



MP244 Tipner

2023 Marine Employment Land Assessment

28 September 2023

MP244 Tipner

2023 Marine Employment Land Assessment

Marina Consultancy Services by Marina Projects Ltd

Prepared for: Portsmouth City Council

28 September 2023

Document Ref No: MP244-R-09

Name	Date
Prepared by Mike Ward	17/02/2023
Approved by Phil Dunn	28/09/2023

Status	Description	Date
Draft	Issue to Savills for review	21/02/2023
Rev 1	General edits and qualitative assessments	22/04/2023
Rev 2	Appendix Plans included	01/05/2023
Rev 3	Update to address Savills comments and extend to 2040	22/09/2023
Rev 4	Minor edits – Final Issue	28/09/2023[Date]

Contents

1	AIM & BACKGROUND	4
1.1	Background	4
1.2	Approach	4
2	TIPNER WEST: SITE CONTEXT	5
2.1	Project Profile	5
3	WATERFRONT ASSETS REGISTER (2015)	7
3.1	Tiers and Typologies	7
3.2	Summary	7
4	UPDATED ASSESSMENT	8
4.1	Tier 1- Potential to Transition	8
4.2	Tier 1 – Existing use with growth prospect	9
4.3	Excluded Sites	9
4.4	Tier 2/3 Sites	11
5	SUMMARY	13
6	APPENDICES – SITE PLANS	14
6.1	Tier 1 – Potential to Transition	14
6.2	Tier 1 - Existing use with growth prospect	15
6.3	Excluded Sites	18
6.4	Tier2/3 Sites	21

1 AIM & BACKGROUND

The aim of this report is to provide an updated assessment of the land available for development of marine sector employment facilities.

The study is to be read in parallel with the assessment of demand for additional marine employment land in the Solent Local Economic Partnership (LEP) area, which has been identified by Savills Economics as the Property Market Area (PMA) and the basis for this update report. The PMA needs to be consistent across both reports in order that an assessment of the demand for, and supply of, marine employment land can be assessed in the context of a consistent regional geography.

We endorse the use of the Solent LEP area as the basis for the PMA used in both reports. The Savills report is titled 'Marine Employment Market Assessment' (Savills, August 2023).

1.1 Background

The Waterfront Assets Register commissioned by the LEP in 2015, provides an inventory of existing and potential sites. This provides a sound basis to commence the assessment of available marine employment sites; this report provides an up-to-date assessment of the supply of available sites based on on-line research, site visits and MPL's considerable knowledge of the Solent's marine and maritime economic infrastructure.

1.2 Approach

The assessment provided herein, commences with a summary of the key assessments provided within the Waterfront Assets Register from 2015, we have then considered the categories of sites that might provide marine employment opportunities for the development of marine employment activity (including review of sites specifically excluded from the assessment in 2015). Against each category we have reviewed the 2015 data (where relevant) before making an assessment of the current situation. What results is a current day assessment of available land supply for expanded marine employment uses across the PMA.

2 TIPNER WEST: SITE CONTEXT

The Site comprises Tipner West and Horsea Island East, located in Portsmouth, some of which has been identified as having potential to accommodate 58,000 sqm of marine employment floorspace. The development proposals for the Site are expected to come forward as a mixed-use community including between 814 – 1,250 homes, shops, leisure & community facilities, marine employment and transport infrastructure in line with the Project Profile as outlined below. A range of concept options have been developed for the Site, including greater and lesser scales of development, all of which have been subject to an options testing process using sustainability-derived criteria and statutory tests. The development options included a previously rejected option with a greater scale of development and a 'do minimum option' where the site is protected from future flooding arising from predicted sea level rise.

The wider proposal is predicted to generate significant Economic Benefits as detailed in Savills reports 'Market Analysis' (2019) and 'Tipner Economic Benefits Assessment' (March 2020). The employment land will need to generate circa 58,000 sqm of employment floorspace, which would deliver approximately 300 construction jobs and approximately 1,900 marine employment jobs once completed.

Supporting its development for marine employment is the classification of 'Tipner West' as a Tier 1 waterfront site in the study report 'Maritime Futures: Solent Waterfront Sites, Final Report (2015) by the Solent Local Enterprise Partnership (LEP). It was given this classification based on its attributes when assessment against three defined criteria:

- ☐ Marine Access (e.g. water depth and access)
- ☐ Presence of Marine and Maritime Activities
- ☐ Development Potential

2.1 Project Profile

Figure 2-1 shows an oblique aerial view of the Site when viewed from the north west, with Horsea Island East in the foreground and Tipner West in the background. Horsea Island East comprises an area of dense scrub with some trees. It is a Site of Importance with Nature Conservation (SINC). A small part of the Navy Dive Centre (HMS Excellence) is shown to the west of, and adjoining, Horsea Island East, with the M275 motorway to the east. Tipner West extends to the west of the M275, comprising an area of flat low-lying land in multiple land uses: the former Royal Navy firing range, Tipner School (special needs school), the Nautical Seamanship Training Centre, two boat clubs, a storage hardstand used by Portsmouth Port, and Tipner Point containing a number of existing/former industrial activities. Areas of scrub and vegetation surround these land uses.

These two parcels of land are separated by Tipner Lake, forming part of Portsmouth Harbour, designated a Special Protection Area (SPA) for overwintering birds. Access to Tipner West is from junction 1 on the M275. Horsea Island East has no access to a public highway but can be accessed via the former Paulsgrove landfill site to the north.

The Project Profile is based on the broad requirements contained in the Southampton and Portsmouth City Deal (2012), which can be summarised as:

- Maximising the economic impact of marine and maritime assets in the area by unlocking critical land at Tipner-Horsea Island to deliver 58,000 sqm of marine employment and between 815 and 1,250 housing units to enable the marine and advanced manufacturing sectors to expand; ensuring people have the right skills to access employment in those growing sectors and providing effective support to SMEs to enable them to grow.

This Project Profile encapsulates the key elements of City Deal and reflects the Council's seven guiding principles. The Project Profile has informed a concept plan optioneering process and has in part led to options that deliver on these amounts of development, with the scale of the housing component tied to achieving a deliverable scheme given the abnormal costs associated with the delivery of marine employment and associated marine infrastructure. The abnormal costs mean that the market would likely fail to deliver in isolation the marine employment of the type that has been identified as needed to fill the gap in the marine employment facilities offer across the Solent.

The quantum of housing needed to support marine employment has been adjusted from that implied in City Deal to reflect the greater understanding of viability and the over-provision of housing at Tipner East: the current range is between 815 and 1,250 new homes. The quantum of marine employment remains as identified in City Deal: separate studies on the marine employment potential reviewed past studies and undertook a benchmarking exercise, concluding that 58,000 sqm would represent a regionally significant marine employment hub, as intended in City Deal.



Figure 2-1 Tipner West & Horsea Island East

3 WATERFRONT ASSETS REGISTER (2015).

The aim of the waterfront employment sites report, and the assets register that it produced, was to provide a comprehensive register of existing and potential waterfront sites in the Solent region and to provide an understanding of their characteristics and assets. The need for this register was a result of concerns raised, over a significant period of time, by marine & maritime businesses that valuable waterfront land, suitable for the growth of marine industries, was being lost to alternative developments.

In summary, the Waterfront Assets Register identified the following:

- 97 waterfront sites identified with a total supply of 1,730ha.
- 17 sites occupied by MOD, ports/ferry, operators and utilities and 11 sites were marina facilities
- The above 28 sites were excluded from the analysis due to the comprehensive nature of facilities and support already provided to the maritime sector with little/no scope for expansion.
- Remaining 69 sites provide a total of 443ha of waterfront land
- Around 100ha was noted as being underdeveloped – less than 6% of the total supply
- Only around 10ha is undeveloped waterfront land with permanent waterfront access

3.1 Tiers and Typologies.

The 69 sites were ranked by typology and importance and this filtering identified:

- The sites most suited to marine employment with Tier 1 sites showing the best attributes. Tiers 2 and 3 had reducing prospects and value
- Those sites that were at capacity with no prospect of enhancement.
- Those sites with prospects for converting to, or expanding the provision of, marine employment.

3.2 Summary

The study identified the sites across the Solent region that offer the “best characteristics to give continued support and growth” and the ability to transition to marine and maritime employment.

Tipner West was clearly identified by the Solent Waterfront Assets Register as the largest and best Tier 1 site with development potential for marine and maritime employment.

Review of the Solent LEP’s Waterfront Asset Register identified a comprehensive, thorough and objective review in 2015, of the availability and classification of waterfront employment sites, (including opportunity sites) across the Solent Region. The report, commissioned by the Solent LEP, with the express aim of supporting the delivery of regional growth policies, provides a sound basis to commence the process of identifying the current land supply for marine employment.

Notably, the report makes a number of observations:

- Existing waterfront employment sites are performing well with a generally low level of vacancy.
- The marine and maritime sector across the Solent is expected to grow and demand for sites is likely to increase.
- Delivering good access to water was noted as being essential to the prospects of delivering sustainable marine employment prospects at a given location.

4 UPDATED ASSESSMENT

This updating of the land supply assessment looks at four distinct categories of sites, from the Waterfront Assets Register, that might potentially provide opportunities, within the timeframe of the assessment (to 2040).

The four categories are:

- The Tier 1 sites with the best prospects for transition to marine and maritime employment.
- Other Tier 1 sites currently in use for marine and maritime employment but with observed prospects for growth and further development of maritime uses.
- Those sites originally excluded from the assessment, but either currently available or with the potential to come forward within the time frame of the assessment.
- Tier 2 and 3 (secondary/tertiary sites) with observed development potential.

In addition to the updated assessment, the original 2015 data is also provided, for reference.

4.1 Tier 1- Potential to Transition

As noted above, this section updates the assessment from the Solent Waterfront Assets Register of prime sites with the potential to transition to marine and maritime employment.

Table 4-1 Tier 1 - potential to transition to marine and maritime

Ref	Site	Site area (ha)	Undeveloped (2015)	Available (2023)
14	Tipner	25.3	19	9ha
49	Spitfire Quay	10.96	1.1	1.1ha
55	Lower William Street	2.9	2.9	0
90	Vestas Technology	3.7	3.7	0
sub-total		42.86	26.7	10.1ha

Table 4-2 Category 1 Qualitative Assessment

Site	Description
Tipner	Partially developed site with access to water and the potential for dredging to provide all-tide access. Excellent road connections due to the proximity of the M275, requires remediation. Potential to grow and transition to marine employment with significant investment
Spitfire Quay	Extensively developed site with limited available and underutilised land. Poor road access. Good tidal access. Available land area limits benefits for the sector
Lower William Street	Established and fully occupied site, limited potential for consolidation of non-marine activity. No quayside access, single deep-water berth at end of jetty
Vestas Technology	Site Fully Occupied by Vestas Offshore Blades (advanced manufacturing) – no current prospect for marine employment use. Poor road access and no prospect of full tidal access

4.2 Tier 1 – Existing use with growth prospect

Sites under this category generally already have an established industrial typology or marine use and were identified as having a prospect to grow or transition for marine use.

Table 4-3 Tier 1 - growth potential of existing industrial or marine and maritime use

Ref	Site	Site area (ha)	Undeveloped (2015)	Available (2023)
27	Royal Clarence Yard	2.15	2.15	Occupied
34	Daedalus	83.1	83.1	No access
47	Centenary Quay	3.5	3.5	1.2ha
72	Marchwood Industrial Park	56.64	5.66	5.7ha
79	Venture Quays	2.04	2.04	0.4ha
94	Medina Yard	5.25	1.5	1.5ha
sub-total		152.68	97.95	8.8ha

Table 4-4 Category 2 Qualitative Assessment

Site	Description
Royal Clarence Yard	Site released by the MOD and now in use by UK Docks as marine service centre – has transitioned to marine and maritime and no longer available
Daedalus	Poor marine access and no prospect of creating quayside or meaningful access to the water. Site separated from coast by main road. Subject of current planning application for visitor attraction and mixed-use community. No marine employment opportunity
Centenary Quay	Partially developed for marine use since 2015 and currently occupied by Ocean Infinity. Indirect road access. Deep water berth with quayside access. Good site attributes but the undeveloped portion of site is of limited scale
Marchwood Industrial Park	Established industrial site, with some limited potential for further marine and maritime use. Immediate access to the water is provided via a vacant quayside plot. Note however that this element has a mineral related classification which potentially restricts use and the ability to deliver marine and maritime employment.
Venture Quays	Established marine site that since 2015 has largely grown to support further marine and maritime use, including Wight Shipyard and some freight marshalling activity for Red Funnel.
Medina Yard	Established marine site with limited potential for further development of marine uses. Good quayside access to deep water, poor road connections.

4.3 Excluded Sites

As highlighted in Section 2, the Solent Waterfront Assets register identified some 28 sites that contributed to the existing supply of marine and maritime land but were not considered to be available, under threat from competing/neighbouring uses and had no prospect in the short term of adding to the

available land supply. These included MOD sites and locations that were part of utility infrastructure. Since the 2015 assessment, the status of a number of sites has changed or has the prospect of changing. It is notable that the Fort Blockhouse site, if it is released, will come forward in stages rather than as a single site and so it is listed separately.

This list of sites has been the subject of further review to establish potential for maritime land supply to come forward. The assessment is outlined below.

Table 4-5 Update of Excluded Sites

Ref	Site	Site area (ha)	Available (2023)
	Fort Blockhouse 3	5.65	2.5ha
	Fort Blockhouse 1	14.96	6ha
	Horsea Island	106.3	0ha
	Marchwood Military Port	60.4	6.4ha
	Former Fawley Power Station	43.36	6ha
	sub-total	230.7	20.9ha

Table 4-6 Category 3 Qualitative Assessment

Site	Description
Fort Blockhouse 3	Current MOD site, subject of future disposal strategy, not currently available. Limited road access. Access to water is heavily constrained by Haslar bridge and/or requires road crossing
Fort Blockhouse 1	Current MOD site with significant heritage assets, subject of emerging disposal strategy, not immediately available. Extensive liabilities (quay wall) and questionable viability. Supporting development likely to limit available employment land. Deep water jetty but in poor condition and with existing occupiers. A particularly complex site to unlock. Certain to come forward separately to Fort Blockhouse 3 so addressed separately
Horsea Island	No access to water, heritage slipways recently listed, environmental constraints and sensitive adjacent MOD uses restrict potential for development. Currently no road access. As a standalone site the lack of water access curtails potential – option in combination with TW.
Marchwood Military Port	Operator of the military port recently acquired by ABP. Use will remain for commercial ferry port/defence/logistics. Excellent access to water but limited to port uses
Former Fawley Power Station	Development site with good marine sector prospects. Improving road access consequent of development proposals. Access to water is of limited depth and constrained by width and dock arrangements that will influence the nature of use. The area of land available for marine employment is taken from the current development proposals for the site.

4.4 Tier 2/3 Sites

In general, these sites provide areas that are small in nature and there are fundamental reasons why they are not considered as primary opportunity sites. Typically that is because they display the required aspects less consistently across the various criteria of marine access; presence of marine and maritime activities and development potential.

Table 4-7 Secondary and Tertiary Prospects

Ref	Tier	Site	Site area (ha)	Prospect (2015)	Available (2023)
30	2	Priddy's Hard	3.06	Med	1ha
36	1	Swanwick Marina	4.42	Med	Occupied
57	3	Bakers Wharf	1.63	High	0.5ha
58	3	Millbank Wharf	0.84	Med	Established use in place
60	2	Dibbles Wharf	1.65	High	0.8ha
64	2	Chapel Riverside	7.13	High	Approved for residential development
71	2	Eling Wharf	15.52	High	1.5
85	2	Kingston Wharf	3.07	Med	1.1ha plans approved (Jan 23) for maritime use
87	3	Island Harbour	2.6	High	Established marina and Residential. site
Sub-total			39.9		4.9ha

Table 4-8 Category 4 Qualitative Assessment

Site	Description
Priddy's Hard	Established industrial site, limited access to water via long jetty, limited prospect for marine uses
Swanwick Marina	Established marina site, fully occupied and no available land
Bakers Wharf	Established industrial site, quayside with restricted access to water, limited prospect for marine uses
Millbank Wharf	Established industrial site, quayside with restricted access to water, limited prospect for marine uses
Dibbles Wharf	Established industrial site with mainly marine uses (port logistics), good access to water with quayside, limited prospect for expanded marine uses
Chapel Riverside	Now subject of an approval for residential development and limited commercial, marine employment potential lost.
Eling Wharf	Established industrial site and commercial wharf, quay wall access but shallow water. Improved tidal access required to facilitate any transition or increase of marine and maritime uses.
Kingston Wharf	Established marine and maritime with limited potential to grow and support marine uses

Site	Description
Island Harbour	Residential uses on site have extended to constrain any potential for growth of marine employment uses. Previous potential lost.

The limited prospects available from this category are all below 2ha and in themselves insufficient to support improvement in the infrastructure requirements. Expansion of marine and maritime uses on these sites will be constrained to smaller scale uses that can work within the constraints present on the site.

5 SUMMARY

The updated assessment herein identifies a total of 44.7ha of potential marine employment land coming forward within the 2040 timeframe. Within the Appendix aerial images of the sites providing the currently assessed land supply are provided. Sites with no currently assessed prospect are not included within the Appendix. The precise boundaries and areas are indicative. The split of that potential supply is as outlined in Table 5-1:

Table 5-1 Potential Marine Employment Land Supply (2023-2040)

Category	Potential Supply (ha)
Tier 1 - Potential to transition	10.1ha
Tier 2 – grow existing use	8.8ha
Previously excluded sites	20.9ha
Secondary and Tertiary Prospects	4.9ha
Total	44.7ha

The Tipner site continues to provide the best prospect for the expansion of marine and maritime uses, it provides both the most available land and least constraints to development and operation of marine sector uses. This ensures that the site could accommodate the widest range of potential marine and maritime uses when compared to other land supply within the PMA.

There are several sites providing potential for development in the order of 5-6ha. Not only are the site areas reduced but there are a combination of constraints present, e.g. mineral classification; restricted to port use, limited prospect to maximise all-tide access etc. that confirms reduced potential as compared to Tipner.

A significant proportion of the 44.7ha of land supply available (11.6ha) arises from the aggregation of smaller sites less than 2ha. The limited scale of activity will likely be insufficient to support improvement in the infrastructure requirements. Expansion of marine and maritime uses on these sites will be constrained to smaller scale uses that can work within the constraints present on the site.

It is noteworthy that since the 2015 register was prepared several sites have come forward to deliver expanded marine and maritime uses and others have lost the potential. A summary of the main changes to site conditions is provided in Table 5-2:

Table 5-2 Changes in site use/potential

Site	Change	Comment
Lower William Street	+2.9ha	Expanded uses including marine and maritime
Vestas Technology	+3.7ha	Fully occupied by advanced manufacturing
Royal Clarence Yard	+2.2ha	Transitioned to marine and maritime
Centenary Quay	+2.7ha	Partial transition to marine and maritime
Venture Quays	-2ha	Increased marine and maritime
Chapel Riverside	-4.2ha	Lost to residential development
Eling Wharf	+0.8	Increased marine uses on site
Bakers Wharf	+0.5ha	Increased marine uses on site
Dibbles Wharf	+0.3ha	Increased marine uses on site

6 APPENDICES – SITE PLANS

6.1 Tier 1 – Potential to Transition

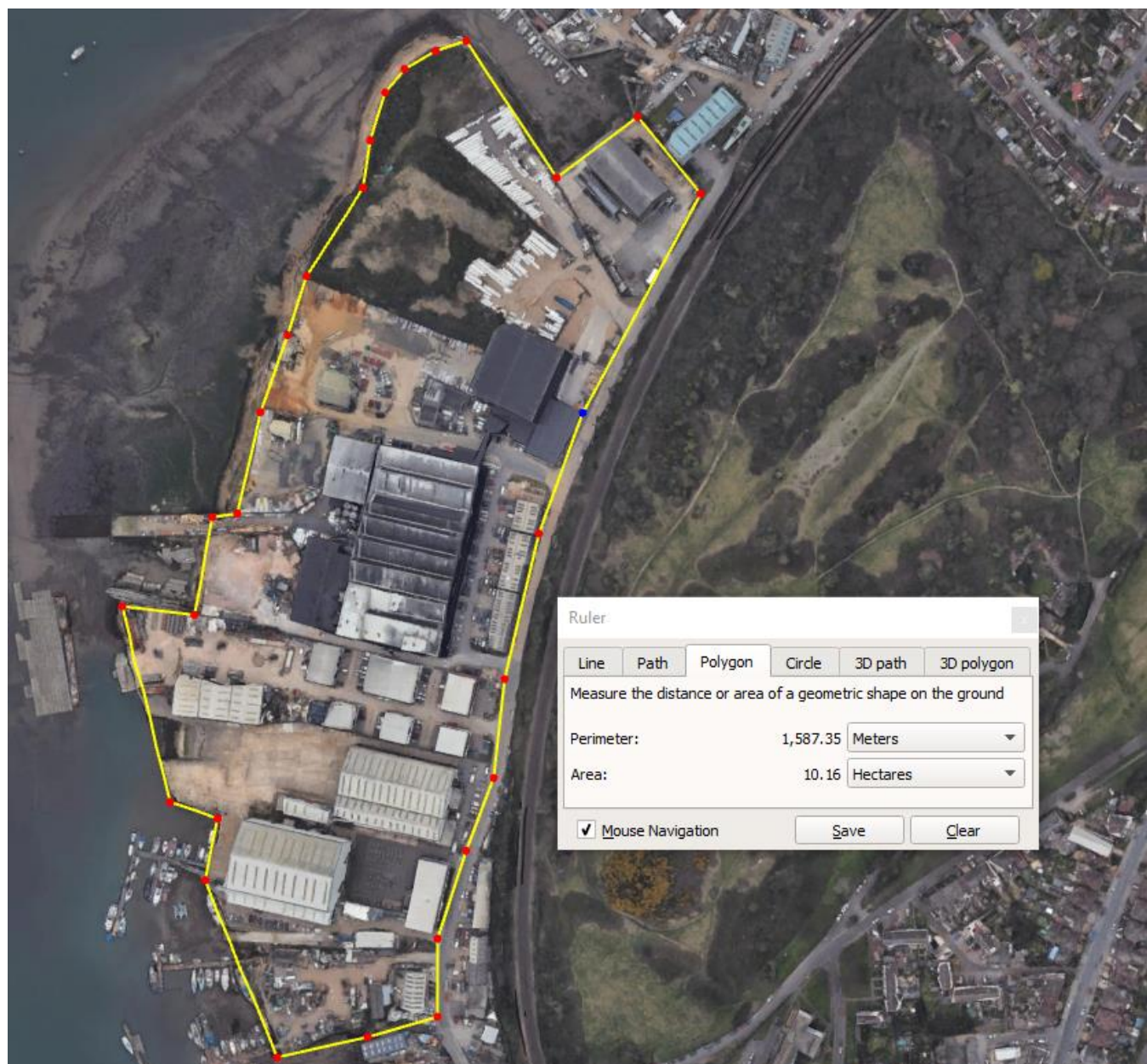


Figure 6-1 Spitfire Quay

6.2 Tier 1 - Existing use with growth prospect

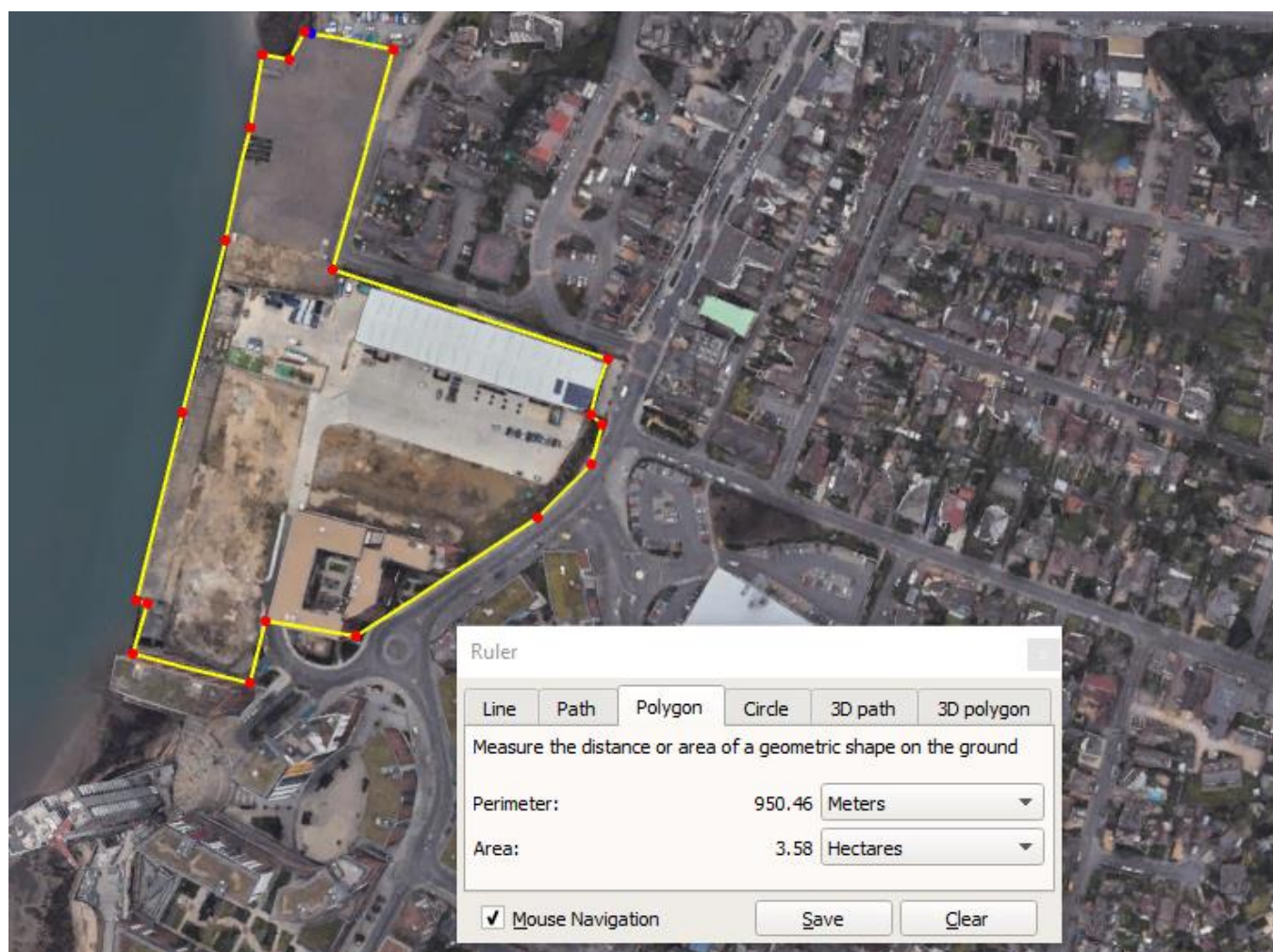


Figure 6-2 Centenary Quay

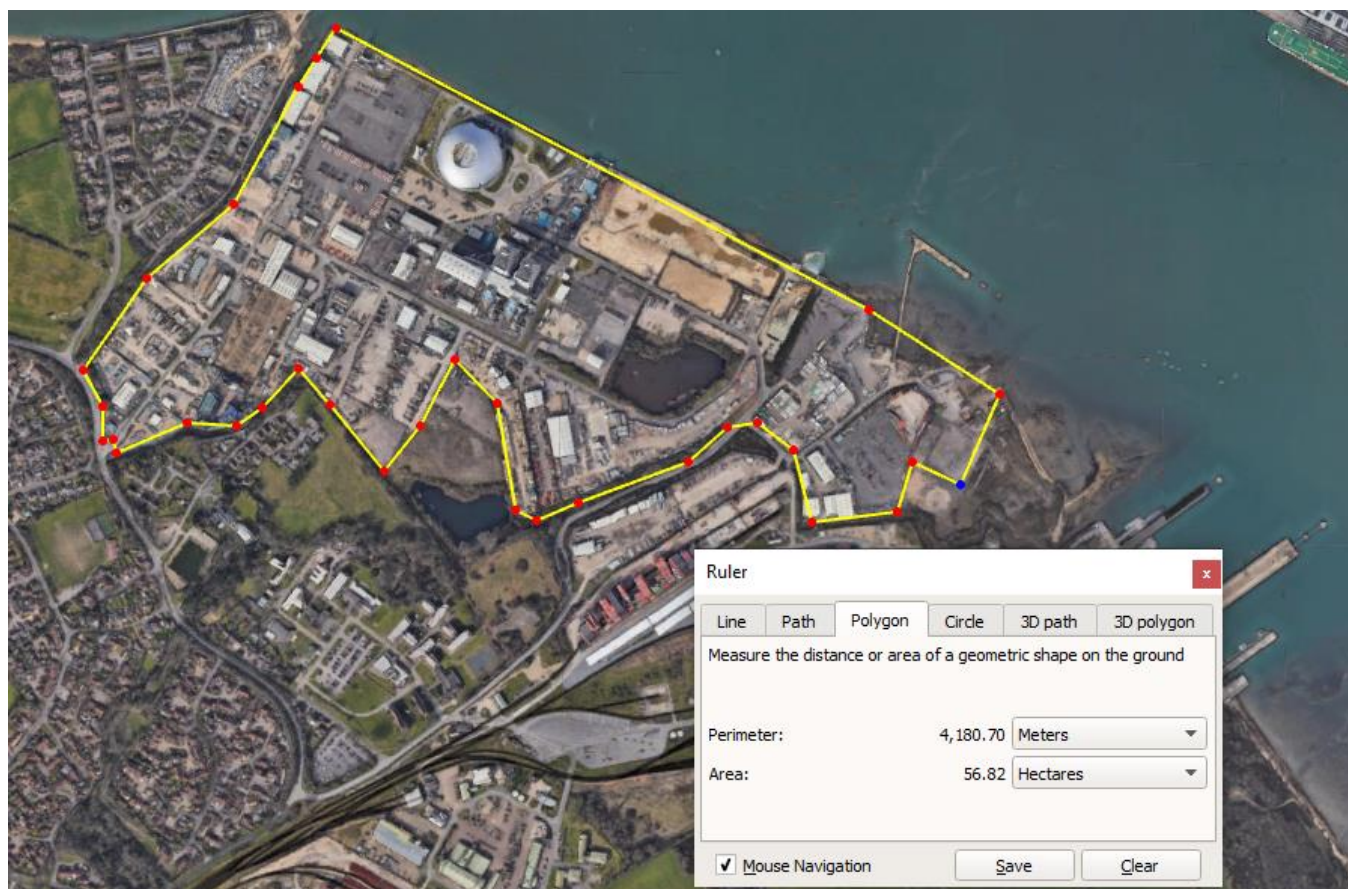


Figure 6-3 Marchwood Industrial Park

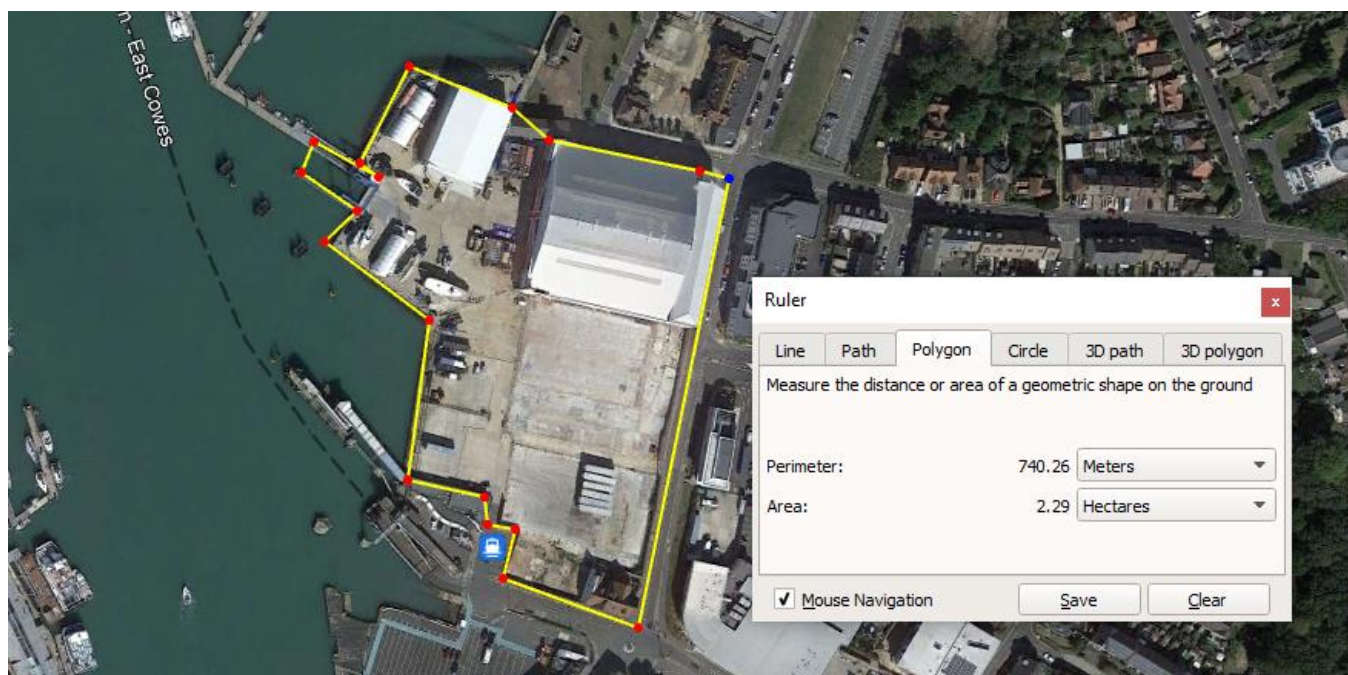


Figure 6-4 Venture Quays

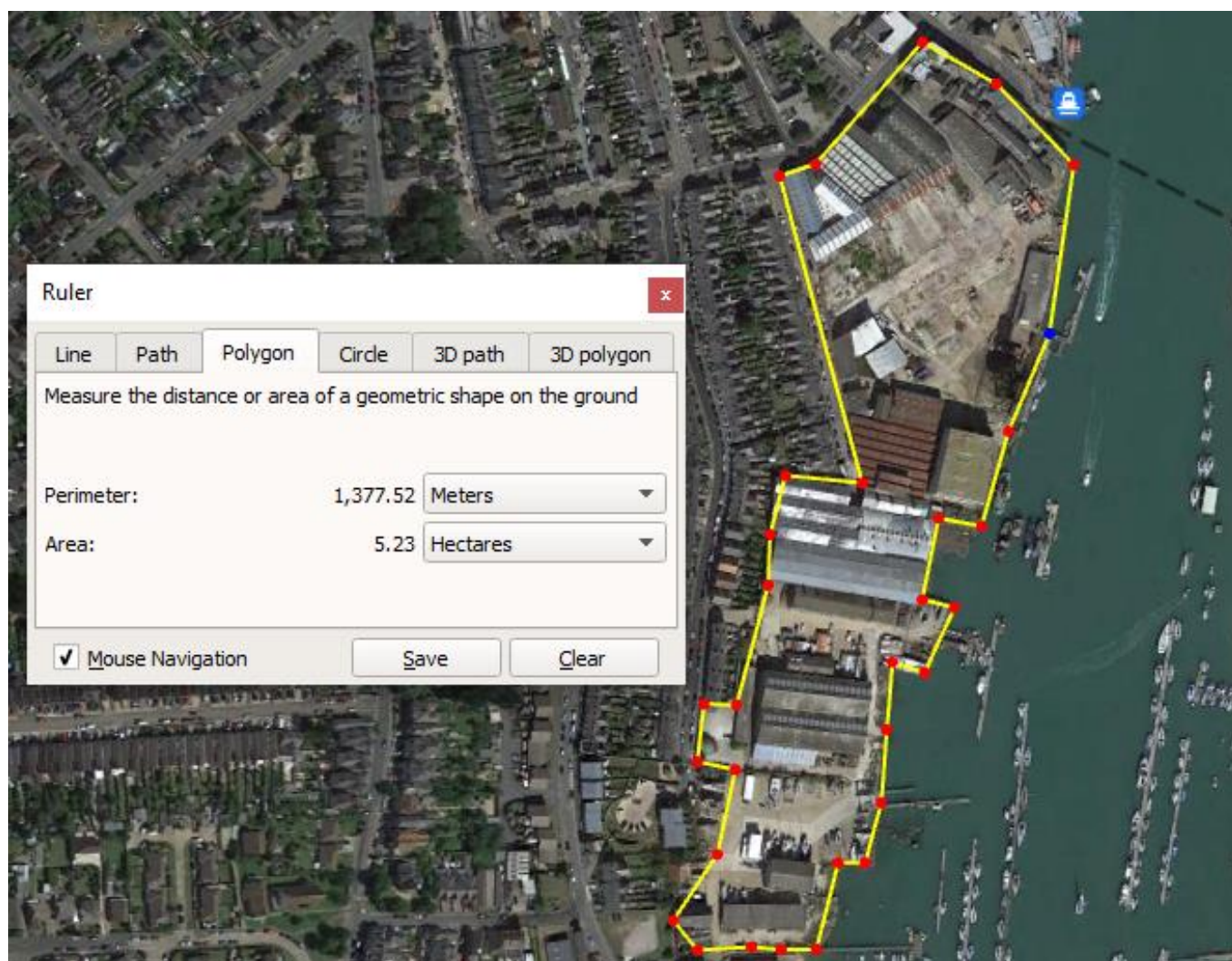


Figure 6-5 Medina Yard

6.3 Excluded Sites



Figure 6-6 Fort Blockhouse 3

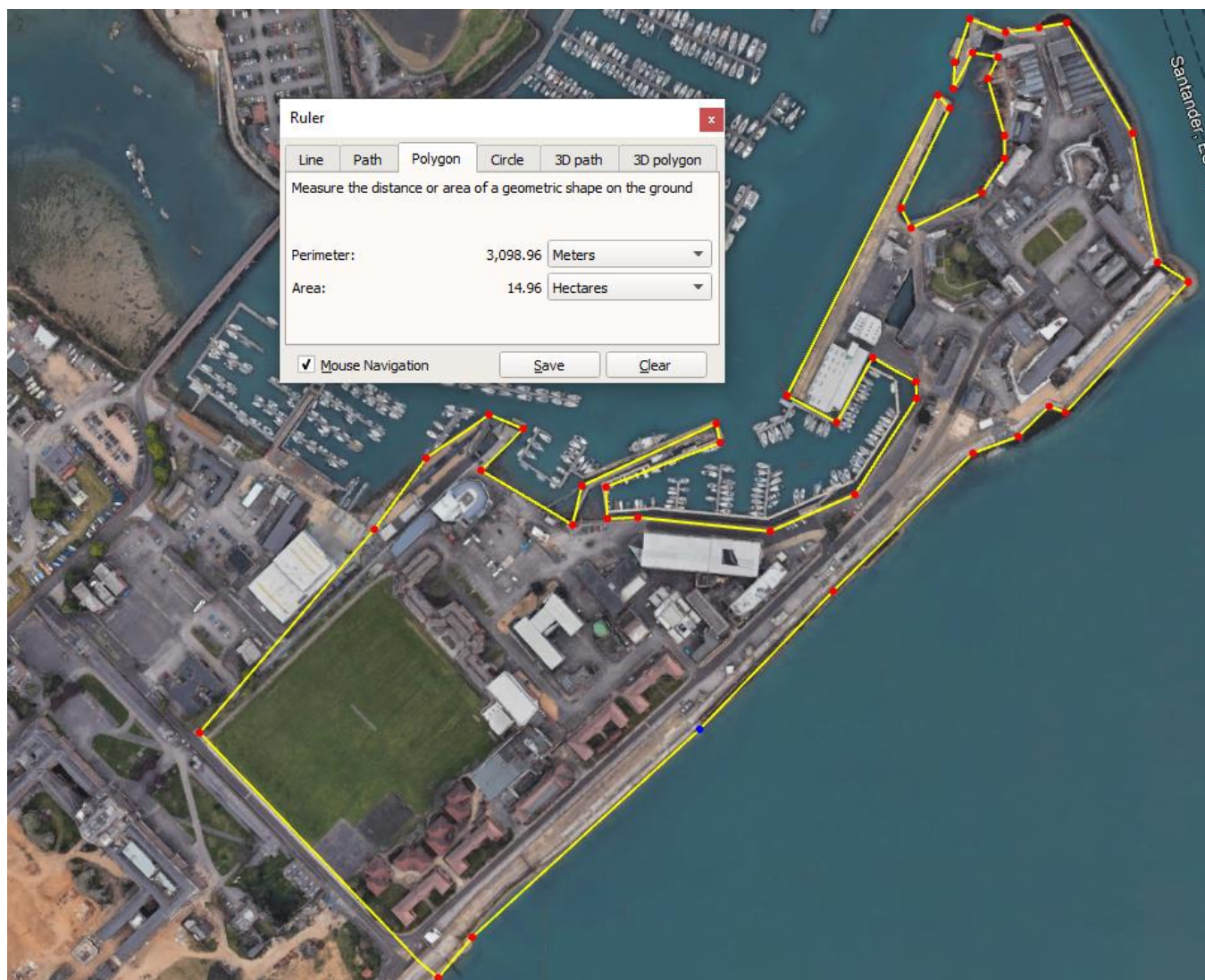


Figure 6-7 Fort Blockhouse 1

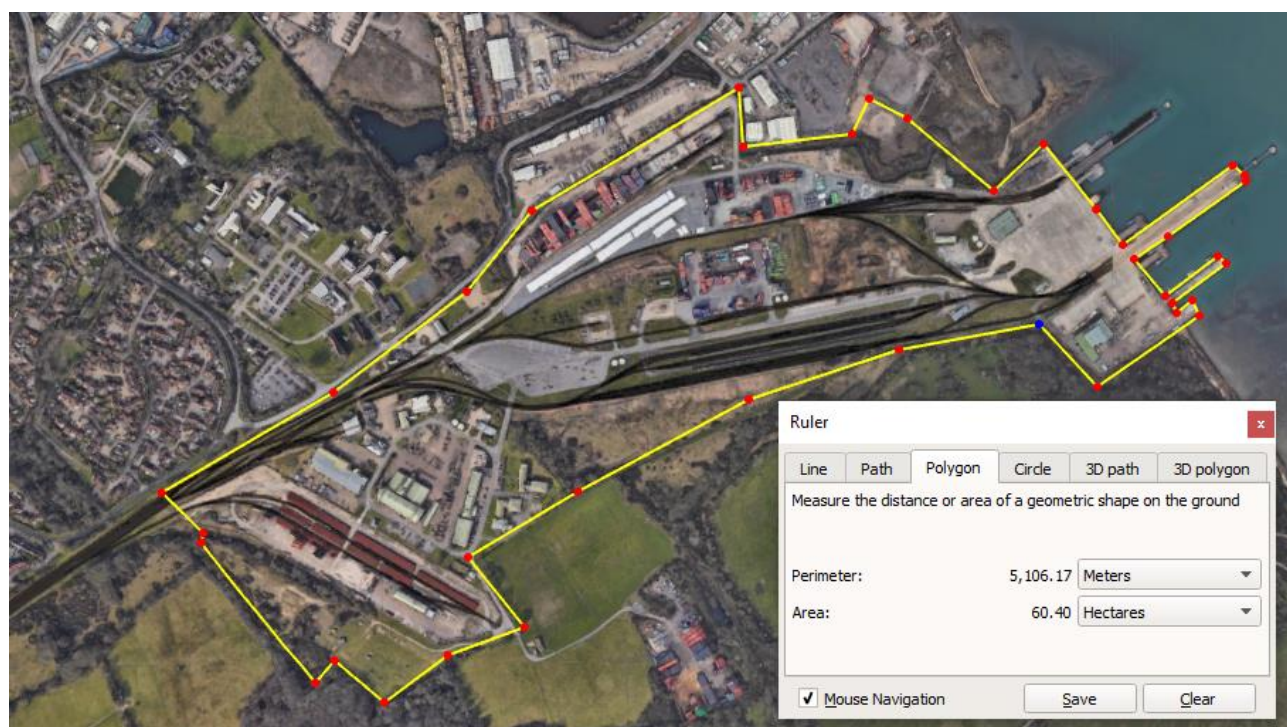


Figure 6-8 Marchwood Military Port

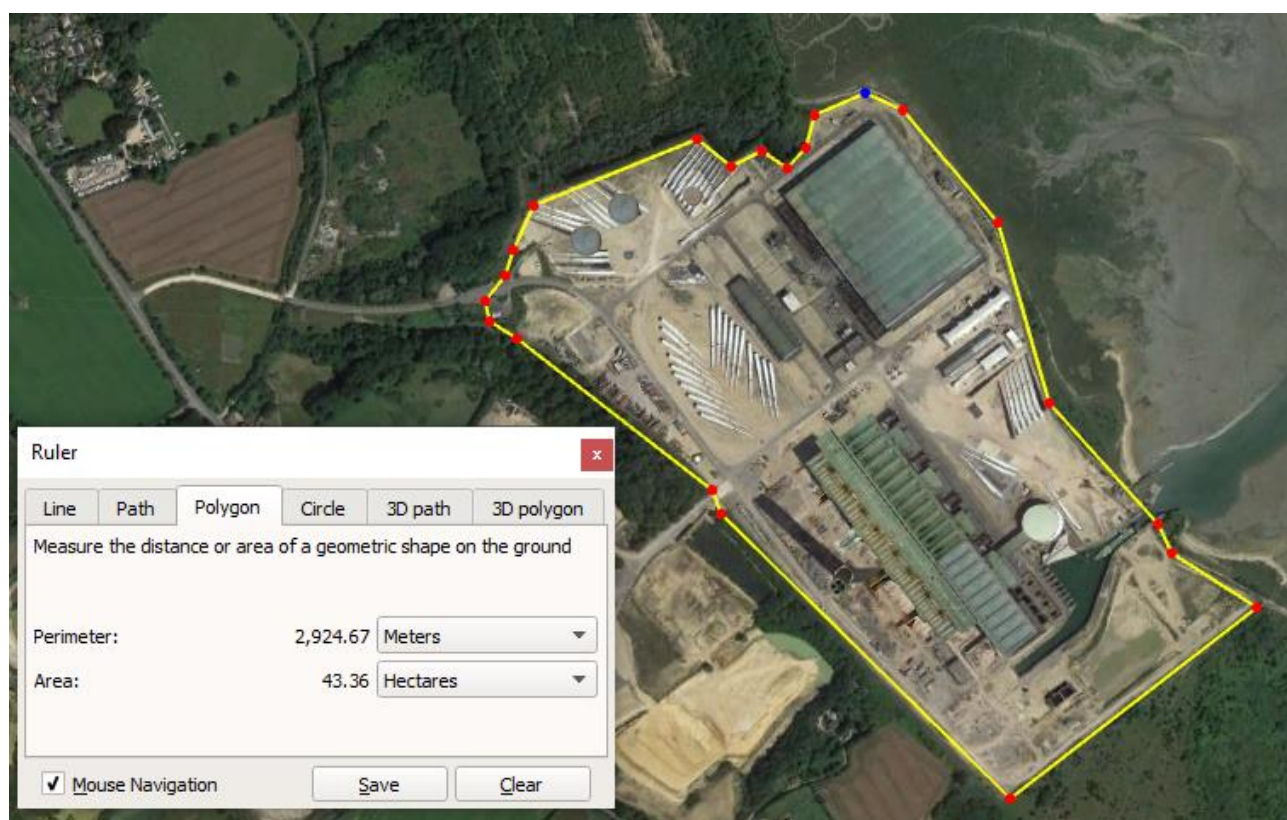


Figure 6-9 Fawley Power Station

6.4 Tier2/3 Sites

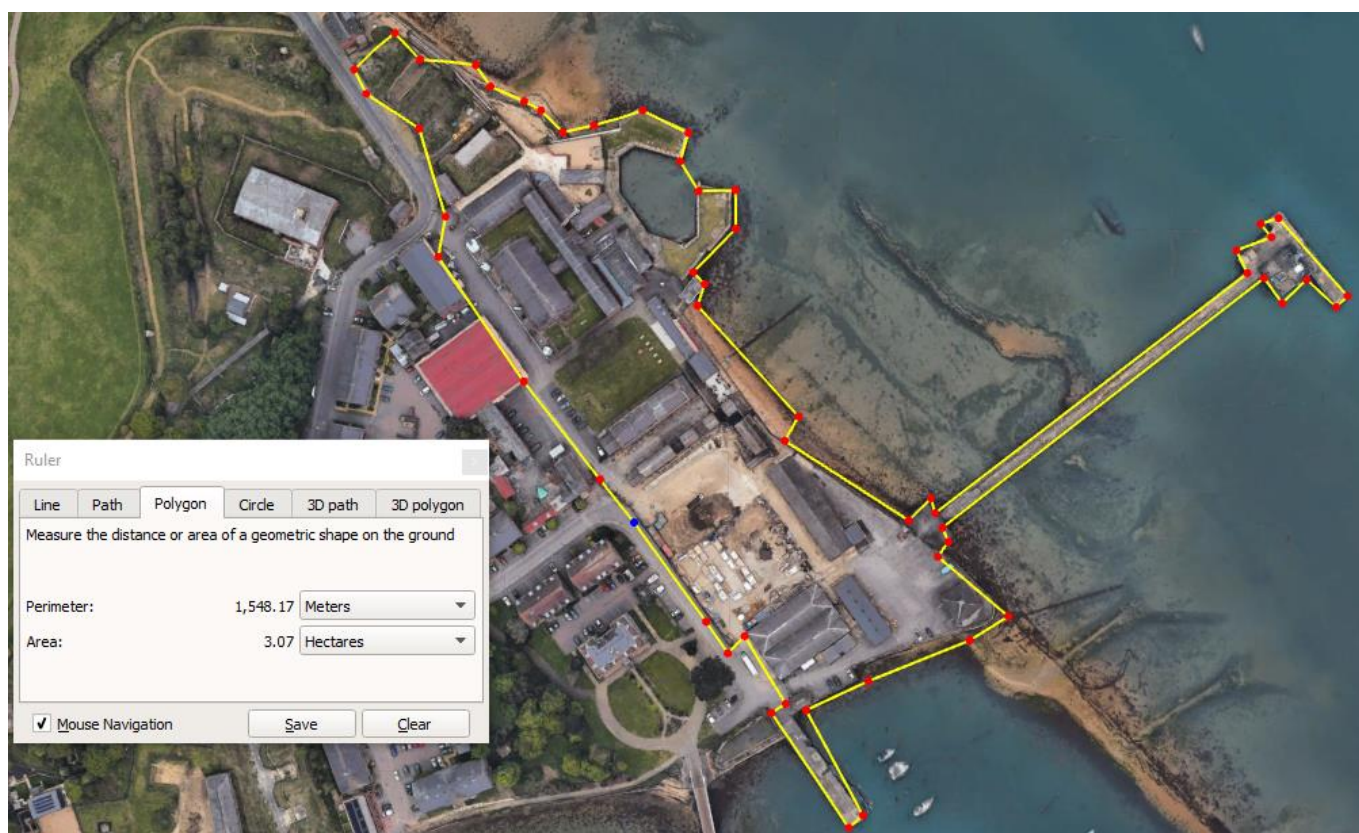


Figure 6-10 Priddy's Hard

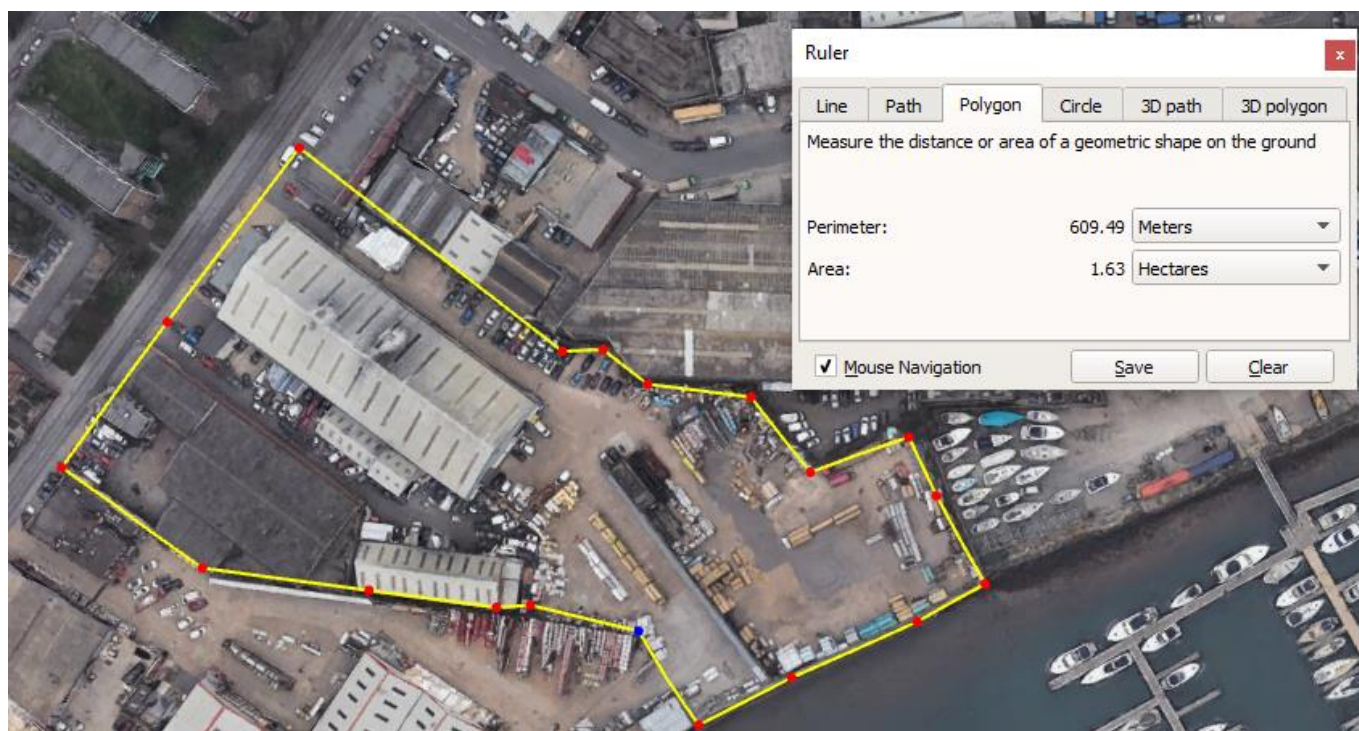


Figure 6-11 Baker's Wharf

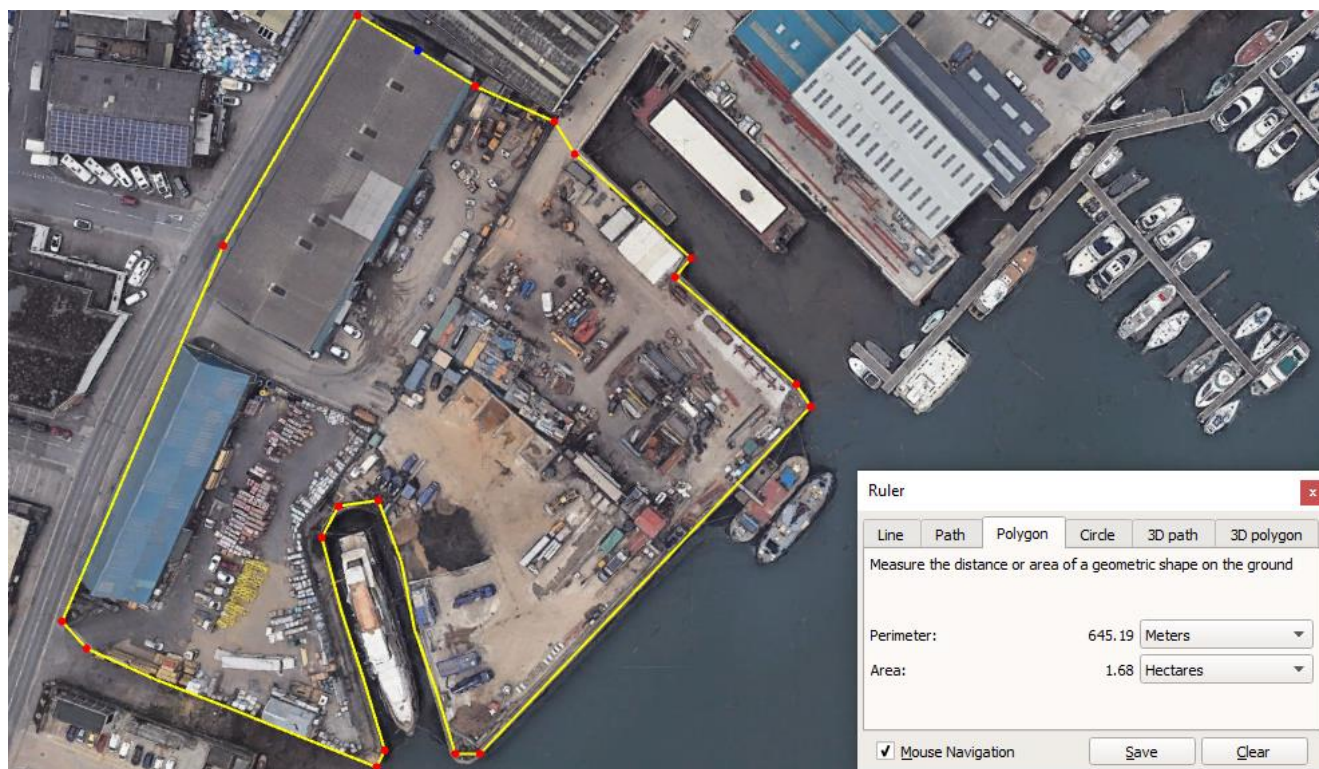


Figure 6-12 Dibbles Wharf

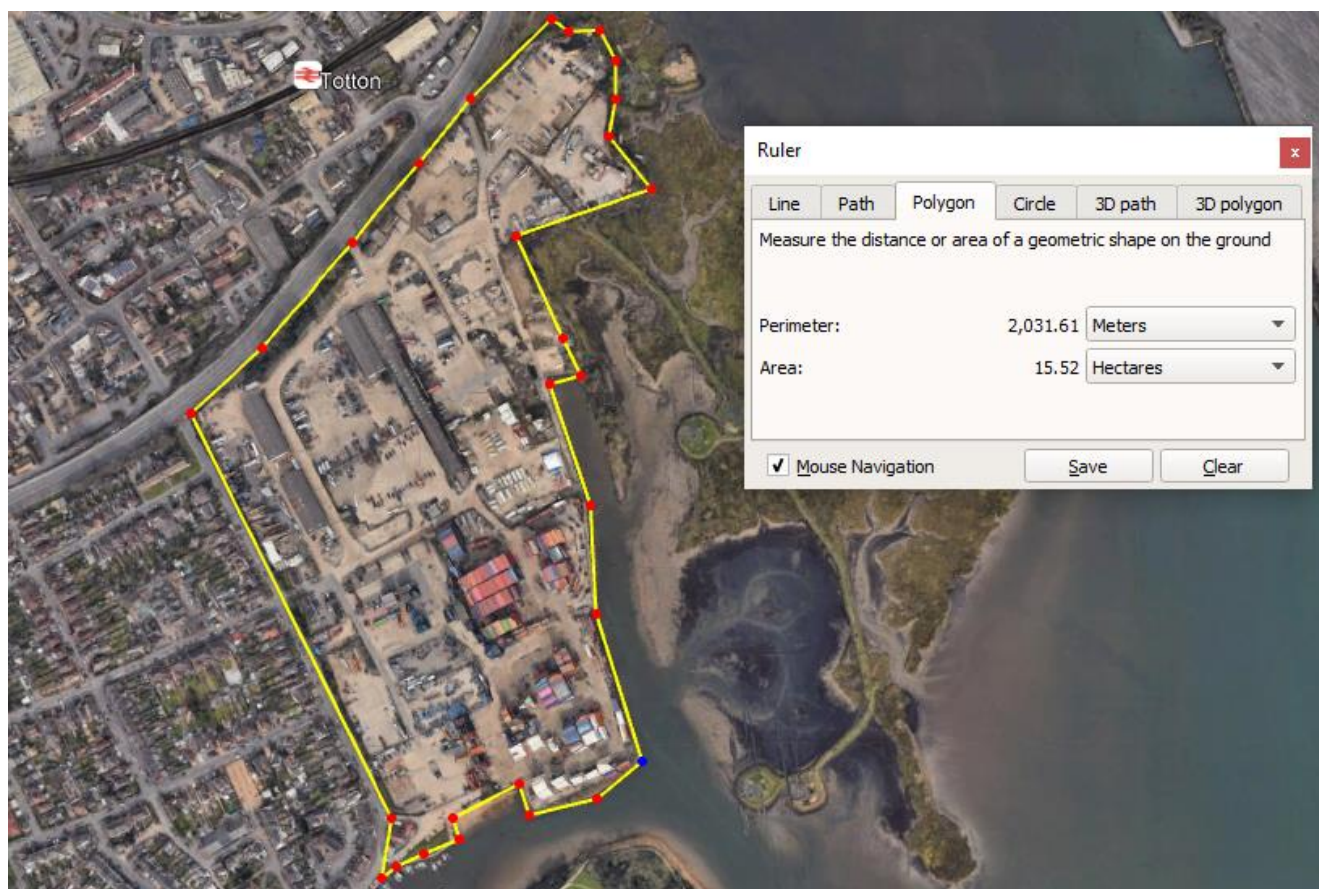


Figure 6-13 Eling Wharf

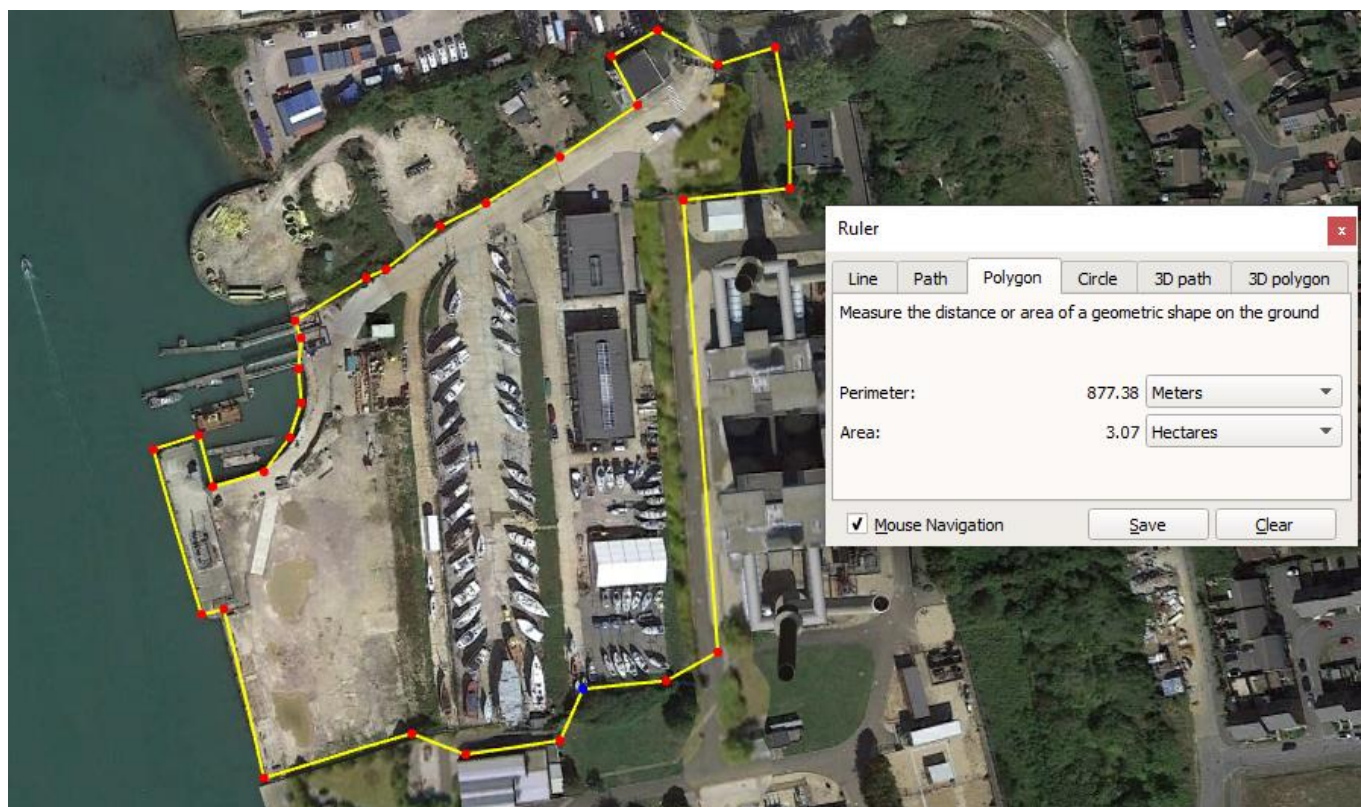


Figure 6-14 Kingston Wharf

MARINA PROJECTS



United Kingdom Office

Marina Projects Ltd

Universal Marina,
Crangleck Lane,
Sarisbury Green,
Southampton, SO31 7ZN
United Kingdom

Tel +44 (0)23 9252 6688

enquiries@marinaprojects.com

Hong Kong Office

Marina Projects Ltd

12/F, Infinitus Plaza
199 Des Voeux Road Central,
Sheung Wan,
Hong Kong

Tel +852 3796 3533

Cyprus Office

Marina Projects Ltd

1, C. Skokou,
Capital Chambers,
5th floor, 1061 Nicosia,
Cyprus

Tel +357 97714495

www.marinaprojects.com



SETTING THE WORLD STANDARD IN MARINA DESIGN