

## **Purpose of report**

The purpose of the following report is to provide an update to the scrutiny committee on the 'Opportunity' areas identified within the Plymouth Ports Strategy document launched in March 2025.

A link to the report is provided here for reference.

### **PPS-MMD-XX-XX-T-X-003 Plymouth Ports Strategy P06.pdf**

The activity described below has been delivered by a host of individuals, organisations and groups from across the city.

## **Introduction**

The Plymouth Port Strategy was commissioned by Plymouth City Council to understand the ecosystem of the ports and identify opportunities to maximise the future economic contributions of Plymouth's harbours to the city, support the transition to net zero and create green jobs.

This Strategy is positioned under the Plymouth Economic Strategy (PES). The importance of Ports was highlighted in both the PES and its associated delivery plan; primarily culminating in the designation of the Maritime and Waterfront investable theme which was created to ensure continued focus on the city's strength in the marine and ports sector. Building on this PES work, Mott McDonald was commissioned to build a more detailed evidence base and plan to ensure the full potential of port is capitalised on most effectively.

Mott McDonald adopted a five step methodology for conducting the study and producing the strategy as outlined below;

1. Stakeholder engagement – undertook structured conversations with public and private stakeholders
2. Ports Baseline – created a socio-economic baseline of information for Plymouth and the Ports
3. Information analysis – conducted a SWOT analysis of the baseline info
4. Vision – developed a strategic vision
5. Opportunity mapping – identify a series of opportunities to implement the vision

The report found that the combined Ports of Plymouth present a complex and diverse ecosystem comprising multiple public, and privately operated ports, wharves and harbours each with a host of users and uses including leisure, national defence, commercial cargo movements, international ferries and innovative marine businesses sites. As such the 'Opportunities' identified by the consultants in Step 5 of their methodology focused not entirely on direct delivery but more so on identifying ways in which the council can act as a convener, coordinator and facilitator.

The strategy identifies the primary strength of Plymouth's port as the diverse inputs of the maritime sector in the city. The Ports underpin a marine and defence sector which employs roughly 20,000 FTEs, representing 18% of the Plymouth workforce

and 18% of the GVA of the City. Whilst HMS Devonport underpins the economic contribution of the ports and the marine sector to the city there is also a significant and diverse leisure sector, vessel manufacturing and servicing and freight operations. Plymouth is also leading on development of marine technology, manufacturing and engineering. Continued enhancement and growth in these sectors greatly enhance Plymouth's competitive edge in sectors with high growth potential such as autonomous vessels, Floating Offshore Wind and alternative fuels.

The following section reviews each of the identified opportunities within the report and against each provides some narrative on progress made to date in moving these opportunities forward. Not all of this activity is directly delivered by PCC, however, it is clear to see that the Local Authority is involved in each of the activities in some way.

### **Progress and update on activity to date**

#### **1. Develop Local Skills**

The city continues to support the development of local skills and specifically within blue / green disciplines. PCC is directly supporting and working with City College Plymouth to bring forward its planned Blue / Green Skills hub on the lower floors of the Civic Centre Building. It is expected this facility, in the centre of the city and in arguably one of the city's most iconic and recognisable buildings, will train thousands of young people and retrain careers transitioners in sustainable technologies and marine innovation. This builds on the incredible work already being delivered in the Centre of Higher Technical Innovation and Maritime Skills building strategically located in the Oceansgate Development in Devonport.

More broadly, Maritime UK South West, has recently produced a maritime careers focused magazine which highlights the various career opportunities within the maritime industries across the South West. Raising awareness of the local opportunities will enable the city to retain its talented individuals to support growth to happen, this is particularly important at this juncture where we have a forecast deficit in labour force to jobs across the city in the region of 25,000 in the next 10 years.

#### **2. Maintain & Leverage Plymouth's Expertise and Innovation**

The city was named the National Centre for Marine Autonomy in June 2025 recognising the strength and depth of the knowledge base and commercial expertise that exists in the city. The interest in marine autonomy has rocketed in recent years as the technology shifts from providing novel use cases to hard and real applications across numerous markets.

Plymouth and South Devon Freeport, Plymouth City Council and Ministry of Housing, Communities and Local Government recently commissioned a piece of research that investigated the opportunities, barriers and recommendations around Marine Autonomy. Recognising that Plymouth is uniquely positioned to offer a blend

of expertise, infrastructure and strategic location to key defence and academic institutions, the research not only highlights the significant opportunities presented by the future development of marine autonomy, but also speaks to how best to address the potential barriers that could restrict the full realisation of this sectors growth. The research highlights that barriers (such as regulation, funding and skills shortages) are reflected both on regional and national scales and it is important that Plymouth continue to develop and leverage its expertise in this sectors in order to maintain its position at the forefront of marine autonomy development. Many of the recommendations proposed in this research have been incorporated into various projects throughout the city focused on advancing the city's position as the National Centre for Marine Autonomy. For example, the barrier related to skills shortages have been considered when developing the Green, Blue skills hub mentioned above; work to address the regulatory gaps was developed under the Regulatory Pioneer Fund and continues to be a project considered for development under Team Plymouth; and support for the marine autonomy and wider port related economic activity is a primary focus of the maritime and waterfront investable theme under the Plymouth Economic Strategy

We have seen recent investment signals from the defence market with UK MOD recognising a need to modernise its approach to National Security and the commercial market recognising the growing role that smart robots / autonomous vessels can play in the offshore surveillance of assets such as wind turbines (both fixed and floating in the future), and cabling as well as in surveying the ocean floor for critical minerals, and in monitoring the flora and fauna of our oceans. Plymouth is at the forefront of the development and testing of these vessels through its Smart Sound provision which relies on coordination across all port users, to deliver in a safe manner.

More recently and as part of the broader Team Plymouth work the city has established a Marine Innovation Board which is set to ensure future growth opportunities linked to this marine innovation are coordinated and optimised to maximise the impact felt locally.

The council is working with the owners of undeveloped waterside space in the city to help create the right employment space to support the innovative activity to happen.

### **3. Invest in Port Infrastructure**

The city has taken an active role in supporting Port operators to invest into their own infrastructure, specifically and most recently in supporting ABP to invest into a shore side power offering. This would enable Brittany Ferries to plug into renewably sourced electricity while in port rather than running off the ferry's diesel engines. This significant project is expected to complete by the end of Q1 2026 if all things progress as planned.

The council is also monitoring funding opportunities to enable it to directly support the private sector to continue to invest in the Port Infrastructure of the city. While

these funding pots do not emerge regularly, being able to spot them early will enable the city to act quickly and in a coordinated way.

#### **4. Preserve Port Space**

Plymouth, under the current Plymouth and South West Devon Joint Local Plan, has a policy in place to safeguard employment land to ensure the city can provide enough employment space to meet the growth ambitions of the city. In light of recent activity around Team Plymouth, the Defence Growth Deal, and the designation as the National Centre for Marine Autonomy, the city's growth ambitions are being revisited. We are currently surveying industry in the city to understand growth ambitions to inform and strengthen the safeguards for employment land to include in the refreshed Plymouth Plan. Part of this will focus on safeguarding Port and surrounding land for marine related employment to ensure we are using our land in an optimised way for the city.

#### **5. Foster Communication & Collaboration**

The Council already enjoys a positive relationship with most of the stakeholders in the Port of Plymouth ecosystem, though organising a launch of the strategy which brought these stakeholders together did help to galvanise these relationships further.

On the back of this, in support of Maritime UK SW a range of stakeholders were brought together to discuss an upcoming funding opportunity linked to the ways to support the industry in decarbonizing – likely to result in a skills focused project which would aim to create the skilled individuals need to deliver decarbonisation projects.

There are already a variety of groups that bring a range of stakeholders together to support aspects of the Port's operations, the 'Cruise Partnership' for example. The Cruise Partnership brings together Associated British Ports, Cattewater Harbour Commissioners, Kings Harbour Master, Plymouth City Council, the two Business Improvement Districts and is led by Destination Plymouth. This group works together to bolster and maximise the city's offering to the cruise sector both by proactively marketing the city to cruise operators to increase the number of ships stopping in Plymouth but also to a great port welcome for visitors working with local businesses and volunteers. On the back of this work the city has seen its cruise numbers increase, bringing prosperity to the city.

There is an opportunity for the city to establish a Plymouth Ports Coordination Group for the city, the next stage in establishing this group will be to ascertain the unique role that it will hold. Many groups already exist in the city that have some overview of the marine environment, ports operations etc. and so deconflicting against these and ensuring the new group has a clearly defined role and remit is key to its success.

#### **6. Prepare for Net Zero Transition**

The various ports, wharfs and harbours across Plymouth will each face its own challenges in preparing for and embracing the transition to net zero. The role for the

council in this space is to communicate clearly on the opportunities that exist to support private entities to start on this journey. To date the city has hosted two Floating Offshore Wind focused events, raising awareness among our businesses of the opportunities for growth that this initiative potentially presents. Floating wind turbines are larger than the standard ‘fixed to the sea bed’ versions, allowing them to produce a greater amount of renewable energy. As they are floating structures they are also able to be sited in much deeper water, which is why the Celtic Sea has been identified for the roll out of the first at scale array of floating wind production in the UK with a plan for 4GW by 2035 growing to 15GW total. This will create manufacturing opportunities but also monitoring and surveillance requirements of the structures, a task that is likely to be completed by autonomous vessels.

In late 2025 the city hosted its first Net Zero Carbon event – showcasing and celebrating some of the activity that is happening around this agenda in the city. Events such as this provide an invaluable opportunity for businesses, including those who operate as port operators and corporate landlords, to hear about the latest technology and engage with companies at the forefront of this sector.

Continuing to deliver this event provides the stakeholders of the Port of Plymouth with an opportunity to learn and explore how they might go about delivering their transition to Net Zero.

## **Conclusion**

Set out above is a broad overview of the activity that has kickstarted since the launch of the Port of Plymouth Strategy that aligns to the ‘opportunities’ set out within it. Many of the activities outlined would have been delivered without the Strategy being in place, however, there would remain a risk that this activity would have been uncoordinated, and its impact is reduced.

The power of the Strategy lies in its ability to galvanise a diverse set of stakeholders around a single vision over and above any single stakeholders’ own priorities and drive activity to achieve that vision. The next stage for this Strategy is to establish the Plymouth Port Coordination Group to help ensure the broad activity being delivered remains coordinated.