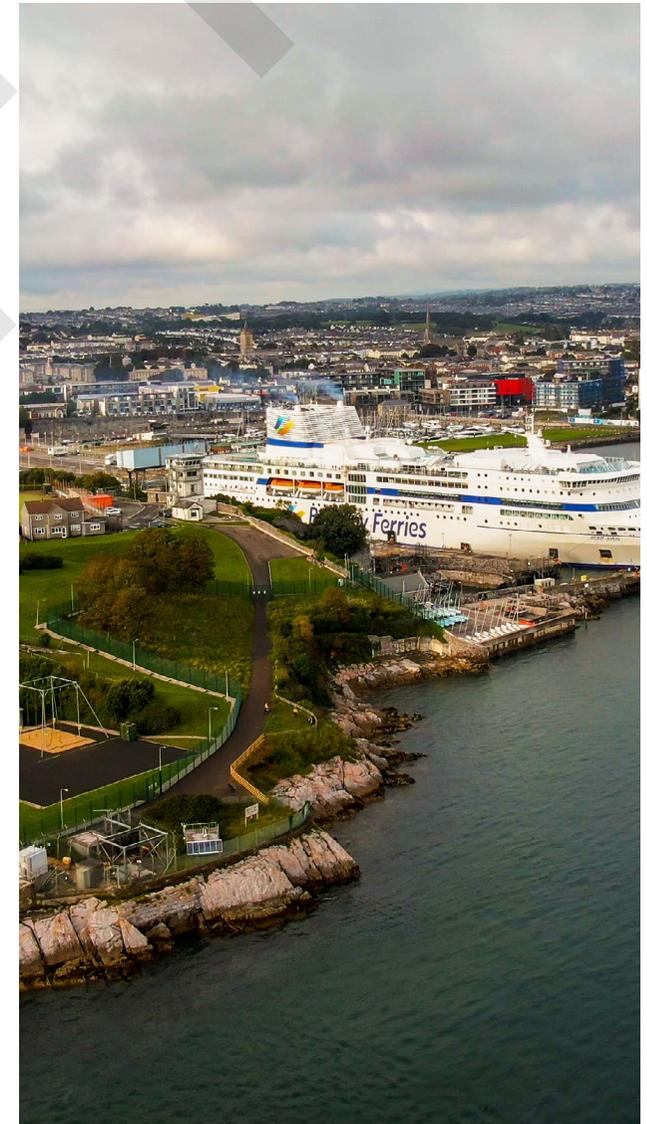
Millbay Modernisation and Net Zero: Over £23m of investment with both public and private funding to improve traffic management (more efficient disembarking and reduced processing times for freight), more check-in booths, and better passenger access. Additional investment is being sought to support the installation of shore power to move towards Net Zero.

Plymouth Sound National Marine Park led by Plymouth City Council, has £11.6m from the National Lottery Heritage Fund, part of which is being used to create a Digital Marine Park. This is planned to be a 'digital twin', which will provide insight into the heritage and nature of the area.

Further ideas to explore

Detailed ports decarbonisation study: Work with groups such as Maritime UK, to understand how scalable decarbonisation strategies can be achieved at port operator level. Due to the structure of Plymouth Ports, there is no single large operator/harbour authority that can both invest significant capital and have a large enough number of vessels to service (aside from Devonport). Options within Plymouth therefore need to be scalable or shared between operators to ensure sufficient demand.

Establish a green shipping corridor: Consider the potential feasibility and merits of a green shipping corridor for Plymouth, focussed on specific routes and close collaboration. This could create the case for a business case similar to Clean Tyne.

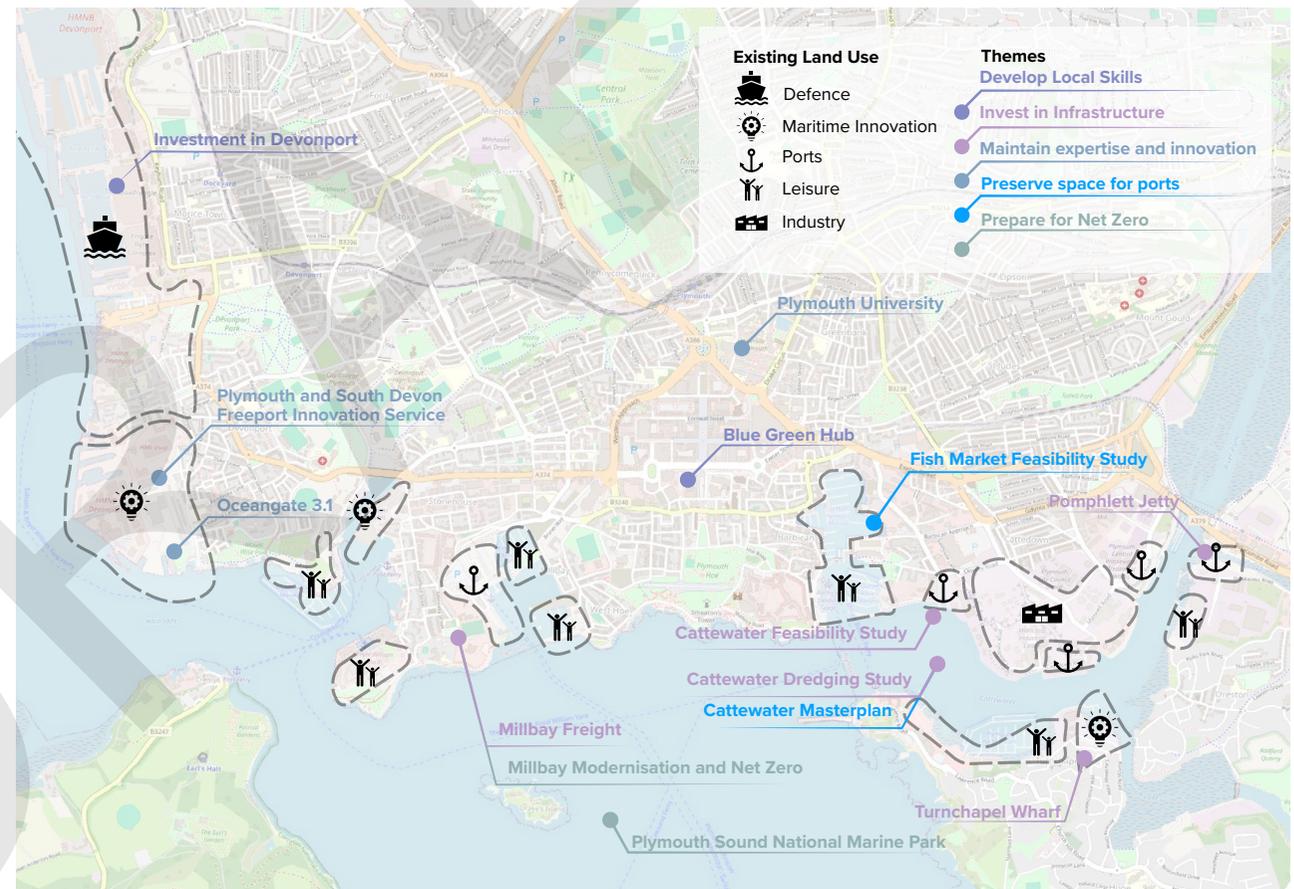




4.8 A Thriving Maritime Ecosystem

The graphic adjacent is an illustrative, spatial representation of Plymouth Ports and the initiatives underway and in development. This is intentionally conceptual, to show the diversity and breadth of opportunities in the area. It does not represent a masterplan or any statutory allocation of land use.

Figure 4.2 Plymouth Ports Underway Initiatives



▲ Source: Mott MacDonald | Map data from OpenStreetMap



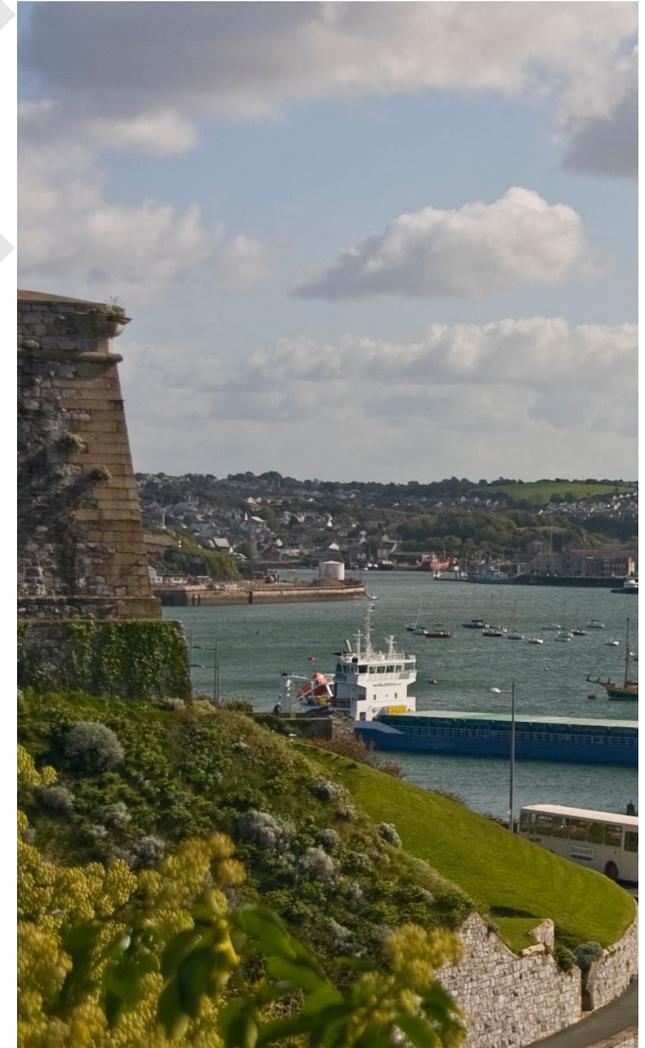
5 Conclusion

The Plymouth Ports are a thriving maritime ecosystem within Britain's ocean city. When considered together, the ports are a major economic contributor in the city, the South West and nationally. They are diverse and productive, with major strengths in engineering, technological innovation and research. Marine and defence in Plymouth employs 20,110 full-time equivalent people and contributed £1.2bn of gross-value added in 2021.

However, the nature of ports is changing worldwide, and Plymouth will need to evolve to maintain and grow their market presence and capabilities. The diversity of the ports necessitates some targeted intervention – a “one size fits all” approach is not appropriate. In some areas, a more strategic approach is needed to overcome port weaknesses and realise the full potential of major opportunities.

This Plymouth Ports Strategy sets out a vision for the future which is ‘distinctly Plymouth’ and articulates what makes the Plymouth Ports special. It also identifies opportunities to support thriving ports and initiatives to maximise their benefits.

The future success of Plymouth Ports will be defined by its ability to maintain its unique blend of maritime activities, support a diverse range of skills and jobs, celebrate and protect its environment while implementing sustainable changes towards net zero. This will be achieved through collaboration and innovation, as Plymouth has demonstrated over generations.



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MOTT
MACDONALD

M

DRAFT