

**July 2014**

# **RAMSGATE MARITIME PLAN**

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## Foreword

Every successful business plans for the future, looking at how it can improve its service levels, efficiency and profitability and identifying the resources needed to grow in a responsible manner.

The Port of Ramsgate is no different and has for many years developed its business planning to capitalise on its prime gateway location, stunning Royal Harbour and rich maritime heritage.

The Ramsgate Maritime Plan is an important part of this development and sets out an ambitious agenda to move the commercial Port of Ramsgate and Royal Harbour successfully into the future.

The plan is a high level, strategic document which will be key in determining the future maritime direction for the town and establishes exactly where we want to be.

We recognise the challenges we face, but need our goals to be ambitious to encourage greater productivity and success for businesses in and around the port and to maintain inward investment. Our ultimate goal, to create more jobs and increase prosperity for our residents.

With a thriving visitor economy, successful café culture and our proximity to Europe, we have considerable potential to realise further maritime growth and to maximise our links with the renewable sector.

The plan has been developed in consultation with key stakeholders and will be a living document which continues to evolve as we seek out further opportunities for development.

The commercial port and Royal Harbour are vital economic assets essential to Thanet's business. Our Maritime Plan has been developed to maximise this opportunity, capturing our tradition and history and transforming this into a business fit for the future.

Mike Harrison  
Cabinet Member for Operational Services

## Executive Summary

Ramsgate's port and Royal Harbour, owned and operated by Thanet District Council, is located 76 miles from the heart of London, and close to continental ports and harbours across the North Sea and Straits of Dover.

The commercial port has for the past decades, until recently, operated ferry services to both Dunkerque and Ostende and has become both a construction and now operation and maintenance base for three nearby offshore wind farms. The port adjoins the Royal Harbour.

The Royal Harbour forms a fantastic visual link between Ramsgate's attractive waterfront and the open sea. The dominant activity in the Royal Harbour is created by separate, well-appointed commercial and leisure marinas which provide safe berths for both local and visiting vessels.

The port and harbour lie in an environmentally sensitive marine area. The latter comprises of a number of nature conservation designations including Thanet Coast and Sandwich Bay Special Areas of Conservation and Special Protection Areas for birds together with Ramsar sites, the Thanet MCZ (Marine Conservation Zone) and Sites of Special Scientific Interest.

We have published this Maritime Plan, which has an evolving scope and purpose, as a high level guide for the future operation, development and management of the port and Royal Harbour.

## About this Plan

### Prime goals

This plan supports our 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 our residents and in particular:

- builds on the unique conflux of a major seaport and high speed rail link;
- rebuilds our reputation as a desirable UK visitor destination; and
- achieves those goals in ways that are safe, sustainable and environmentally sensitive and which recognise the challenges posed by climate change.

We realise that our goals are ambitious and that their realisation will depend upon a range of factors – not least funding – some of which will depend upon a business case or third party commitments. However, our ambition is not constrained and we hope this plan supports the vital roles of the commercial port and Royal Harbour in our community and economy.

### Why is a plan needed?

The main purposes of this plan are to:

- clarify our strategic maritime planning for the short, medium to long term;
- assist us, other planning bodies, transport network providers and other stakeholders in preparing and revising their own strategies;
- inform current and potential users, stakeholders and local communities as to how they can expect to see development take place over the coming years;
- promote the efficient management and operation of our maritime assets;
- support individual developments within the context of a wider strategic plan;
- appropriately maximise available land for economic uses;
- improve the public realm, particularly Ramsgate's historic waterfront; and
- identify and promote other complementary economic and leisure uses.

It does this by outlining:

- how the commercial port and Royal Harbour expect to grow and develop over time;
- why this may be feasible in the context of wider patterns of supply and demand;
- where changes of land use may be required to support growth; and
- how we will manage any development to mitigate its impact on the environment and local amenity.

## Consultation

In preparing this plan we have consulted with key stakeholders in order to understand their different perspectives and any opportunities or constraints which they feel may apply to the future development of Ramsgate's port and harbour.

We have held numerous separate workshops, each with a wide scope and external facilitation, with participants drawn from a range of different interests.

## Core plan context

This plan is not just for the benefit of regional and local planning bodies and local stakeholders; we believe that the process of producing and maintaining it will assist with:

- being clear and transparent about the future strategic direction;
- facilitating inward investment;
- engaging local and regional planning bodies at an early stage to allow any development to be incorporated at various levels of spatial planning and to secure the buy-in of stakeholders; and
- keeping local stakeholders informed of relevant maritime activities and building good working relationships locally.

This plan will be a key document in determining the future direction for Ramsgate's port and harbour, which are of considerable importance to the local and regional economy, both now and in the future.

This plan also fits within a wider policy context, as detailed overleaf.

The **Thanet Corporate Plan** emphasises the importance of protecting and diversifying the commercial function of the port as a key Kent cross-channel trade route; working with European partners and encouraging further location of sustainable energy businesses into the area, particularly at the port; and encouraging and influencing the growth of Thanet's economy, including the tourism/leisure, creative and sustainable energy sectors.

The draft **Local Plan** sets out a vision for 2031 and foresees:

- Ramsgate making the most of its close proximity to Europe and easy access to London;
- Ramsgate Port as a successful economic asset, essential to Thanet's business and gateway role;
- Thanet having a sustainable, balanced economy with a strong focus on tourism, culture and leisure;
- the importance of Ramsgate's maritime heritage; the commercial function of the Port; supporting renewable technology; its Royal Harbour, marina, beach and attractive waterfront, providing a vibrant mix of town centre uses, with a strong visitor economy and café culture; and
- a continuing policy for the growth of Ramsgate Port.

The ***Economic Growth and Regeneration Strategy*** identifies the port as a strategic asset for the District, which is part of a comprehensive transport system that adds to the area's competitive position. The strategy aims to:

- build on the transport and communications infrastructure hence improving the flows of goods and people between Thanet's key markets;
- work with industry to capitalise on Ramsgate's role as the support base for some of the world's largest offshore renewables projects;
- prepare for the future development and deployment of offshore technologies that build on the infrastructure that is already here; and
- capitalise on the area's natural advantages, its assets, heritage and culture that are unique selling points, to encourage private sector investment and support the visitor economy.

The ***Destination Management Plan*** sets out the priorities to help Thanet achieve its potential as a visitor destination. The Plan has been designed for a wide audience and has been informed by new market research. The priorities are:

- **Beach management and development** – to deliver a programme of prioritised beach-by-beach improvements, informed and steered by a new Beach Management Delivery Group, and to identify and deliver community and industry-managed beaches that are freely available to everyone and which incorporate the best creative and commercial ideas to enhance quality, protect the environment and deliver new distinctive experiences
- **Coastal regeneration** – to make a stronger case for tourism regeneration in specific underused or derelict coastal buildings and target inward investment to those specialist developers who can inject creative solutions and deliver new quality developments – large and small - that reinforce what is distinctive about Thanet and create much needed character accommodation
- **Telling our stories** – using the Shared Story developed for the DMP to create a stronger sense of place through a joined-up approach to marketing, information and interpretation, including helping small tourism businesses improve the quality of their marketing through skills development and support. The emphasis is on business engagement, support for the DMP and delivering a consistent quality product.

The ***Local Transport Plan*** highlights that:

- the future of the Port of Ramsgate depends very much on the development of new short sea shipping routes between Ramsgate and other European channel ports;
- in line with this view, we would wish to support the Government and EU initiative for the development of short sea shipping and aims to attract new business to Ramsgate's port;
- the development of the port is not expected to necessitate further land reclamation in the foreseeable future; and
- as a priority action, the port needs to build on its diverse commercial activities.

## Ramsgate's maritime origins and development

### History

Ramsgate's maritime tradition goes back to the Romans, but it was not until the 18th century that work started on building Kent's first true safe haven. Enclosed by two vast piers for sailing ships seeking protection from the severe channel weather, Ramsgate's Royal Harbour was completed in 1850.

Ramsgate is justifiably proud of its status as the only Royal Harbour in the UK and can trace its history back to 1749 when, following the Great Storm, Parliament passed an act giving approval for construction of a new harbour. George IV granted its Royal designation in 1821 in appreciation of the town's hospitality when he embarked, with the Royal Squadron, from Ramsgate for Hanover.

The Royal Harbour was one of the main embarkation harbours during the Napoleonic wars. In 1940, passenger ships, freighters and warships, unable to sail close enough to Dunkirk's beaches to evacuate the stranded British army, urgently requested small boats from England to help with the rescue of troops waiting on the beaches. Operation Dynamo was launched and boats and other small craft assembled in Ramsgate before crossing to Dunkirk to ferry men from the beaches in these "Little Ships". Around 40,000 rescued Allied troops were landed at Ramsgate.

### Royal Harbour

The Royal Harbour continues to perform valuable activities for both commercial and leisure users. It adjoins the historic waterfront and forms part of Ramsgate's centrepiece. The regeneration of Ramsgate depends, to a large extent, on the attractiveness of the Royal Harbour. It is a tourist and leisure attraction with significant potential and, through its marina, already offers much to smaller pleasure craft for which the European coast is within easy reach. Commercial fishing and ship repair activities are also carried out in the Royal Harbour.

### Commercial port

In the late 1970s we reclaimed land to the west of the Royal Harbour to create a modern commercial port facility. The development provided valuable vehicle and storage land and included the necessary Ro-Ro berthing, capable of handling multi-decked vessels and passenger facilities required for a cross-channel ferry service.

In 1985, a third Ro-Ro linkspan was installed and the turning vessel circle was dredged to allow for vessels up to 6.5m draught to berth onto the three linkspans. In 1986 the completion of extended breakwaters gave the Ro-Ro berths all-weather protection and ensured that year-round operations were practicable.

Further hard standing land was reclaimed, which now provides 32 acres of dedicated port land. The port's approach channel was further widened to accommodate larger vessels. A new passenger terminal was constructed and, in 1999 a new direct relief road tunnel link into the port was completed. Completion of the recent dual carriageway upgrade and extension of the A299 to the Thanet Way provides direct road links to both the M2 and the M25.



## Location and access

As of the 1 January 2015, the Emission Control Area (MARPOL Annex VI) affects shipping operators as it precludes the previous ability to utilise heavy fuels for propulsion without the efficient usage of expensive and bulky exhaust system scrubbers. Many merchant vessels are not suitable for scrubbers to be retrofitted due to the scrubber's size and weight which forces these vessels to use significantly more expensive higher grade fuels to meet the emission regulations. In order for operators to control the additional costs, the shortest sea passage routes are sought. The Port of Ramsgate is the second closest UK port to continental Europe and we will maximise our geographical benefit, along with Ramsgate's excellent road connectivity, to grow our business.

### By sea

Ramsgate's marine facilities provide direct access to the North Sea and English Channel, which benefits a wide range of different users:

- for commercial shipping, short sea journey times match, or beat, Ramsgate's competitors;
- for cruise ships, Thanet and Kent's tourist hinterland – including London and Canterbury – is within easy reach by road or rail;
- for leisure sailors, the Royal Harbour is an ideal port of arrival/departure for continental visits; and
- for offshore renewables, Ramsgate's dedicated facilities and strategic location unrivalled support for major North Sea and English Channel developments.

The table below illustrates the relative journey time for cargoes in transit from their UK origin to four continental ports travelling via Ramsgate, Dover, Harwich or Purfleet/ Dagenham/Tilbury and demonstrates the significant locational advantage which Ramsgate offers.

To	Via	Ramsgate	Dover	Harwich	Purfleet / Dagenham / Tilbury
Rotterdam cluster		1 =	1 =	1 =	+2 hours
Zeebrugge / Ostend		1 =	1 =	+2 hours	+2 hours
Dunkirk		1 =	1 =	+3 hours	+3 hours
Calais		+30 mins	1 =	+3.3 hours	+3.3 hours

1. The figure 1= indicates that there is no material difference between journey times.
2. Journey origins in the UK are Dartford, Lutterworth and Cardiff.
3. The composite results are indicative only, but are of sufficient accuracy to reflect the relative times.

### By land and air

The port infrastructure is such that both freight and passengers can be clear of the port and en route within minutes of disembarkation. The port has excellent inland transport links. A dedicated tunnel access, bypassing the town, links the port to the UK motorway networks. Road distances from Ramsgate are set out in the table below.

**Key UK road distances from Port of Ramsgate**

	miles	km
M2 (Junction 7)	24	39
M25 (East – Junction 2)	60	97
M25 (West – Junction 5)	62	100

A high speed rail link connects Ramsgate to London St Pancras in little more than an hour, with direct links from there to the national and European rail systems.

By air London Heathrow is less than two hours away by road and London Gatwick is an hour and a half away.

## Existing facilities

### Royal Harbour and historic waterfront

The Royal Harbour's visual appeal and the leisure activities available in it have a key role to play in rebuilding Ramsgate's reputation as the UK's essential maritime destination for visitors.

It is part of Ramsgate's historic waterfront which, with the town beyond, offers a wide range of leisure and retail activities (bars, restaurants, cinema and shops). For the visitor, the area includes award-winning beaches, seal watch trips (in season) and excellent public transport.

### Marina facilities

The Royal Harbour accommodates a marina for local and visiting leisure craft. The Yacht Harbour Association presently recognise the marina's facilities with the award of 4 Gold Anchors, the extensive facilities include:

- secure, dedicated permanent and visitor berths;
- 24 hour access to the sea from the Outer Harbour;
- fuel available 365 days a year;
- full repair facilities ashore and afloat;
- water and electricity readily available;
- modern amenity blocks with free showers, toilets and coin operated launderette facilities;
- 24 hour security, with CCTV surveillance;
- wireless internet;
- a 40 tonne boat hoist servicing both a secure boat yard or lifts to/from transport;
- 3 haul out slipways which can accommodate vessels up to 60 metres in length and 500 tonnes in weight;
- recycling points;
- access for people with disabilities includes selected moorings, wheelchair accessible amenity block with dedicated showers and toilets;
- chandlery, sail loft, slipways, boat park and brokerage;
- dedicated parking;
- a hospitable yacht club overlooking the Royal Harbour Marina;
- a thriving waterfront with many bars, cafes and restaurants; and
- recently refurbished and updated units along Military Road to service the leisure and yachting community.

## **Commercial fishing**

The Ramsgate fishing fleet is mainly composed of vessels under 10m working within the 6 or 12 mile limits. The principal species caught are sole, skate, plaice and cod as well as a large array of shellfish.

The fleet operates within the Kent and Essex Fisheries Committee district. It is this committee which regulates the activities of Ramsgate's fleet, through a licensing scheme which limits the quantity of fish caught. These quotas have reduced over time, causing a decline in activity at Ramsgate and elsewhere. Despite this, the Ramsgate Fishermens' Association have been very active in gaining support for the future of Ramsgate's fleet and have diversified their activities to support the growing offshore energy sector. The Port of Ramsgate has worked with the European Fisheries Fund to secure match funding to enable the upgrade of pontoons and associated service infrastructure in the outer east marina for the benefit of the fishing industry.

## **Commercial port**

The commercial port is the second largest municipally-owned port in the UK. It can handle up to 5 million passengers and 0.5 million freight units annually and accept vessels up to 175m LOA, 6.5m draft, with no tidal restrictions.

Its facilities includes:

- 32 acres of commercial port land;
- three modern Ro-Ro bridges and pontoons with double lane access;
- a fast freight ferry service capability;
- tri-berth simultaneous operation;
- full passenger services and freight vessel facilities;
- modern and effective VTS;
- multi-deck vessel, stern and quarter ramp capabilities; and
- water and bunker facilities on all berths.

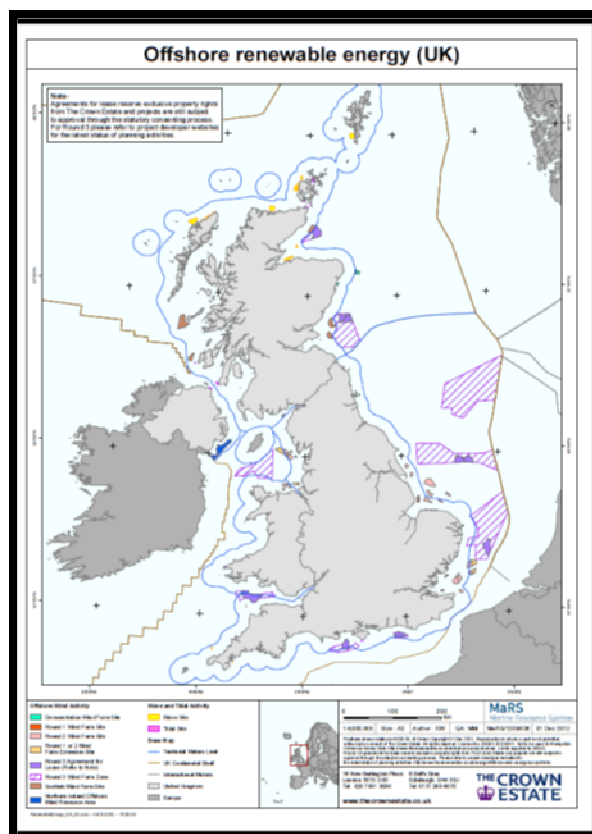
The commercial port's shipping activities covering Ro-Ro and bulk cargoes are key economic drivers.

## Marine energy<sup>1</sup>

The port has firmly established itself as a support centre for the offshore wind industry by attracting major customers including Dong, Eon, Masdar (London Array), Vattenfall (Thanet Offshore Wind and Kentish Flats), Vestas and Siemens Wind Power.

Its strategic location close to current and planned offshore renewables sites in the Thames Estuary and the North Sea (see map opposite) has been recognised by major wind industry players, who have made long-term commitments to the port by establishing operating and maintenance support bases.

This has enabled the port to invest and also sparked the growth of onshore supply chain business opportunities, and therefore training and employment, regionally.



<sup>1</sup> A copyright licence may be required to authorise reproduction of The Crown Estate's map.

## External Funding successes

As a municipal port, major developments within the port and harbour are reliant on additional income streams and even more so external funding.

The Port of Ramsgate has been fortunate over the last few years to be able to work closely with other continental ports and form robust partnerships used to drawdown European grants, whilst additionally exchanging 'best practice' experience.

A long track record in applying successfully for European grants has been established and these have been utilised to fund substantial improvements to both the port and harbour.

The four most recent Interreg projects have been PATCH (Ports Adapting To Change), LOPINOD (Logistics Optimisation for Ports Intermodality: Network, Opportunities, Development), Yacht Valley and PAC2. Below is a small synopsis of how these projects have enhanced and allowed the port and harbour to develop.



PATCH allowed the investment in the replacement of the harbours aging South Eastern Breakwater pontoon. As a result we are able to accommodate moorings for larger Wind farm vessels in the harbour and this has led to the Port and Harbour becoming a renewable hub which has benefited supply chains and local employment.

The project also allowed us to undertake non-destructive testing inspections to berths, adapt port facilities, host an event on Blue Energy, install the Meter MAC system across the harbour, install Cathodic protection on berths, fund CCTV cameras, replace signal lights for port control and install an electronic tidal gauge.

The Port and Harbour's involvement in LOPINOD came about as a result of the connections built up through previous Interreg projects and we immediately stepped in to replace a partner who had dropped out. Our involvement in the project has been more about master planning for the future rather than physical development.



Through this project we funded both an Economic study and undertook partner engagement into the possibility of developing an Alongside Quay at the Port of Ramsgate. Although the initial outcome of the report was that in the short term we should concentrate on our current business, the report has shown that an alongside quay is possible in the future, particularly with the 2015 Emission Control Area ramifications.

With an ever increasing focus on Low Carbon by the EU programmes and with us wanting to be as environmentally responsible as possible, LOPINOD is also being used to fund the development of a Low Carbon Plan. This plan will focus on the full spectrum of renewables including wind, solar, marine source heat pumps and tidal. It is hoped that we will become a hub for all green energy going forward, building on our existing involvement in the wind farm industry.

It is through the capture of all ports greatest asset, the sea, that we hope to capitalise the most. Through the development of a tidal barrage we hope to generate our own electricity and to heat port and harbour buildings by using marine source heat pumps.



Yacht Valley concentrated on three main objectives, the development of Military Road Arches and 2 feasibility studies, one on the Smeaton Dry Dock and the other on further development of Yacht Servicing facilities.

The enhancements undertaken to the Military Road arches has resulted in the arches being utilised by a good mix of tenants. These tenants are not only in relation to yacht servicing, but also restaurants, cafes and art galleries which has led to increased footfall and an improved café culture in the harbour area.

The Smeaton Dry dock study will focus not only on the history of the dock, but on future uses and how these could benefit the local area.

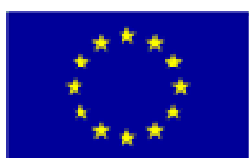
The outputs of the study can then be considered and future development of the dock realised.

A study on improvements to yacht servicing is also being completed and from the direct outputs of this study, some additional investment activity will take place in the harbour area utilising the Yacht Valley funding.

PAC2 is an Interreg Cluster project that has come about as an alliance of partners from the PATCH and C2C (Sea to Sea) Interreg projects. The first phase of the project has been approved and digital promotional material will be developed to celebrate previous involvement in the PATCH project and in order to further promote the Port.



One of the most important aspects to us of all of the EU projects has been the ability to network and share experiences and ideas, which will lead to future improvements and has created strong partnerships to aid future trade.



The European Fisheries Fund  
Investing in Sustainable Fisheries

On top of the Interreg programmes we have just been awarded a grant from the European Fisheries Fund in order to fund 50% of the Outer Eastern Pontoon replacement. These pontoons are used by Ramsgate's fishing fleet and have now come to the end of their serviceable life. The replacement safeguards the fishing fleet and the added benefits they bring to the local economy.

### What's next.....

The External Funding market place is becoming increasingly difficult given the winding up of Regional Development Agencies (RDA) and the drying up of funding from Central Government. The creation of the Local Enterprise Partnerships (LEP's) has changed the way funding will be administered via central Government to the local area. The Single Local Growth Fund will provide funding to LEP's to deliver specific activity, with the majority for transport schemes. The LEP will also play a key role in developing projects for and delivering European Structural Funds. During 2013-14 The South East LEP developed a Strategic Economic Plan and European Structural and Investment Fund Strategy for Government to agree and allocate funds against accordingly.

We are in the unique position of being one large and mainly listed asset. This opens up funding from a number of additional sources including Heritage Lottery Fund and English Heritage. With lottery sales and the percentage allocated to the Heritage Lottery Fund, increasing an increased amount of grant funding is available.



In addition, although the 2007-2013 European Funding Programmes are drawing to a close, the 2014-2020 Programmes are starting to emerge. The new programmes include exciting opportunities such as Horizon 2020, Interreg and the European Fisheries Fund.

With the partnerships already formed through past projects we are in a prime position to bid into these funds when they become available, which will lead to further enhancements that will benefit the port, harbour and the local community.



## Future vision: Royal Harbour and historic waterfront

### Royal Harbour

Ramsgate is already a popular tourist attraction with significant growth potential.

We will undertake a range of improvements in order to help attract more visitors and to enhance the tourist and leisure experience:

- shore-based attractions and pedestrian access within the Royal Harbour need to be enhanced in order to achieve better integration with the historic waterfront; and
- some current marine uses will be adapted and improved in order to make best use of the facilities.

We are attracting greater footfall to the Royal Harbour following the improvements made to the Military Road arches and the variety of uses they now offer.

Any new development should enhance the Royal Harbour and be congruent with its key (marine-related) brand attributes. Retail, educational and leisure/pleasure uses (A1, A3 and D2) should be supported.

Those uses should exploit links with Ramsgate's commercial fishing fleet and the Royal Harbour's unique history and location (adjacent to a recommended MCZ<sup>2</sup>, possible World Heritage Site and NOSTRA<sup>3</sup>).

The inner and outer areas of the Harbour will focus on the development of their core heritage, commercial activities and leisure strengths in order to enhance their appeal to mariners, yachtsmen and visitors alike.

As part of the drive to improve the historic waterfront, priority will be given to functional and quality improvements of the marina and the marina operation itself. These improvements cover the service standard provided by the marina (the anchor rating) and competitive pricing. We will use our bathymetric hydrographical surveys to deploy dredging in an appropriate and timely manner.

### Commercial fishing

We will safeguard an area in the East Marina / Commercial Quay for commercial fishing and support the development of a specialist fish quay/market, a fish processing capability, a quayside chill store (with ice facility), an amenity and training / education facility.

We will explore appropriate sources of domestic and EU funding for those developments and potential ways in which to attract new fisheries business.

A new fish market will also enhance the appeal of the Royal Harbour to tourists and contribute towards our goal of increasing visitor footfall, particularly in the area of the undeveloped commercial quay.

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<sup>2</sup> A marine conservation zone, established under the Marine and Coastal Access Act 2009, intended to protect the sea's biodiversity.

<sup>3</sup> The NOSTRA (Network of Straits) project aims to allow economic development while preserving biodiversity and natural heritage.

## **Ship repair**

There are three historic slipways in the Royal Harbour which are in commercial use and operated by Ramsgate Harbour Slipways. These slipways adjoin Ramsgate's waterfront and, whilst of interest to visitors, some of their activities are not well suited for a tourist location.

Subject to a business case (and therefore funding), new, modern slipways should be established in the commercial port and commercial uses transferred to that new location. The existing slipways (which are listed) could then be allocated for limited usage, predominantly in connection with the maintenance and repair of historic vessels.

We will therefore consider proposals for the creation of new slipway vessel lifting facilities and covered ship repair facilities in the port area to service the needs of commercial vessels and larger pleasure craft.

## Future vision: commercial port

We believe that the port's competitive potential may be much improved by the implementation of MARPOL VI regulations in 2015. They will require the use of much more expensive low sulphur marine fuel and will significantly increase operating and therefore ticket prices charged and create real advantage for the Port of Ramsgate for both freight and passengers because of the very short UK-continent Channel crossing.

We will therefore safeguard the commercial port and its berthing facilities for use by commercial shipping and support the future development of new marine infrastructure.

Once we have maximised our current port infrastructure, then attention will be given to the diversification of the types of vessels that can be handled. The commercial port business is restricted by the lack of an alongside berth and we will develop plans for the provision of that capability.

Due to the port's proximity to the town, any development of the commercial port area will have regard to existing leisure activities, as well as environmental and heritage assets including, in particular, Ramsgate's historic waterfront.

### Ro-Ro trade

The commercial port has excellent Ro-Ro facilities and supporting road connectivity. The short sea passenger and freight markets suffer from excess capacity and, although Ro-Ro growth to 2020 is forecast at 15%, any market share will have to be won from competitor ports. It is anticipated that the increase in fuel prices associated with the emission regulation changes in 2015 will create new opportunities for Ramsgate, as the short sea crossings to the near continent to attract existing operators which are currently trading on longer routes.

The port's market position is also considerably enhanced by the availability of development land owned by us, with potential for port-centric logistic uses. A strategic rail freight interchange facility linking directly to the high speed and national rail network would also enhance the commercial port's attractiveness to supply chain users who typically have a requirement for land and excellent inland distribution connections.



For those reasons, the port's strategy will include the development of Ro-Ro businesses with an expanded focus on the commodity supply chains (*i.e.* the links between shippers and receivers in the UK and Continent), as well as the ferry lines which form an important part of those links.

The port will pursue a Ro-Ro strategy to exploit the changed market opportunity and it will:

- validate the Ro-Ro trade's requirements and test the market demand and potential for a longer term inland port/port-centric logistics/strategic rail freight interchange facility;
- employ or contract a highly experienced commercial/trade manager to formulate and execute the Ro-Ro and port-centric strategy;
- identify continental partner ports, principal commodity types to be targeted, and the related UK element of the allied logistics chains, in conjunction with UK-based commodity managers; and
- plan to achieve maximum water depth/widths in the port and its approaches.

Growth in the commercial port's Ro-Ro business will utilise spare capacity of existing infrastructure and also conflict least with leisure uses at the Royal Harbour and historic waterfront.

### Renewable energy

The further planned increase in the UK's offshore wind capacity – including the Kentish Flats expansion – offers considerable potential to grow the port's support facilities and increase its geographic reach to provide cost effective through-life engineering and logistics support to offshore renewables in the North Sea and English Channel.

The table below shows, by development status, actual and proposed generating capacity, which demonstrates the future scale of opportunity for the port.

Status	Installed Capacity (MW)
Operational	2678.4
Under Construction	1538
Awaiting Construction	2388
In Planning	5611
Scoping	33919

Source: UK offshore wind farm development (DECC, February 2013)

Support requirements are likely to change and grow following construction of planned sites in the Thames Estuary, North Sea and English Channel.

The port is anticipating further growth as blue energy, tidal and wave capture becomes a reality. This is expected to occur within the near future as the technology develops towards commercial reality and could be seen as an 'add-on' to the existing offshore renewables infrastructure.

The development of other sources of renewable marine energy offers further opportunities for the port to further expand as a centre for both green and blue energy.

We recognise the need to integrate offshore renewables operating and maintenance capabilities with the other requirements of the industries involved, particularly training and construction-related. This may mean collaboration between ports in order to deliver turnkey solutions. The commercial port will actively seek to identify and exploit partnership opportunities with other ports in the UK and Europe.

The port's nascent concentration of expertise creates opportunity to provide cost effective through-life engineering and logistics support in Thanet. It also offers potential for the port to become a recognised centre of excellence and to exploit its position through the creation of higher skilled job opportunities to serve an emerging but growing industry.

To support all of these activities, we will:

- safeguard the current and potential offshore renewables support areas within the commercial port;
- establish a centre of excellence in offshore renewables support in Thanet and/or Ramsgate (and consider the possible linkage to an inland port-centric facility);
- develop South East regional 2nd/3rd/4th-tier support cluster for southern North Sea, Thames Estuary and Channel offshore renewables projects; and
- forge a link to job creation in manufacturing, engineering, logistics, training & education in Thanet & East Kent.

The successful implementation of this part of our plan will:

- create direct and indirect employment opportunities which will, over time, result in a market leading and highly skilled workforce with the capability to offer its services internationally; and
- stimulate demand for marine-related services (such as towage, bunkering and ship repair) as well as a wide range of inland, non-marine services which will contribute to economic growth.

### **Bulk commodity trades**

The commercial port has the capacity to handle a range of dry bulk and other trades subject, in some cases, to the requirement for an alongside berth which the port cannot currently offer. As sustainable opportunities arise, we will support investment in additional facilities and operating plant and equipment in order to handle new business.

Currently the commercial port operates an aggregates facility in partnership with Brett Aggregates. There is scope to handle greater volumes which the commercial port will exploit within the region.

The commercial port lacks a significant market hinterland which might underpin demand for other bulk products. The majority of the latter are, in any event, relatively high volume/low value cargoes. These nonetheless would require additional port facilities which would attract capital expenditure.

Through investment in the commercial port's sales and marketing capabilities, we will scope opportunities to grow this business.

### **Cruise**

The long term trend in the European cruise passenger market shows strong growth. This is supported by a noticeable trend in 'cool water' cruising in northern Europe which showed a 10% growth in 2012. Ramsgate is well placed to take advantage of this shift in the market.

Ramsgate is an attractive historic town and one of the ancient Cinque Ports. Its easy access to London, Canterbury, and the Medway coast makes it an ideal location for cruise ship calls. The port will promote its capabilities with a view to increasing the volume of turnaround and cruise calls.

We will undertake a scoping project to understand the potential opportunities to attract cruise business, however it is recognised that this would be best facilitated with the delivery of an alongside quay.

## Increase market awareness

The commercial port and Royal Harbour serve different and distinct markets and we believe it is important to brand them separately and pursue different, but complementary, plans for their development, as set out in this plan.

To that end, we will create and implement specific communication and marketing strategies for each of the commercial port and the Royal Harbour Marina.

## Key priorities

### Key priorities

As we acknowledged at the beginning of this plan, our goals are ambitious. While we intend over time to deliver each of them, we have to apply our available resources according to the benefits each has the potential to deliver.

With that in mind, in the short term we will give priority to the following areas:

- protecting and growing the existing relationships with users of the port and harbour in order to assure service standards and secure future income streams;
- implementing the Ro-Ro strategy described in this plan to restore the commercial port's market position and recover recently lost revenue;
- making improvements at the Royal Harbour Marina (new marina management system, increasing visitor footfall and dredging) to significantly enhance the user experience and attract more visitors;
- keep the re-launched website fresh to support the commercial port and Royal Harbour Marina in order to raise substantially their market profiles.

We believe that, taken together, the implementation of these priorities will deliver early benefits and contribute substantially to the realisation of our prime goal - the economic regeneration of Ramsgate and the Thanet region.