

Agenda Item No: 12
Report To: CABINET
Date of Meeting: 7th December 2017
Report Title: East Kent Growth Framework 2017 - 2027
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Portfolio Holder Cllr. Gerry Clarkson
Portfolio Holder for: Leader of the Council



Summary: This report summarises the East Kent Growth Framework (EKGF) 2017-2027, prepared for the East Kent Growth Board by Litchfields alongside an officer working-group from the 6 Local Authorities. The EKGF updates the 2013 East Kent Growth Plan, and sets out an overarching strategic approach for identifying investment priorities to achieve long-term economic growth across East Kent between 2017 and 2027.

This report describes the four key objectives of the EKGF, the 4 critical nationally significant investment priorities and the projects identified within the Borough of Ashford that will address these objectives to have the greatest long-term impact on the growth of the area. The EKGF will be used to feed into the Kent and Medway Economic Partnership (KMEP) and South East Local Enterprise Partnership (SELEP) Strategic Economic Plans and support future potential funding bids to SELEP, Government programmes and other regional and national funding sources.

Key Decision: No

Significantly Affected Wards: All wards

Recommendations: **The Cabinet is recommended to:-**

- I. Note the contents of the East Kent Growth Framework and associated documents.**
- II. Endorse the East Kent Growth Framework as the strategic document setting out the key investment priorities for the growth of East Kent.**

Policy Overview: The EKGF incorporates many of the economic development priorities of Ashford Borough in a sub-regional context, and therefore will help deliver a number of the objectives and projects detailed in the Corporate Plan 2015-2020. The Framework also complements the emerging Local Plan for

Ashford Borough, supporting the key critical infrastructure, housing and commercial developments required to deliver this plan.

Financial Implications: None

Legal Implications -

Equalities Impact Assessment Not Required

Other Material Implications: None

Exempt from Publication: No

Background Papers: **Appendix A - East Kent Growth Framework Final Draft Report (East Kent Growth Board)**
Appendix B – East Kent Growth Framework Evidence Report (Lichfields)
Appendix C – DRAFT East Kent – The Gateway to UK plc.

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Report Title: East Kent Growth Framework 2017-2027

Introduction and Background

1. Following East Kent's success in attracting South East Local Enterprise Partnership, Local Growth Funds, through the development of the 2013 East Kent Growth Plan, and with the proposed revision of the South East Strategic Economic Plan, the East Kent Growth Board commissioned the production of a new East Kent Growth Framework. This East Kent Growth Framework (EKGF) has been prepared to set out an overarching strategy and clear investment priorities for achieving long-term sustainable economic growth across East Kent between 2017 and 2027. The Framework incorporates the five East Kent districts of Ashford, Canterbury, Dover, Shepway and Thanet.
2. This new framework builds on a strong track record of the East Kent local authorities working together to plan for and execute investment across their boundaries while developing complementary initiatives to deliver growth. This Framework represents a strong commitment that this will continue, leading the way in building a stronger and more productive economy as envisaged by the Government's emerging Industrial Strategy, and making a significant contribution to achieving the growth ambitions of the South East Local Enterprise Partnership.
3. The new Framework document appended to this report as Appendix A, is supported by a background evidence report (Appendix B), which provides an economic assessment of East Kent and each of the 5 district/borough areas. To support the communication of the priorities established within these documents, the East Kent Growth Board are also developing a document "East Kent – Gateway to UK Plc" (which is in its draft form in Appendix C to this report). This document will help portrait the key priorities of the Framework to the SELEP, central government and other partner organisations to ensure critical investment is secured for these priorities.
4. The five districts are a significant economic sub-region accommodating about 279,000 jobs, equivalent to about a third of the Kent total. The economy has expanded rapidly since the late 1990s, growing by over 20%, which matched the rest of Kent. The significant growth in employment within the area has taken place within the Borough of Ashford, with 47% growth in employment over the last 19 years.
5. As a region East Kent is experiencing fast population growth, outpacing the rest of Kent and the wider South East. Ashford is a key driver in particular due to strong housing growth over a sustained period of time. The borough is attracting a growing cluster of young professionals and families and has opportunities to encourage greater working-age population growth through planned developments and regeneration.
6. The East Kent economy supports a diverse business base across a wide range of activities, and has performed strongly in terms of growth of higher-

value sectors such as professional services, finance and information communications and technology. There is real diversity of sector strengths, which gives East Kent both a range of complementary activities but also added resilience when it is considered as a single economic sub-region. The Framework therefore advocates an approach that supports the development of complementary sector specialisms across different parts of East Kent. For Ashford, the key sectors are advanced manufacturing, life sciences, and ICT. Despite the significant growth over the past few decades, East Kent still has significant challenges compared to other areas of the South East, and more importantly has significant opportunity for increased productivity and growth over the next 10 years.

7. The East Kent Growth Framework is intended to set out an overall direction of travel within the region to maximise economic opportunities and to help address the challenges and issues it faces. It identifies 4 key objectives, and from these a range of 75 individual projects – 38 strategic and 37 locally significant - which relate to these framework objectives and will enable the areas ambitions for growth to be realised. Together these could deliver over 47,000 new direct and indirect jobs (equivalent to 16% of the total number of jobs in East Kent in 2016) and more than 86,000 new homes to East Kent.

East Kent Growth Framework 2017-2017

8. The Framework recognises East Kent's critical role as the Gateway to UK plc, with approximately 40% of UK trade with the EU passing through this area each year. The Framework sets out the critical investments needed to ensure not only the growth of East Kent, but also the continued productivity of UK businesses exporting to or importing from the EU.
9. The Framework is intended to complement existing strategies and to help inform new ones as they emerge. It reflects the existing aspirations of Ashford Borough Council, for example through the council's Corporate Plan 2015-2020, and the draft Local Plan and supporting draft Infrastructure Plan. The Framework elevates the strategic housing and commercial developments and infrastructure requirements from the individual Local Plans through a bottom up approach.
10. The Framework brings together the critical priorities from the 5 East Kent local authority areas, to help to co-ordinate bids to available funds such as the Local Growth Fund, Housing Infrastructure Funds, and provides a platform within which to consider the allocation of potential future 100% business rates retention to stimulate further development of housing and commercial space.
11. The EKGF draws on the government's emerging Industrial Strategy and contextualises it specifically in respect of East Kent's economic strengths and opportunities.
12. The Framework has four key Objectives:

Objective 1: Unlocking growth through infrastructure - identified sites for development need effective transport and digital infrastructure and targeted upgrading of our road and rail networks (particularly High Speed 1) will enhance domestic and international connectivity.

Objective 2: Delivery of business space - high quality flexible modern commercial space is needed in the right locations to support our existing businesses while attracting new investors.

Objective 3: Supporting skills and productivity within business - creating an environment for innovation in productivity and the creation of talent will strengthen the area further.

Objective 4: Place making and shaping - East Kent will be a location of first choice that retains and attracts young people, families and entrepreneurs, while at the same time maximising the potential of the natural assets we hold, enhancing our town centres and ensuring a high quality built environment.

Priorities for Investment

13. The Framework identifies four nationally significant investment priorities to ensure the economic prosperity of UK plc, alongside the growth of East Kent:
 1. **Strategic network improvements to A2/M2** - these are required to support the new Lower Thames Crossing, the growth of Canterbury and the ports of Dover and Ramsgate;
 2. **M20/A20 improvements** – supporting the growth of Ashford, Dover and Shepway, including junction 10A, a solution to Operation Stack, HGV overnight parking and access to Dover;
 3. **Improvements to rail capacity, speeds, frequency and associated infrastructure** - including Ashford SPURS, Westenhanger Station enhancement, and Thanet Parkway; and
 4. **A28 corridor artery** – stretching across East Kent from Margate to Ashford via the City of Canterbury, which requires eight separate but connected transport infrastructure projects to improve road links, address bottlenecks and ease problems of congestion.
14. As part of the development of the Framework, a comprehensive review of potential investment projects across East Kent has been undertaken having regard to the existing evidence available and working in close partnership with each of the East Kent local authorities. There are 75 individual projects – 38 strategic and 37 locally significant - which relate to the four framework objectives and will enable growth to be realised. This list includes projects previously identified in the 2013 East Kent Growth Plan which are either underway and may require further support to be fully delivered or have not yet come forward.
15. The projects have been identified based on a local recognition of their importance, rather than a strict, criteria-based scoring process. This recognises the balanced approach to growth defined by the Framework objectives. Identifying priority locations for investment purely based on housing numbers or employment outputs would underplay the importance of smaller-scale projects and other initiatives that will have a longer-term impact on perceptions of the area and its attractiveness to investors.

16. In order to help frame future priorities, a tiered approach has been adopted which differentiates between projects that deliver the four nationally significant priorities identified above, those which are 'strategically significant' (i.e. those important to growth in East Kent overall) and 'locally significant' (i.e. those important to growth in an individual local authority). Nationally significant and Strategically significant projects would generally be afforded greater priority over locally significant projects in gaining the support of the East Kent Growth Board.
17. There are 15 projects that will provide direct positive benefits to the Borough of Ashford, 12 Ashford projects and 3 East Kent projects. These are listed in the table below (and can also be found in the table on pages 29-32 in the East Kent Growth Framework in Appendix A, with more detail on each of these projects on pages 35-39 and 56-57 of the same document):

Project ID	Project Name	Location	Scheme Type	Significance	Alignment with Framework Objective(s)			
					1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
1	Ashford Town Centre Transformation Project:	Ashford	Infrastructure	Strategic	✓			✓
2	<i>Ashford Commercial Quarter</i>	Ashford	Mixed	Strategic		✓	✓	✓
3	<i>Ashford College Campus</i>	Ashford	Mixed	Strategic	✓	✓	✓	✓
4	<i>Elwick Place</i>	Ashford	Mixed	Local			✓	✓
5	<i>Southern Expansion Quarter / Victoria Way</i>	Ashford	Mixed	Local	✓	✓	✓	✓
6	Jasmin Vardimon	Ashford	Commercial	Local		✓	✓	✓
7	Ashford Designer Outlet Expansion	Ashford	Commercial	Strategic		✓	✓	✓
8	Chilmington Green	Ashford	Mixed	Strategic	✓	✓	✓	✓
9	M20 Junction 10a	Ashford	Infrastructure	Strategic	✓		✓	
10	Ashford International Station	Ashford	Infrastructure	Strategic	✓		✓	
11	Newtown Works	Ashford	Mixed	Local	✓	✓	✓	✓
12	Conningbrook housing and water park	Ashford	Mixed	Strategic	✓			✓
...				
68	East Kent Increased rail capacity and journey times	East Kent	Infrastructure	Strategic	✓		✓	✓
69	Business funding support – Kent & Medway Business Fund	East Kent	Infrastructure	Strategic			✓	
70	Upgrading broadband	East Kent	Infrastructure	Strategic	✓		✓	✓

Place	Total projects	Strategically significant	Locally-significant	Alignment with strategic objective(s)			
				1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
Ashford	12	8	4	8	7	10	10
Canterbury	17	7	10	12	7	19	4
Dover	11	5	6	6	5	11	7
Shepway	13	7	6	10	9	6	6
Thanet	14	6	8	6	5	9	7
East Kent wide	3	3	0	2		3	6
Total	70	36	34	44	33	58	39

18. The tables above show that 8 of the 12 Ashford projects have been classified as strategic, providing benefit beyond just the boundaries of Ashford Borough, with all 3 East Kent projects also being classified as Strategic. The projects above incorporate the Big 8 projects for Ashford, but also introduce emerging priorities such as Newtown Works and Conningbrook housing and water park.
19. Within the wider list of all East Kent projects, it should also be noted that recent changes with the withdrawal of the Government's plans to take forward the M20 Lorry Area at Stanford West, which was planned to mitigate

Operation Stack, this demonstrates that the project list will need to be regularly updated to reflect the delivery of some projects, and the emergence of new projects within the area. The Framework therefore provides a strategic focus to the priority themes and areas for investment, and the priority projects at the time of publishing this document, but that this project list will change over time.

Implications and Risk Assessment

20. The EKGf provides a basis for collaborative growth over the next decade. Ashford will need to work positively internally and with partners to achieve successful outcomes or risk missing the opportunity for public sector investment to enable transformational growth.
21. A key challenge for the development of the East Kent Growth Framework will be to strike a balance between supporting successful locations to continue to grow and supporting poorer performing areas to 'catch up' and bridge the growing gap.
22. It is also important to recognise that the strengths and weaknesses of one location can represent opportunities and threats to others areas, and so it will be important for Ashford to remain cognisant of neighbouring activity. The continued partnership working provided by this East Kent Growth Board and this Framework will assist with this process.

Equalities Impact Assessment

23. Not applicable

Consultation Planned or Undertaken

24. Not applicable

Other Options Considered

25. The EKGf is the result of collaborative work between Ashford Borough Council and its partners. An Evidence Report produced by consultants Lichfields provided a basis for examining the potential investment priorities across the region by determining how the different locations in East Kent play to their strengths and opportunities in a way that supports the development of the whole area.
26. A number of workshops with the East Kent Growth Board and officers from the 6 Local Authorities and partner organisations have been undertaken to consider the options for the direction of this Framework and to help shape these final documents.

Reasons for Supporting Option Recommended

27. The EKRF reflects and complements Ashford's priorities for growth and provides a framework for developing them in a sub-regional context. It has been developed by officers of the authority in partnership with those of the neighbouring authorities and recognises those projects that are key to Ashford's future successful growth.
28. The potential impact on the East Kent economy if all 75 projects are delivered is significant. Based on information (where known), in combined terms the projects represent the potential to generate or unlock:
 - About 47,000 direct and indirect jobs, equivalent to 16% of the total number of jobs in East Kent in 2016
 - Capacity for over 85,000 dwellings
29. To bring these projects to fruition and to achieve the growth ambitions for East Kent, there is a need to work in partnership to ensure the promotion of projects in a competitive funding environment. This includes working with the private sector, to bring forward housing and employment sites, infrastructure and other initiatives, Further and Higher Education providers to deliver skills infrastructure and training, and agencies including Locate in Kent that promotes our area and support inward investment. National Government also has a key role to play, particularly in providing public sector investment to ensure that our infrastructure works effectively, not only for the benefit of East Kent to realise our growth ambitions, but also to support the wider UK economy due to the crucial role East Kent plays as an international gateway for UK plc.

Next Steps in Process

30. The East Kent Regeneration Board will meet to consider the final documents on the 13th December 2017, with the 5 Local Authorities of East Kent seeking endorsement of these documents through their own Council processes. Once endorsement has been achieved, these documents will be used to work with East Kent MPs to promote the investment requirements of East Kent to the SE LEP and central government departments, and will be used to support future bids for funding.

Conclusion

31. The East Kent Growth Framework sets out an overarching strategic approach for identifying investment priorities to achieve long-term economic growth across East Kent between 2017 and 2027. It builds on the successes of attracting public sector investment into East Kent through the 2013 East Kent Growth Plan.
32. The Framework sets out the four key objectives of: 1) Unlocking growth through infrastructure; 2) Delivery of business space; 3) Supporting skills and productivity; and 4) Place making and shaping. With "Unlocking growth through infrastructure" prioritised, the Framework identifies four critical nationally significant investment priorities that elevate East Kent's role as the Gateway to UK plc, these are; 1) Strategic network improvements to A2/M2; 2) M20 / A20 improvements; 3) Improvements to rail capacity, speeds,

frequency and associated infrastructure; 4) A28 corridor artery. These support the required infrastructure for Ashford's growth and present a strong combined case for investment.

33. The Framework provides support for the Ashford Big 8 projects, as well as the emerging corporate priorities for investment to support the prosperity of the Borough. It also sets the Framework to promote future funding bids and development proposals to help Ashford achieve significant growth with the support of other East Kent districts and Kent County Council.

Portfolio Holder's Views

34. Cllr Gerry Clarkson – Leader of Ashford Borough Council:

“Clearly this is a very important piece of strategic work that integrates all the projects and categorises their importance, enabling East Kent authorities to work collaboratively in supporting future funding bids. It is clear that Ashford figures as an important contributor to the ongoing prosperity of East Kent, and as the facts show, Ashford is at the forefront of significant local and hugely important strategic projects.”

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East Kent Growth Framework Final Draft Report

East Kent Regeneration Board

September 2017

Executive Summary

East Kent is a significant economic sub-region. The area combines a distinctive and unique blend of international connectivity, proximity to London and mainland Europe, world-class education institutions, incredible coastal assets and a rapidly-expanding base of high growth sectors which provide a strong platform for future growth. It accounts for a third of all jobs in Kent, and since the late 1990s has been one of the fastest growing areas in South East England. Recent house building growth coupled with the lifestyle attractions of vibrant historic towns, outstanding countryside, heritage assets and coastal areas mean that increasing numbers of people are choosing to invest in and call East Kent home. East Kent is of national significance because it has leading infrastructure such as the High Speed 1 rail network, Channel Tunnel, Port of Dover and Port of Ramsgate. We are the gateway location that links the UK with continental Europe.

Considerable progress has been made over the last few years to deliver against the various strategic priorities and locations identified in the 2013 East Kent Growth Plan, with a combination of private and public sector investment helping to bring forward a range of significant development projects.

Looking over the next 20 years, East Kent is expected to generate 36,500 new jobs according to the latest forecasts and increase economic output by over 50% from current levels. The working-age population of East Kent has been expanding more rapidly than other parts of Kent and the South East over recent years. There is even greater potential for increased economic output given the major opportunities to support new housing and employment growth that have been identified across a range of strategic well connected sites. These sites will give the space for new communities and businesses to grow, and create innovation and productivity enhancements across the economy. Realising this potential represents an economic dividend not just for East Kent but the wider national economy. This potential can be realised with targeted investment in resources to help address current and future challenges along the way.

In this context, the East Kent Growth Framework (EKGF) sets out an overarching strategic approach for identifying investment priorities to achieve long-term economic growth across East Kent between 2017 and 2027. The Framework incorporates the five East Kent districts of Ashford, Canterbury, Dover, Shepway and Thanet. It represents a commitment to collective working that has yielded past success and recognition that a collaborative approach will maximise the potential impact of East Kent in a way that is greater than the sum of its parts. This will include working with neighbouring areas, the private sector and public agencies to support strategic investment outside the immediate boundaries of East Kent. There are inherent inter-dependencies within and beyond East Kent in terms of how people move about, corridors of infrastructure, and importantly where businesses access their workforce and supply chains. Our framework reflects and draws on these critical functional economic relationships.

We have defined four key objectives as the ‘building blocks’ for driving continued and sustained growth and focusing future investment across East Kent on this basis. They are not intended to operate in isolation but are complementary and self-reinforcing:

- 1 **Unlocking growth through infrastructure** – identified sites for development need supporting transport and digital infrastructure particularly targeted upgrading and making better use of our road and rail networks (particularly High Speed 1) to enhance domestic and international connectivity while enabling local accessibility.
- 2 **Delivery of business space** – we want to deliver the next-generation of modern commercial space for our business start-ups, encouraging existing businesses to scale-up, and to help attract new mobile investment into the area while driving forward the development of our brownfield sites.
- 3 **Supporting skills and productivity within business** – creating an environment for innovation in productivity improvements, supporting businesses to grow and move up the value chain, encouraging faster broadband, ensuring that businesses have the skills to grow and that our skills

base continues to improve is linked to the success of our higher education and further education sectors creating talent.

- 4 **Place making and shaping** – East Kent is a fabulous place to live, work, holiday and invest. We want to improve the perception of people’s idea of East Kent and make it a location of first choice that retains and attracts young people, families and entrepreneurs, while at the same time maximising the potential of the natural assets we hold, enhancing our town centres and ensuring a high quality built environment.

Of these four key objectives, **unlocking growth through infrastructure** is considered to be the most important and focuses on securing delivery of critical infrastructure projects, working with industry bodies and other agencies where necessary. The importance of infrastructure investment is well recognised and the ICE Autumn statement¹ identifies that for every £1 spent on infrastructure construction economic activity nationally is raised by £2.84²; this investment provides a strong economic stimulus with a multiplier effect that can help support local growth.

We have identified a total of 75 individual projects in East Kent that will address these objectives and have the greatest long term impact on the area and its attractiveness to investors. Half (38) of these projects are therefore regarded as ‘strategically significant’ which means their delivery will have positive impacts across the whole of East Kent and beyond (see Table ES1.1); they are afforded greatest priority for future investment. These include a number of major infrastructure and development projects. The current status and funding position of these projects varies and will evolve over time.

In combined terms, based on available information, the potential impact of delivering all of the **strategically significant projects** identified across East Kent represents:

- **Over 36,000 direct jobs** once operational; and
- **Capacity for over 73,000 dwellings** either directly or via associated development.

Table ES1.1 Strategically-significant projects in East Kent (shown alphabetically by local authority area)

	Project	Area		1. Unlocking growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
1	Ashford Town Centre Transformation Project:	Ashford	Strategic	✓			✓
2	<i>Ashford Commercial Quarter</i>	Ashford	Strategic		✓	✓	✓
3	<i>Ashford College Campus</i>	Ashford	Strategic	✓	✓	✓	✓
4	<i>Elwick Place</i>	Ashford	Local			✓	✓
5	<i>Southern Expansion Quarter / Victoria Way</i>	Ashford	Local	✓	✓	✓	✓
6	Jasmin Vardimon	Ashford	Local		✓	✓	✓
7	Ashford Designer Outlet Expansion	Ashford	Strategic		✓	✓	✓
8	Chilmington Green	Ashford	Strategic	✓	✓	✓	✓
9	M20 Junction 10A	Ashford	Strategic	✓		✓	
10	Ashford International Station	Ashford	Strategic	✓		✓	

¹ ICE Autumn Statement November 2016

² Civil Engineering Contractors Association http://www.ceca.co.uk/media/103459/ceca_cebr_report_-_securing_our_economy_the_case_for_infrastructure_-_may_2013.pdf

	Project	Area		1. Unlocking growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
11	Newtown Works	Ashford	Local	✓	✓	✓	✓
12	Conningbrook housing and water park	Ashford	Strategic	✓			✓
13	Canterbury Knowledge City:	Canterbury	Strategic	✓	✓	✓	✓
14	<i>Kent Medical School & Research Complex</i>	Canterbury	Strategic		✓	✓	
15	<i>Canterbury Innovation Centre II</i>	Canterbury	Local		✓	✓	
16	<i>"Makers Space" and "Hot House"</i>	Canterbury	Local		✓	✓	
17	<i>Canterbury Christ Church University EDGE Project</i>	Canterbury	Strategic		✓	✓	
18	<i>Herne Bay Business Centre</i>	Canterbury	Local		✓	✓	
19	A28 Corridor:	Canterbury	Strategic	✓		✓	
20	<i>Milton Manor Roundabout</i>	Canterbury	Local	✓		✓	
21	<i>A2 slip at Bridge</i>	Canterbury	Local	✓		✓	
22	<i>A2 offslip and park & ride relocation</i>	Canterbury	Local	✓		✓	
23	<i>Wincheap Traffic Management Scheme</i>	Canterbury	Local	✓		✓	✓
24	<i>Sturry Link Road</i>	Canterbury	Strategic	✓		✓	
25	<i>Sturry Rd Integrated Transport Package</i>	Canterbury	Local	✓		✓	
26	<i>Canterbury Eastern Bypass</i>	Canterbury	Strategic	✓		✓	
27	Canterbury Western Link Road	Canterbury	Strategic	✓		✓	
28	Herne Bay Marina	Canterbury	Local	✓	✓	✓	✓
29	Whitstable Park & Ride	Canterbury	Local	✓			✓
30	Whitfield:	Dover	Strategic	✓	✓	✓	✓
31	<i>Sewerage and Water Infrastructure</i>	Dover	Local	✓		✓	
32	<i>Bus Rapid Transit Scheme</i>	Dover	Local	✓		✓	
33	White Cliffs Business Park (Phase 3)	Dover	Local		✓	✓	✓
34	Dover Town Centre public realm and place making Improvements	Dover	Local			✓	✓
35	Dover Waterfront	Dover	Local			✓	✓
36	Former Connaught Barracks	Dover	Local		✓	✓	✓
37	Discovery Park, Sandwich	Dover	Strategic		✓	✓	✓
38	A2 Duke of York Roundabout Improvements	Dover	Strategic	✓		✓	
39	A2 Improvements – dualling between Lydden & Dover Town	Dover	Strategic	✓		✓	
40	Dualling of the remainder of the A256 and improved connections to the A258	Dover	Strategic	✓	✓	✓	✓
41	Betteshanger Sustainable Park	Dover	Local		✓	✓	✓
42	Open Golf at Sandwich	Dover	Strategic	✓			✓
43	Folkestone Seafront & Town Centre:	Shepway	Strategic	✓	✓	✓	✓
44	<i>Folkestone Harbour and Seafront</i>	Shepway	Strategic		✓	✓	✓
45	<i>Folkestone Creative Quarter</i>	Shepway	Local		✓	✓	✓
46	<i>Folkestone Townscape Heritage Initiative</i>	Shepway	Local			✓	✓

	Project	Area		1. Unlocking growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
47	<i>Former Gasworks, Ship Street</i>	Shepway	Local	✓			✓
48	<i>Shearway Business Park - Bigginswood/Caesars Way</i>	Shepway	Local	✓	✓		
49	<i>Park Farm Industrial Estate - Former Silver Spring site</i>	Shepway	Local	✓	✓		
50	East Kent College Folkestone Campus Extension	Shepway	Local		✓	✓	
51	Princes Parade, Hythe	Shepway	Local		✓		✓
52	Romney Marsh Regeneration:	Shepway	Strategic	✓	✓	✓	
53	<i>Mountfield Road Industrial Estate/South New Romney</i>	Shepway	Local	✓	✓	✓	
54	<i>London Ashford Airport</i>	Shepway	Strategic	✓	✓	✓	
55	Operation Stack Lorry Area	Shepway	Strategic	✓		✓	
56	Otterpool Park/ M20 Junction 11	Shepway	Strategic	✓	✓		✓
57	<i>Westenhanger Rail Station upgrade</i>	Shepway	Strategic	✓		✓	
58	Port of Ramsgate	Thanet	Strategic	✓	✓	✓	✓
59	Thanet Parkway Station	Thanet	Strategic	✓		✓	✓
60	Inner Circuit Improvement Strategy	Thanet	Strategic	✓		✓	✓
61	<i>Westwood relief strategy</i>	Thanet	Local	✓		✓	✓
62	Margate Junction improvements	Thanet	Local	✓		✓	✓
63	Advanced Manufacturing Park (Manston Business Park)	Thanet	Strategic		✓	✓	
64	Creative Industries Workspace	Thanet	Strategic		✓	✓	✓
65	Feasibility Modelling for Ramsgate, Margate and Viking Bay	Thanet	Local	✓	✓	✓	✓
66	<i>Ramsgate Heritage Action Zone</i>	Thanet	Local				✓
67	<i>Theatre Royal</i>	Thanet	Local				✓
68	<i>Dreamland and Sunshine Cafe Redevelopment</i>	Thanet	Local				✓
69	<i>Viking Bay</i>	Thanet	Local				✓
70	EuroKent Business Park	Thanet	Strategic		✓		
71	Agri-Tech Hub	Thanet	Local			✓	
72	East Kent College Broadstairs Campus refurbishment	Thanet	Local			✓	
73	East Kent Increased rail capacity and journey times	East Kent	Strategic	✓		✓	✓
74	Business funding support – Kent & Medway Business Fund	East Kent	Strategic			✓	
75	Upgrading broadband	East Kent	Strategic	✓		✓	✓

Source: Local authorities / Lichfields analysis

Note: projects in *italics* represent subsidiary projects which are linked to or required in order to deliver the headline project; the numbering of projects does not infer any prioritisation of projects

Amongst the strategically significant projects, there are three key strategic priorities which partners recognise as being crucially important for the future of East Kent and therefore prioritise these above all others:

- (1) Strategic network improvements to A2/M2 required to support the new Lower Thames Crossing, the growth of Canterbury and the Port of Dover;**
- (2) M20/A20 improvements including junction 10A, the proposed lorry holding area, HGV overnight parking and access to Dover; and**
- (3) Improvements to rail capacity, speeds, frequency and associated infrastructure including Ashford SPURS, Westenhanger Station enhancement, and Thanet Parkway.**

The specific projects which will therefore be accorded greater priority as future funding opportunities arise are:

- Brenley Corner improvements in Swale District;
- A2 slip at Bridge (21);
- A2 offslip and park & ride relocation, Canterbury (22);
- Canterbury Eastern bypass (26)
- A2 Improvements – dualling between Lydden & Dover Town (38)
- A2 Duke of York Roundabout Improvements(37)
- Dualling of the remainder of the A256 and improved connections to the A258(39)
- Operation Stack lorry holding area and HGV overnight parking(51)
- Ashford International Station(10)
- M20 Jct 10A (9)
- Westenhanger Rail Station upgrade(53)
- Thanet Parkway Station(55)
- East Kent Increased rail capacity and journey times(68)

The remaining 37 iprojects are defined as ‘locally significant’ and will deliver important benefits for individual locations; many of these will support delivery of the strategically-significant projects and also contribute to the Framework objectives.

These local schemes offer the further potential **to create over 11,000 jobs and potential to unlock over 12,000 dwellings.**

Therefore their collective contribution to East Kent’s growth potential should not be underestimated. A full list of these projects is contained in Appendix 2.

The combined economic potential of the 75 projects identified is summarised below.

Table ES1.2 Estimated Economic Outputs from Projects

Type	Employment *	Dwellings
Strategically-significant	36,300	73,800
Locally-significant	11,100	12,500
Total	47,400	86,300

Source: East Kent local authorities Note: totals rounded * direct and indirect jobs excluding construction

The local authorities recognise that to bring these projects to fruition and to achieve our growth ambitions for East Kent, there is a need to work in partnership. This includes working with the private sector and partners such as the Homes and Communities Agency, Highways England and the South East LEP, to bring forward housing and employment sites, infrastructure and other initiatives, further and higher education providers to deliver skills infrastructure and training, and agencies, including Locate in Kent which

promotes our area and supports inward investment. National Government also has a key role to play, particularly in providing public sector investment to ensure that our infrastructure works effectively, not only for the benefit of East Kent to realise our growth ambitions, but also to support the wider UK economy in view of the crucial role East Kent plays as an international gateway for UK plc.

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1.0 Introduction

The East Kent Growth Framework (EKGF) has been prepared by the East Kent Regeneration Board³ to set out an overarching strategy and clear investment priorities for achieving long-term sustainable economic growth across East Kent between 2017 and 2027. The Framework incorporates the five East Kent districts of Ashford, Canterbury, Dover, Shepway and Thanet.

1.1 The EKGF has been developed on behalf of the Board by Officers with technical support from Lichfields, and comprised three stages:

- 1 Evidence review and data gathering;
- 2 Synthesis and identification of strategic objectives; and
- 3 Identifying investment priorities.

1.2 The process has been informed by consultation and engagement with a range of stakeholders (see Appendix 1), including a series of officer workshops and presentations of emerging findings to members of the East Kent Regeneration Board (EKRB).

Purpose

1.3 East Kent is an important economic sub-region which has been one of the fastest growing areas in the South East in recent years and has significant identified future growth potential. Against this backdrop, there is a strong track record of the East Kent local authorities working together to plan for and execute investment across their boundaries while developing complementary initiatives to deliver growth. There is a strong commitment that this will continue and their activities will serve to stimulate private sector investment demand through increasing confidence in the market.

1.4 More widely, East Kent offers potential to lead the way in building a stronger and more productive economy, as envisaged by the Government's emerging Industrial Strategy⁴, and making a significant contribution to achieving the growth ambitions of the South East Local Enterprise Partnership.

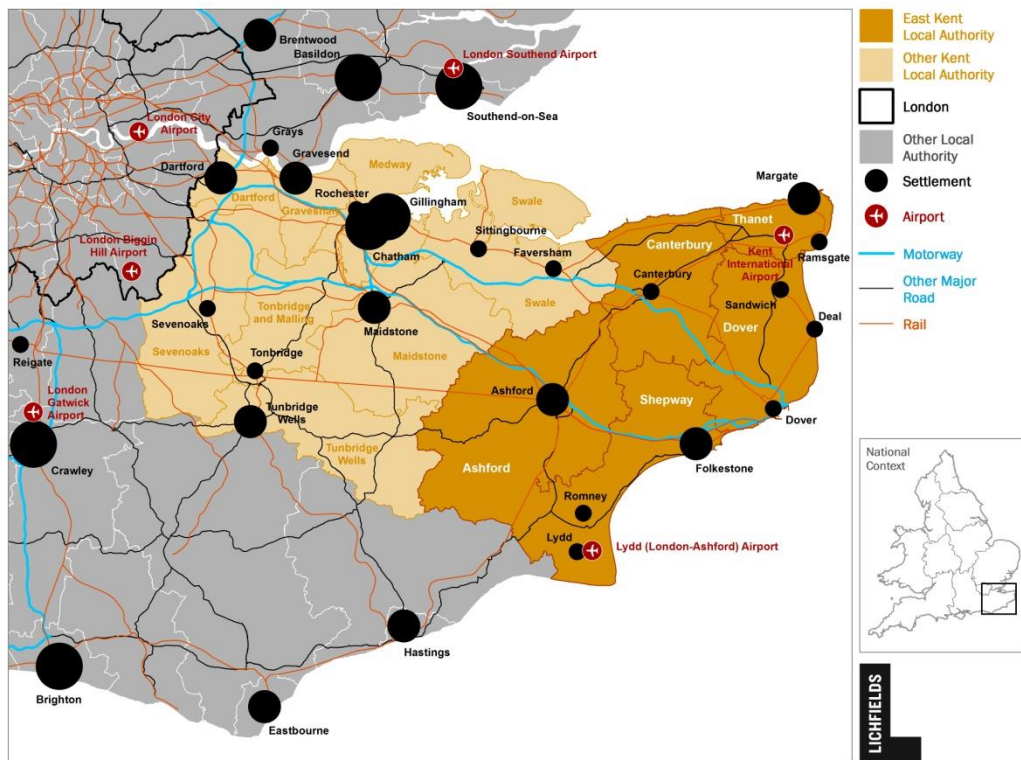
1.5 Two of the local authority areas, Canterbury and Thanet, also sit within the Thames Estuary 2050 Commission.

1.6 East Kent includes the five local authority areas of Ashford, Canterbury, Dover, Shepway and Thanet as shown in Figure 1.1. Throughout this report, 'East Kent' is used to refer collectively to these five local authority districts, which together form the area covered by the East Kent Regeneration Board.

³ The EKRB comprises the five East Kent local authorities and Kent County Council. Board representatives include the Leaders and Chief Executives from each of the five East Kent Districts, together with the Kent County Council's Cabinet Member for Economic Development and Corporate Director of Growth, Transport and Environment.

⁴ *Building our Industrial Strategy Green Paper*, HM Government, January 2017
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/586626/building-our-industrial-strategy-green-paper.pdf

Figure 1.1 Spatial Context of East Kent



Source: Lichfields

- 1.7 It is four years since the previous East Kent Growth Plan was produced and the Board considers now is the time for an updated strategy to help promote East Kent to investors and ensure that East Kent is best placed to plan for and seize opportunities as they arise. This requires understanding and articulating clearly what the East Kent offer is and how investment in East Kent will deliver growth which benefits the investor and the local and wider national economy.
- 1.8 The Framework is therefore intended to set out an overall direction of travel to maximise the economic opportunities and to help address the challenges and issues it faces. The Framework is intended to complement existing strategies and to help inform new ones as they emerge. It identifies a series of objectives, and from these a range of projects that will be the focus of future investment to fully realise the potential of East Kent. These projects will be reviewed and refreshed over time as they progress, and will support the EKRB in promoting a cohesive and consistent approach towards investment opportunities as future funding opportunities arise.

Structure

- 1.9 This document is structured as follows:
- Section 2.0 sets the context by providing a summary **profile of East Kent** and its strengths, opportunities, weaknesses and threats. Section 3.0 outlines the **strategy for growth** and identifies **four strategic objectives**.
 - Section 4.0 identifies **future investment priorities** which will be the focus for future investment. This includes a review of progress against spatial priorities set out within the 2013 Plan for Growth and new projects that have emerged since.

- 1.10 The Framework is informed by a separate **Evidence Review report** which contains detailed evidence on the performance of the East Kent economy and trends over time. This draws upon many existing data sources and other published evidence available for East Kent.

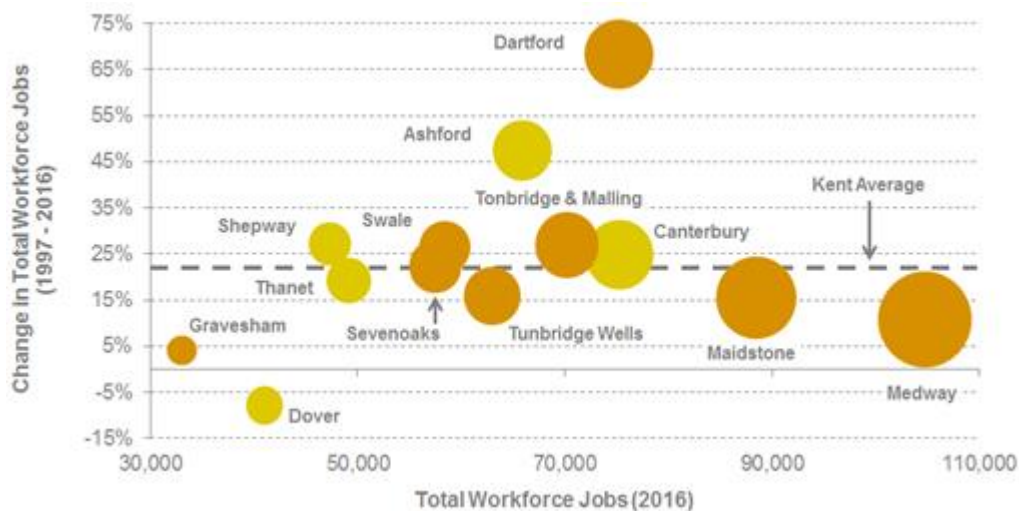
2.0 Setting the Context

This section provides an overview of the East Kent economy, highlighting key opportunities and challenges. It draws on the data and analysis contained in the Evidence Review report, set against the inter-connected themes of economy, people and place.

Economy

- 2.1 East Kent is a significant economic sub-region accommodating about 279,000 jobs, equivalent to about a third of the Kent total. The economy has expanded rapidly since the late 1990s, growing by over 20%, similar to the rest of Kent. In particular, Canterbury is now the third largest workplace economy in Kent, and Ashford was the fastest growing district in Kent second only to Dartford⁵ (Figure 2.1).

Figure 2.1 Employment Change by Kent Local Authority



Source: Experian (September 2016) / Lichfields analysis

- 2.2 East Kent supports a diverse business base across a wide range of activities and has performed strongly in terms of growth of higher-value sectors, such as professional services, finance and information communications and technology. There is real diversity of sector strengths which gives East Kent both a range of complementary activities and added resilience when it is considered as a single economic sub-region.⁶
- 2.3 There are established and growing clusters of specialist and high value economic activity, including higher education (Canterbury), pharmaceuticals (Dover), creative, media and nuclear energy (Shepway), creative and agri-tech (Thanet) and advanced manufacturing (Ashford and Thanet).
- 2.4 Reflecting the rural and coastal offer of East Kent, the visitor economy is vital and directly and indirectly employed around 32,500 people in 2015. For example, between 2013 and 2015 the

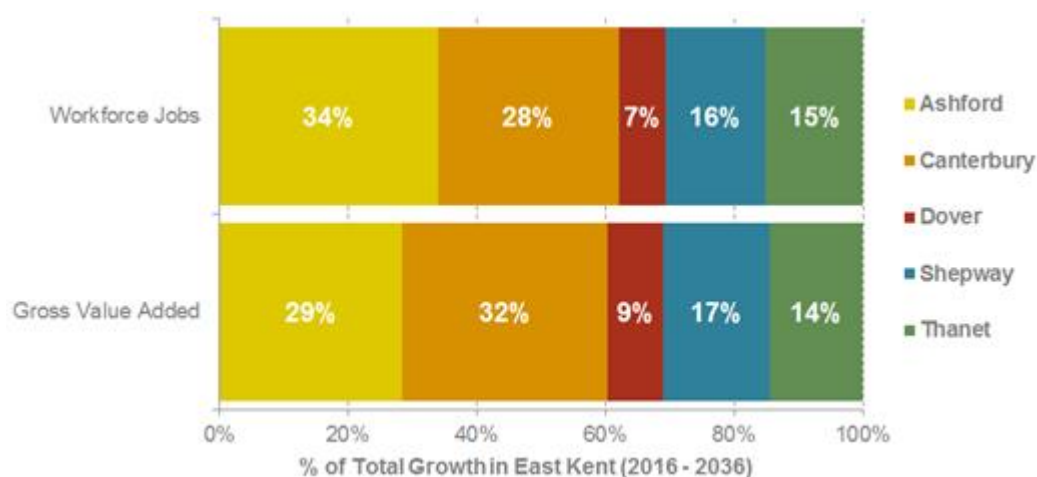
⁵ Experian September 2016

⁶ The business case for the East Kent coastal authority specifically recognises the benefits that the economic geography of the area would present to a new council. https://www.shepway.gov.uk/media/4107/A-business-case-for-the-potential-creation-of-a-single-new-council-from-the-four-East-Kent-coastal-districts/pdf/A_business_case_for_the_potential_creation_of_a_single_new_council_from_the_four_East_Kent_'coastal'.pdf

fastest increase in the total value of tourism (+19.4%) and increase in tourism related jobs (+23.3%) in the UK was in Thanet.

- 2.5 In total, over 70,000 jobs in East Kent – a quarter of the total economy – are now within growth sectors which are identified by the South East Local Enterprise Partnership as having high growth potential and where support for innovation should be targeted.⁷
- 2.6 East Kent has historically been characterised by low productivity levels, but the growth of higher value sectors means the area’s performance has improved consistently over the past two decades. However, consistent with the situation across the country, the rate of improvement has slowed since the recession when investment stalled, so there is now real potential to focus future investment to help bridge the productivity gap with other parts of the South East. The latest economic forecasts⁸ indicate growth potential of some 36,500 jobs and 50% growth in economic output by 2036 (split down by local authority area in Figure 2.2) which represents a substantial economic dividend not only for East Kent but the wider economy.

Figure 2.2 East Kent Employment and GVA Forecasts



Source: Experian (September 2016) / Lichfields analysis

- 2.7 Therefore the priority moving ahead is to continue to promote and build on East Kent’s unique selling points and encourage greater representation in ‘wealth generating’ knowledge-based sectors. This might mean building capacity around specific sector opportunities where East Kent can offer a competitive advantage, such as agri-tech in Thanet which maximises the strength of Thanet’s sunlight in its production along with the emerging land management, food security and environmental offer at Betteshanger in Dover district. This support will help drive innovation across the breadth and depth of the East Kent economy and in time will ensure all parts of East Kent can establish new sector strengths either directly or through supporting supply chains. This requires investment in supporting infrastructure and ensuring appropriate training and skills development, so that all communities across East Kent are able to benefit from the opportunities that economic growth creates.

People

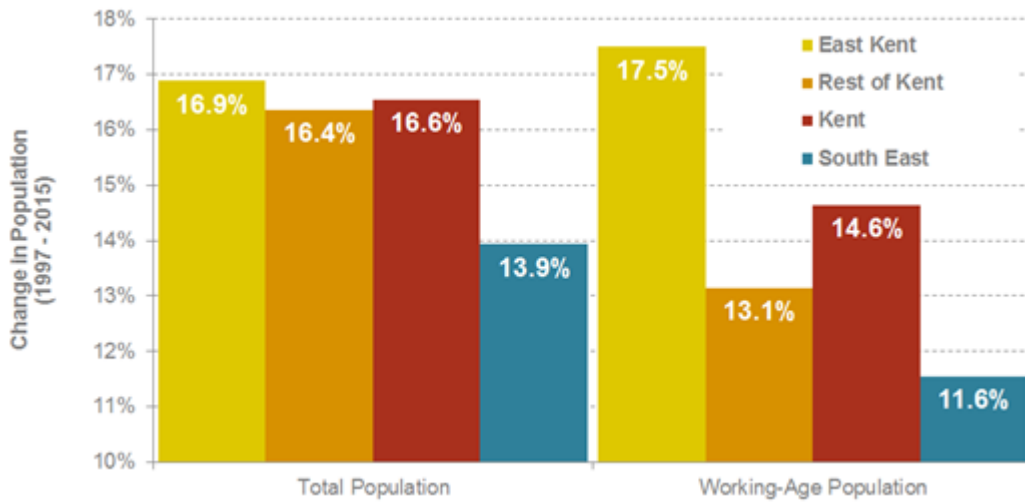
- 2.8 The population of East Kent has grown significantly over recent years, outpacing growth in the rest of Kent and the wider South East. In particular, the working-age population of East Kent has grown by 18% since 1997, compared to 13% in the rest of Kent and 12% in the wider South

⁷ These are defined by the South East LEP as manufacturing, creative industries, energy (including renewables), food and drink, higher education, life sciences, tourism and transport and storage.

⁸ Experian Regional Planning Service, September 2016

East (Figure 2.3). Currently Ashford, Canterbury and Thanet, and to a lesser extent Dover and Shepway, are projected to drive population growth and this will be vital for economic vitality moving forward.

Figure 2.3 Total and Working Age Population Growth, 1997-2015

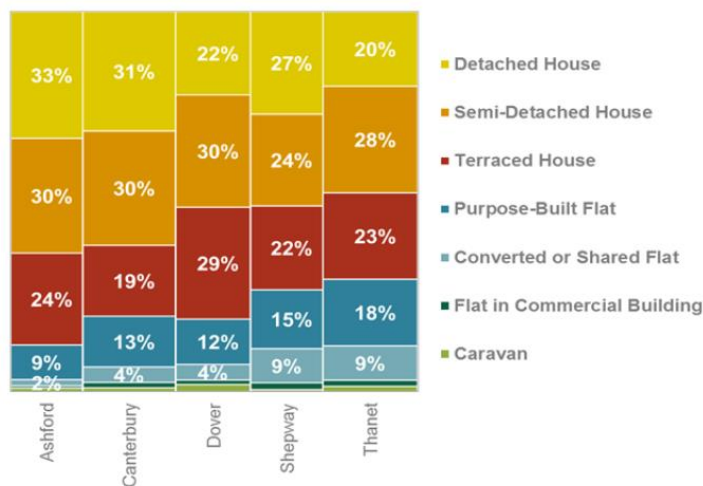


Source: ONS (Mid-Year Population Estimates) / Lichfields analysis

2.9

Part of this recent population change has been driven by migration flows, with East Kent functioning as a net importer in migration terms from other parts of the South East, notably London and other parts of Kent. The profile and nature of existing housing stock varies across East Kent and this plays a key role in influencing choices of those who might move to East Kent (Figure 2.4). As a centre of education, Canterbury, in particular, plays a major role in attracting young people to the area, many of whom stay after graduation, whilst recent housing delivery in Ashford has also attracted new people to East Kent. Thanet, Dover and Shepway are currently more self-contained in migration terms (i.e. people tend to move locally). Once within East Kent, many residents move elsewhere within the sub-region, in particular to the coastal areas where the stock of housing tends to be more affordable.

Figure 2.4 Housing Stock by Dwelling Type

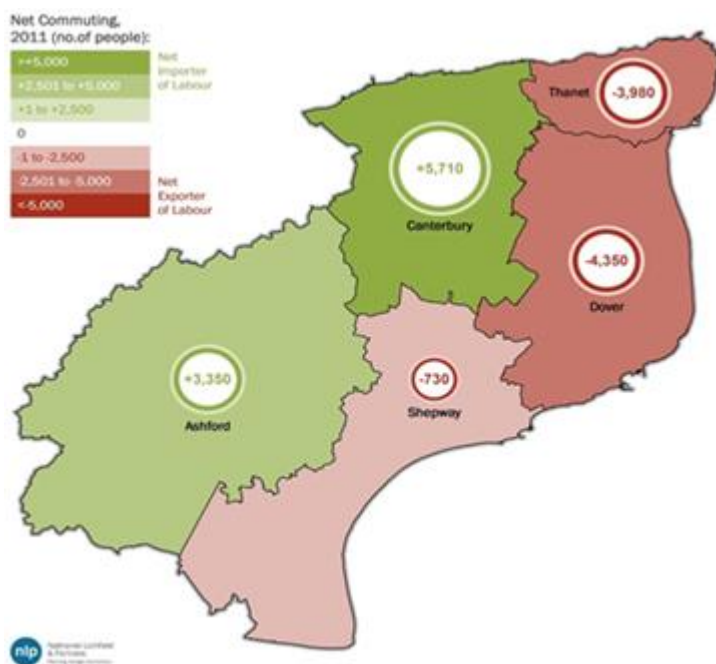


Source: ONS (2011 Census) / Lichfields analysis

2.10 East Kent has a diverse socio-economic profile which includes some areas of retired populations around the coastal stretches and also growing clusters of young professionals and families in the sub-region’s key towns (such as Ashford, Dover, Folkestone and Margate). Some 60% of East Kent’s population is of working-age, in line with the rest of Kent and South East, which is a factor in supporting the future growth of the local economy and its entrepreneurial base. Planned development and regeneration will importantly serve to broaden this demographic diversity in the future. Looking ahead, the opportunity for East Kent could be to spread this diversification further and encourage greater working-age population growth across all parts of East Kent, whilst also retaining the valued character of the sub-region as a sought-after rural and coastal location.

2.11 In labour market terms, East Kent is characterised by its strong economic relationships with other parts of Kent and London and overall the sub-region is a net exporter of labour. Beyond HS1 links to employment opportunities in London, Ashford and Canterbury (as East Kent’s largest economies) act as the main internal employment centres drawing in significant flows of workers from Dover, Shepway and Thanet (Figure 2.5).

Figure 2.5 Net Commuting Balance by East Kent Local Authority



Source: ONS (2011 Census) / Lichfields analysis

2.12 Over the last 10 years, East Kent has made real progress in terms of improving qualification levels, with reductions in the proportion of people with no qualifications across all authorities. There have also been considerable increases within higher qualification groups, partly linked to the strength of the higher and further education offer in East Kent. In particular, East Kent has a higher education presence of national scale and significance, with the University of Kent, Canterbury Christchurch University and the University for the Creative Arts accounting for over 32,000 students. The area’s Further Education assets include Ashford College (run by Hadlow College who also has a base at Betteshanger) and the merging Canterbury College with East Kent College which has campuses at Dover, Folkestone and Broadstairs; the latter recently received five ‘Outstanding’ gradings in an Ofsted inspection.

2.13 There is a need for strong connectivity and accessibility between East Kent’s key housing growth and employment centres in order to facilitate the flexible movement of labour, to help match

local residents with suitable employment opportunities and to generate business growth. This may also serve to alleviate housing market pressures and improve the choice and affordability of housing for different socio-economic groups.

Place

- 2.14 One of the great strengths of East Kent, and what attracts people to the area, is the diversity of place and quality of life which combine to make the area a desirable place to live and work and also supports a vibrant visitor economy. There is a rich historic and cultural offer, including the historic centre of Canterbury, and a varied landscape which ranges from the Kent Downs Area of Outstanding Beauty down to the area's unique and internationally renowned stretch of coastline. Coupled with this, East Kent is positioned as a gateway between Europe, London and the rest of the UK and has a unique blend of infrastructure and economic assets which provide a strong platform for growth.
- 2.15 High Speed 1 (HS1) has been the most high-profile investment of recent years resulting in considerably reduced journey times, a good choice of services to Central London and continental Europe and also improved rail connectivity within Kent (Figure 2.5). This has given direct international connectivity via Ashford International through the Channel Tunnel and also extended the reach of the wider London housing market to East Kent where shorter commuting times and availability and/or relative affordability of housing have combined to attract new residents into East Kent. For example, in 2016 Thanet saw a 31% increase in off peak travel to the district. There are further opportunities for passenger growth, particularly if HS1 services can be increased as is currently being proposed.
- 2.16 East Kent has incredible links to Europe for leisure and industry. Improved international services from Ashford International will expand its role as the commercial gateway to the UK by rail. Other key assets include the Port of Dover, which is Europe's busiest passenger port and currently handles 17% of total UK trade in goods at a value of £119 billion, and the Port of Ramsgate, which currently has capacity of 500,000 units per annum from cross channel RoRo traffic and could offer a complementary service to The Port of Dover and boost Kent's resilience to Operation Stack when operational. The planned expansion of London Ashford Airport with its new extended runway will also provide increase international links from East Kent in the future.
- 2.17 East Kent has the infrastructure to support business and skills growth and investment is necessary to ensure that business has access to the talent needed to grow. The Discovery Park Enterprise Zone is the most successful enterprise zone in the UK. There is access to world-class higher education facilities, particularly focused at Canterbury where the University of Kent, Canterbury Christ Church University and the University for the Creative Arts have campuses. Excellent further education is provided by East Kent College at Canterbury (through their proposed merger with Canterbury College), Folkestone and Dover and by Hadlow College at Ashford and Betteshanger. These are all contributing to upskilling the workforce of East Kent and ensuring that the resident population has the qualifications and skills necessary to drive future economic growth and enhance East Kent's competitive advantage.
- 2.18 Recent housing growth has supported population growth notably in Ashford and Canterbury. Furthermore, significant additional capacity has been identified on a range of sites across East Kent, including on council owned land (e.g. the Otterpool Park Garden Town in Shepway⁹) which will help sustain the future working-age population and act as a catalyst for the regeneration of key towns (with a particular focus on town centres) as attractive places to live and work.

⁹ https://www.shepway.gov.uk/media/3726/Otterpool-Park-Expression-of-Interest/pdf/Shepway_District_Council_EoI.pdf

- 2.19 There has been growing demand from high-value industries such as the life sciences, creative and technology industries, as well as those in the finance and business services sector. High quality affordable office stock and accessibility to London and European markets are key locational drivers for business that differentiates East Kent from other places. This will continue to drive delivery of new commercial space, including for start-up and existing businesses. A number of strategic sites have been identified to attract investment to help modernise and grow East Kent’s current mix of industrial and office premises, which in some cases is coming under pressure from redevelopment or conversion to other uses.
- 2.20 Whilst East Kent is well served in terms of infrastructure, there remain pinch-points and areas of congestion that impact the efficiency of the network. One of the most wide-reaching is Operation Stack on the M20 which requires a long-term solution. There are a number of solutions, including a lorry parking area along this route or utilising the Port of Ramsgate more, with its dedicated route to avoid town centre traffic congestion, to build resilience into our cross Channel offering. Failure to bring forward early solutions to Operation Stack will imperil UK plc.
- 2.21 Future arrangements regarding customs controls following Brexit are still to be determined, but are highly relevant to the operation of routes through Kent and particularly around Dover, Ramsgate and the Channel Tunnel. The national significance of East Kent’s infrastructure and the significance of flows of people and goods that are supported by it, means that addressing identified pinch points within the sub-region will not only benefit East Kent but the competitiveness of the UK as a whole.
- 2.22 A number of locally significant infrastructure capacity issues have also been identified by the Growth and Infrastructure Framework¹⁰ for Kent and Medway (currently being updated). The strengthening of existing key routes will be vital if the scale of planned new housing and commercial development in East Kent is to be achieved. There are also some nationally significant infrastructure points just outside of the immediate East Kent area, such as a new Lower Thames Crossing and the M2/A2 junction at Brenley Corner, the dualling of the A2 from Lydden to Dover and the A2/A256/A258 Junction at Duke of York’s, where future investment is critical to support continued growth in the sub-region.

Synthesis

- 2.23 The analysis in the Evidence Review has been synthesised to arrive at an overall SWOT analysis for East Kent which is set out in Table 2.1. This is not exhaustive, but seeks to capture the key collective issues as far as they relate to East Kent in overall terms as has been described above.

Table 2.1 East Kent SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong working-age population and employment growth in recent years • Rising skill levels and improved productivity across all local authorities • Relatively high levels of labour self-containment in Dover, Shepway and Thanet • Success in attracting in-migrants, particularly to Ashford and Canterbury • Quality of life advantages and cultural offer 	<ul style="list-style-type: none"> • Uneven spatial distribution of growth • High value sectors currently clustered in a small number of locations • Widening productivity gap between East Kent and wider region since the recession reflecting drop in recent investment • Uneven qualification attainment levels and below regional average in all areas except Canterbury

¹⁰ <http://www.kent.gov.uk/about-the-council/strategies-and-policies/environment-waste-and-planning-policies/growth-and-infrastructure-framework-gif>

<ul style="list-style-type: none"> • Stunning coastal location and beautiful countryside Competitive travel times to London and relative ease of commuting to the Capital • Major higher education and further education offer • Comparative affordability of housing and commercial space • Strong demand for commercial space • Presence of strategic infrastructure giving excellent access to London, continental Europe and the wider South East region 	<ul style="list-style-type: none"> • Housing affordability issues particularly in Canterbury and Ashford • Pockets of socio-economic deprivation, particularly in some coastal communities • Congestion issues on some parts of the strategic infrastructure network, including Operation Stack.
<p>Opportunities</p>	<p>Threats</p>
<ul style="list-style-type: none"> • Representation across multiple growth sectors, and access to range of economic assets • Space to grow with significant unrealised development schemes and projects (to enable both housing and employment development) • Councils taking a proactive approach to making land available for development and also developing some sites out themselves • Proactive interventions by councils will increase private sector investment confidence, as well as reducing the perceived or actual risk of bringing forward some key development sites • Capacity to grow usage of High Speed 1 and to increase service provision • Forecast population, employment and economic output growth • Increasing demographic and socio-economic diversity, including more young people, families and share of working-age population • Potential to retain a greater share of high-skilled out-commuters and graduates from HE institutions to generate more business start-ups • Regenerating East Kent’s town centres to boost resident and business attractiveness • Strong partnership working between East Kent authorities and business provides opportunities for greater capacity and capability to coordinate investment and economic development policy and initiatives • Expansion of direct services from Ashford International Station to Holland and Germany • Brexit negotiations may result in employment opportunities associated with freight clearance and supply chain growth in East Kent. • Securing the Open Golf Championship at Sandwich on a regular basis will provide substantial economic benefits and international recognition for East Kent 	<ul style="list-style-type: none"> • Higher recent economic growth in Ashford and Canterbury (compared to other areas in East Kent) and lack of ‘spill over’ to other East Kent locations • Cross country infrastructure constraints impacting ability to deliver strategic housing and employment growth • Lack of infrastructure investment could limit economic growth potential of East Kent and wider UK economy • Under-performance of town centres and need to support long-term regeneration • Loss of employment space, lower land values and viability issues constraining new commercial development. • Lack of comprehensive improvements to the M2/A2 route from the proposed Lower Thames Crossing to the Port of Dover • Lack of long-term solution to address lorry parking issues associated with Operation Stack • Future customs arrangements following Brexit currently unknown but may adversely impact functioning of Port of Dover and Channel Tunnel • Impact of Brexit on the flow of people and trade across the Channel • Peak time overcrowding on some High Speed rail services • Impact of legal challenges in causing delays in developments coming forward

<ul style="list-style-type: none">• The development of Full Fibre Broadband Networks through the incorporation of new planning policies for new developments.	
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Source: Lichfields analysis

3.0 Strategy for Growth

This section defines the strategic objectives that underpin the future strategy for growth in East Kent.

- 3.1 Drawing on the context set out in the previous sections, four overarching strategic objectives have been identified and validated through consultation with a series of economic stakeholders across East Kent. These are cross-cutting to provide the ‘building blocks’ to guide the future strategy for supporting growth across East Kent. They have been selected on the basis that investment within these four areas is considered to offer the greatest scope and potential to deliver economic growth over the next few years within the sub-region, whether this relates to job creation, development of new housing and commercial space or by enhancing productivity within East Kent’s workforce and business base.
- 3.2 Given the national significance of some of East Kent’s economic assets, the strategic objectives set out within the framework provide a way of channelling future investment to not only deliver economic growth across East Kent, but for the UK more broadly. They also reflect an aspiration amongst East Kent partners for a balance of ‘quality’ and ‘quantity’ outcomes associated with economic growth and development. They are not intended to operate in isolation but are complementary and self-reinforcing.
- 3.3 These objectives are summarised in Figure 4.1 and detailed further below.

Figure 3.1 Framework Objectives

Framework objective	Purpose
1.Unlocking Growth through Infrastructure	Funding key pieces of infrastructure to unlock sites and development opportunities as well as alleviating pressure and addressing constraints within East Kent’s existing infrastructure networks. This covers a range of infrastructure provision including highways, rail, air, ports, broadband and utilities
2.Delivery of Business Space	Delivery of high quality enterprise, innovation and incubator space to support existing businesses to grow and to enable East Kent to compete for inward investment and attract high value, knowledge based activity and jobs
3.Supporting Skills and Productivity within Business	Upskilling existing residents and attracting high skilled workers to drive innovation and productivity within East Kent’s business base, and helping businesses to access the support and finance they need to grow
4.Place Making and Shaping	Creating attractive places to live and work through revitalising the existing built environment and creating new spaces. Within East Kent, town centres provide a key focus for place making activity, with significant scope to enhance the quality of urban spaces and public realm

Source: Lichfields

- 3.4 These objectives echo themes set out within the Government’s emerging Industrial Strategy at a national level, which identifies ten ‘pillars’ to driving future growth and investment. These include:
 - **Investing in science, research and innovation** – “we must become a more innovative economy and do more to commercialise our world leading science base to drive growth across the UK.”

- **Developing skills** – “we must help people and businesses to thrive by: ensuring that business has access to the talent it needs to grow; ensuring everyone has the basic skills needed in a modern economy; building a new system of technical education to benefit the half of young people who do not go to university; boosting STEM skills, digital skills and numeracy; and by raising skill levels in lagging areas.”
- **Upgrading infrastructure** – “we must upgrade our standards of performance on digital, energy, transport, water and flood defence infrastructure, and better align central government infrastructure investment with local growth priorities.”
- **Supporting businesses to start and grow** – “we must ensure that businesses across the UK can access the finance and management skills they need to grow; and we must create the right conditions for companies to invest for the long term.”
- **Cultivating world-leading sectors** – “we must build on our areas of competitive advantage, and help new sectors to flourish, in many cases challenging existing institutions and incumbents;” and
- **Driving growth across the whole country** – “we will create a framework to build on the particular strengths of different places and address factors that hold places back – whether it is investing in key infrastructure projects to encourage growth, increasing skill levels, or backing local innovation strengths.”

3.5 The Government notes that these pillars all reinforce one another; an economy with more innovative start-ups will require more highly skilled people, more venture capital, and better digital infrastructure. Inward investment can drive productivity growth by bringing new ideas and new ways of doing things to the UK. But to attract inward investment we need to be competitive on energy costs and infrastructure – as well as having a strong science base and highly skilled people.

3.6 This Growth Framework reflects these themes but contextualises them in terms of unlocking the economic potential of East Kent. However, by aligning with national policy objectives, the East Kent Regeneration Board can ensure that East Kent is in the strongest position to put its case forward to Government departments, the South East Local Enterprise Partnership and other stakeholders (e.g. infrastructure providers) and agencies relevant to future delivery of projects. For many of the Government’s pillars, such as research and innovation and infrastructure, East Kent already has great strengths. The Growth Framework will enable the sub-region to capitalise fully on them.

1. Unlocking Growth through Infrastructure

3.7 This objective is considered to be the most important of the four framework objectives and focuses on securing delivery of critical infrastructure projects, working with industry bodies and other agencies where necessary. Significant progress has been made to improve infrastructure in East Kent in recent years, but further investment is required, particularly given the importance of East Kent as the UK’s gateway to Europe.

3.8 There are a significant number of development sites with potential to deliver major housing and employment growth in East Kent but these need to be unlocked with supporting infrastructure. The delivery of new homes and jobs is key to maximising the future economic potential of East Kent and the larger schemes will require up-front infrastructure to be put in place in a coordinated and phased way. A good example of this is the delivery of the new junction 10A on the M20 to facilitate housing and employment growth in south Ashford, which is due to be completed in 2019. Whilst the list of schemes may change over time, the principle of ensuring a deliverable supply of development land aligned to statutory development plans is a key objective of this Framework.

- 3.9 The future economic architecture and productivity of East Kent depends on access to efficient transport and digital infrastructure, to support the functioning of the labour market and to give businesses the connectivity that they demand. As noted in section 2.0, there are both strategic opportunities for road investment (e.g. on the motorway and trunk road network) and also local, small-scale requirements (e.g. to alleviate bottlenecks on local routes).
- 3.10 Given the extent of international connectivity, upgrading infrastructure within and around East Kent will also bring national benefits, with the effect that the potential return on investing in East Kent's infrastructure will be higher than elsewhere in the UK due to the sub-region's strategic location between mainland Europe, London and the rest of the country. The case for investing in strategic infrastructure is further strengthened by the UK's upcoming exit from the European Union and the potential impacts that post-Brexit border controls¹¹ could have upon a number of locations in East Kent. However, Brexit may also offer opportunities for East Kent, such as growth in sectors associated with freight clearance and supply chain growth.
- 3.11 Maximising the opportunities for economic growth in East Kent requires thinking beyond the East Kent boundaries for transport infrastructure. For example, the Lower Thames Crossing is critical to facilitating future growth and improving productivity and resilience for businesses in the wider economy and will also impact on East Kent. At a national level, the Lower Thames Crossing provides a critical piece of infrastructure for enabling the effective transportation of goods from the UK to Europe and it is important that investment in Kent's strategic road infrastructure keeps pace to ensure that this route to market can sustain increasing volumes of traffic without adversely affecting the day-to-day operations of East Kent's business community. Therefore there is a need to adopt an integrated strategy to ensure maximum benefits are achieved, with upgrading of the M2/A2/A299, improving Brenley Corner junction in Swale and improvements to the A2/A256/A258 Duke of York's junction in Dover necessary as part of a coordinated package of measures to improve strategic connectivity. This would also benefit East Kent through supporting sites for housing and employment growth.¹²
- 3.12 There is also widespread recognition of the need to improve rail services in East Kent including, as noted above, making more intensive use of HS1 through the provision of additional services across East Kent, continual improvements to journey times and new station stops at Thanet Parkway (not only supporting business growth in Thanet, but also at Discovery Park Enterprise Zone) and Westenhangar; the latter is critical to supporting the Otterpool Park Garden Town which represents the largest future development project in East Kent. However, it is also important that Dover and Coastal East Kent are provided with HS1 Services on a level playing field with other locations and any new station stops do not prejudice the levels of service provided to Dover, Deal and Sandwich. Whilst East Kent's existing strategic infrastructure (such as HS1, M2, M20) is considered to be one of its key strengths, intra-Kent links are considered by stakeholders to represent a significant weakness to facilitating future growth, particularly east-west links and routes away from East Kent's main economic hubs.
- 3.13 Excellent quality digital infrastructure is central to enabling business productivity, innovation and international trade and provides East Kent with a unique selling point. Kent County Council is currently working with the Government's broadband agency, Broadband Delivery UK, on a second project to further extend the reach of superfast broadband which is aiming for 95% coverage by the end of 2017 and 95.7% coverage during 2018. However some rural communities in East Kent will still be under-served and therefore local projects will need to be progressed.

¹¹ See Ready on Day One: Meeting the Brexit Borders Challenge, Charlie Elphicke, May 2017 for more details

¹² This approach has also been advocated by the South East LEP in their response to the Lower Thames Crossing consultation, http://www.southeastlep.com/images/uploads/resources/SELEP_response_to_Lower_Thames_Crossing_Consultation_March_2016.pdf

2. Delivery of Business Space

- 3.14 Delivery of new business space is key to supporting the growth of existing businesses in East Kent and contributing to improved efficiency and productivity, as well as providing an attractor for mobile footloose investment into the area. There have been some real success stories in recent years, such as Eureka Park in Ashford and Discovery Park in Sandwich which has reinvented itself since the downsizing of Pfizer and benefitted from Enterprise Zone status. The East Kent Spatial Development Company works as an East Kent¹³ local authority owned investment vehicle and has successfully brought forward new high quality business accommodation, for example at Canterbury Innovation Centre, Aylesham Business Park in Dover District and Clover House in Whitstable .
- 3.15 Kent is an increasingly favourable business location, with the impact of rising prices in London and other parts of the South East making the East Kent business ‘offer’ increasingly competitive (as well as its residential offer). However, it must be recognised that many potential employment developments face viability challenges that can delay delivery. This means that East Kent’s stock of industrial and commercial space is at risk of becoming dated and not growing to keep pace with future job growth needs. In addition, some sites are under pressure for redevelopment to other uses, and office floorspace has been lost across some of East Kent through Permitted Development Rights that allow conversion to residential units.
- 3.16 The East Kent local authorities are actively intervening both directly themselves and through the local authority-owned investment vehicle, the East Kent Spatial Development Company (EKSDC), to bring forward key development sites across East Kent for both housing and employment. This is serving to stimulate the private sector investment market by reducing the risk associated with the development of some sites, which require considerable remediation in some cases, and, in other instances, by providing the market evidence of the returns that can be achieved to the private investor.
- 3.17 This Framework Objective is therefore to support delivery of the next generation of high-quality business space in East Kent. This involves the full ‘ladder’ of premises, including incubator and innovation space, that can accommodate small and fast-growing businesses alongside larger office and industrial premises that can allow existing businesses in East Kent to be retained and to scale-up. This will ensure that East Kent can offer the choice, flexibility and affordability of premises to meet a range of business and sector needs (helping to enhance the appeal of East Kent’s centres for business, linked to objective 1 above) and also to be in a stronger position to positively respond to mobile inward investment opportunities when these arise. This includes leading innovation in sectors such as advanced manufacturing where East Kent can develop new strengths (linked to objective 4 below), as well as accommodating industrial activities which are increasingly being displaced out of Greater London.
- 3.18 There are a number of examples of high quality business space being delivered in East Kent in recent years and the East Kent Spatial Development Company has the potential to continue to provide an important vehicle to support future delivery of quality business accommodation over the time horizon of this Growth Framework.

3. Supporting Skills and Productivity within Business

- 3.19 Productivity levels and economic output vary considerably across East Kent, and the gap between the area and the rest of Kent and wider South East has recently started to widen again in the period since the recession, having narrowed previously. This means working with existing businesses and sectors in East Kent to help build efficiency and progression up the value chain,

¹³ Thanet DC, Canterbury CC, Shepway DC and Dover DC

but also to grow the higher value sectors that have potential as noted in section 2.0. The Framework therefore advocates an approach which supports the development of complementary sector specialisms across different parts of East Kent including:

- **Ashford:** Advanced manufacturing, life sciences, ICT
- **Canterbury:** Higher education, tourism, creative, healthcare and professional services
- **Dover:** Life sciences, transport .logistics and storage, tourism and heritage
- **Shepway:** Tourism, energy, creative and digital media
- **Thanet:** Advanced manufacturing, agri-tech, tourism, creative and heritage

3.20 A strategy to support higher growth and higher value added sectors needs to be supported by improvements in the skills profile of East Kent if local people are to access jobs within new and emerging sectors and the benefits of these are to accrue locally. This will need to include efforts to tackle low skills attainment amongst some younger residents on leaving school, as well as basic employability and business skills, which stakeholders note continue to represent a key gap. There is also a need to retain a greater share of East Kent’s university graduates and embedding these higher level skills within the sub-region’s business base. Similarly, there is a need to ensure that opportunities for businesses to start-up and grow are fostered, such as access to core business management skills and financing.

3.21 In this respect, there are opportunities to further enhance the links between the strong education sector with the sector specialisms in the districts (for example, advanced manufacturing in Thanet and creative industries in Shepway and Thanet). Ways to achieve this will be explored further, including enhancing partnership working between the local authorities and education and training providers to identify the specific skills needs of employers in key sector potentially through regular ‘sector conversation’ workshops

3.22 Recent higher education capital investment, such as the Engineering, Design, Growth and Enterprise (‘EDGE’) Hub at Canterbury Christ Church University which was recently awarded funding through the Local Growth Fund, is a good example of a cross-sector facility linking education and business that will benefit all parts of East Kent as well as other areas.¹⁴

3.23 Other skills related investments and projects include major Skills Funding Agency investment in East Kent College’s Folkestone and Dover Campuses and the development of a brand new Elwick Road campus for Ashford College which is due to open in September 2017.

3.24 Both Canterbury Christ Church University and the University of Kent have major plans to expand their offer; for example, the University of Kent’s masterplan for a redeveloped and expanded campus includes a new business school, supercentre for Biotechnology and Molecular Medicine and new media and innovation space/biotechnology development. Some of these projects are included within the EKGF’s ‘future investment priorities’ (see Chapter 5.0) and have the potential to stimulate a significant pipeline of capital investment in East Kent over the coming years.

4. Place Making and Shaping

3.25 This objective is about supporting the essential ingredients that can bring about successful places – those which are attractive places to live , work and invest – and in doing so provide the platform for sustaining future economic growth. East Kent already offers significant lifestyle attractions, such as vibrant historic towns (with many listed buildings and conservation areas), outstanding countryside and coastal areas, all of which represent important economic assets. A number of East Kent’s larger town centres offer significant scope to facilitate growth and

¹⁴ <https://www.canterbury.ac.uk/news-centre/press-releases/2017/engineering-hub-wins-6m-government-funding.aspx>

regeneration. There is an opportunity for planning and feasibility modelling of town centres and coastal areas to make inroads into creating a coherent sense of Place. This type of investment will significantly improve the quality of life for those who rely on these town centres for access to a choice of goods and services, as well as act as a catalyst to attract new residents who bring additional expenditure and the talented people able to generate new business activity and start-ups. In turn this process can help secure the investment needed to secure wider regeneration, as has already been happening particularly in Ashford, Folkestone and Margate.

3.26 A number of key stakeholders consulted in the development of this EKGf noted that whilst many parts of East Kent are well served and supported by the strategic and local infrastructure needed to facilitate growth and investment, the quality of built environment and supporting infrastructure – in particular some of the sub-region’s town centre and housing offers – can often let it down. Investing in ‘place making’ activities is therefore considered to be crucial in enabling East Kent’s settlements to become more attractive and appealing to business and people. In so doing this will maximise the growth potential afforded by recent investments such as HS1.

3.27 The focus of this objective is therefore to continue to promote projects and interventions that contribute to revitalising the existing built environment and create new urban spaces that will forge a stronger network of town centres across East Kent, whilst also enhancing the natural environment which is a hallmark of the area. This will not only enhance the individual identities and distinctiveness of these towns but also reinforce a network of complementary location ‘brands’ that will increase the profile of East Kent to investors, visitors and residents alike. The need to showcase a clearer economic profile and role for East Kent and its key settlements was identified through stakeholder consultation; this is relevant for all strategic objectives, including improving workforce productivity by better matching the skills of local people to the economic and employment opportunities of the future (see objective 4).

3.28 Practically, it will also support the functioning of the housing market through new housing development to attract new residents and may also support new business space to help the future economic vitality of East Kent overall.

Towards an Integrated Strategy

3.29 The Framework objectives are designed as the ‘building blocks’ that collectively are designed to establish the strongest platform for future economic growth in East Kent. In turn, these objectives provide the basis for setting future investment priorities (see section 4.0). Set out below are elements of how this approach might be characterised:

- a **A strengthened East Kent brand** that more clearly articulates the strength and diversity of the East Kent offer (and potential) to the marketplace and those with a stake in delivery, but also to advocate East Kent’s growth potential to a wider audience.
- b Maximising **economic potential and meeting regeneration needs**, so that there is a focus on both giving East Kent’s existing successful economic ‘hotspots’ the capacity and resources to grow, but also recognising where gaps might exist and scope for economic change is perhaps greatest.
- c **Balancing short and long term opportunities**, particularly against the backdrop of potentially uncertain economic times. In a competitive market for funding and investment, it naturally follows that short term returns can be prioritised, but the Board recognises that taking a long-term view is also important.
- d **Consistency of plans and strategies** – this Framework is intended to set an overall direction of travel and to guide how future investments might be prioritised. It does not, however, operate in isolation and relies upon other plans and programmes that

directly impact delivery. A coordinated approach is therefore strongly encouraged, including the future refresh of the South East LEP Strategic Economic Plan.

4.0 Future Investment Priorities

This section identifies the investment priorities and projects required to deliver the strategic objectives defined by this Framework.

4.1 A comprehensive review of potential investment projects across East Kent has been undertaken having regard to the existing evidence available and working in close partnership with each of the East Kent local authorities. This includes projects previously identified in the 2013 East Kent Growth Plan which are either underway and may require further support to be fully delivered or have not yet come forward.

4.2 The projects have been identified on the basis of a local recognition of their importance, rather than through a strict, criteria-based scoring process. This recognises the balanced approach to growth defined by the Framework objectives. Identifying priority locations for investment purely based on housing numbers or employment outputs would underplay the importance of smaller-scale projects and other initiatives that will have a longer term impact on perceptions of the area and its attractiveness to investors.

Defining Significance

4.3 In total 75 individual projects or interventions have been identified across East Kent. The projects identified vary considerably in terms of type and scale, and include residential, commercial, mixed use and infrastructure projects.

4.4 In order to help frame future priorities, a tiered approach has been adopted which differentiates between projects which are ‘strategically significant’ (i.e. those important to growth in East Kent overall) and ‘locally significant’ (i.e. those important to growth in an individual local authority). Strategically significant projects would generally be afforded greater priority over locally significant projects. The broad criteria that have been applied for each of these categories are summarised in Table 4.1 below.

Table 4.1 Project Significance Criteria

Strategically significant (for East Kent)	Locally significant (for local authority)
<ul style="list-style-type: none"> • Projects and initiatives that are integral to supporting growth of the East Kent economy as a whole • Impacts not only benefitting individual local authority areas but also the wider sub-region • Generally larger in scale, longer term projects, which unlock growth opportunities across a ‘larger than local’ area • Enhance ability of East Kent to compete for investment and development opportunities at a national and international level. 	<ul style="list-style-type: none"> • Projects and initiatives that are important to achieve individual local authority’s growth objectives • Impacts generally not extending beyond the local area • Generally smaller scale projects to address local constraints and opportunities • Ability to enable local authority to remain competitive at an East Kent level.

Source: Lichfields

4.5 The list of identified projects and their contribution to the Framework strategic objectives is set out in Table 4.2, with additional supporting information contained at Appendix 2. It is important to note that this is not intended to be a ‘fixed’ list, but rather one that can be continually reviewed and updated as new information becomes available and individual projects progress.

- 4.6 The current funding position of these projects varies and will evolve over time as new funding rounds are released. For example, a number of projects in East Kent were included as part of the recent £102 million Local Growth Fund Round 3 investments by Government through the South East Local Enterprise Partnership.¹⁵ These grant awards are set out later in this section. For projects where funding needs are yet to be defined, more detailed business cases will be developed to assist with their delivery.

¹⁵ <http://www.southeastle.com/news/article/102m-cash-boost-for-south-east-local-enterprise-partnership-to-help-create>

Table 4.2 Alignment of Identified Projects with Framework Objectives (shown alphabetically by local authority area)

	Project Name	Location	Scheme Type	Significance	Alignment with Framework Objective(s)			
					1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
1	Ashford Town Centre Transformation Project:	Ashford	Infrastructure	Strategic	✓			✓
2	<i>Ashford Commercial Quarter</i>	Ashford	Mixed	Strategic		✓	✓	✓
3	<i>Ashford College Campus</i>	Ashford	Mixed	Strategic	✓	✓	✓	✓
4	<i>Elwick Place</i>	Ashford	Mixed	Local			✓	✓
5	<i>Southern Expansion Quarter / Victoria Way</i>	Ashford	Mixed	Local	✓	✓	✓	✓
6	Jasmin Vardimon	Ashford	Commercial	Local		✓	✓	✓
7	Ashford Designer Outlet Expansion	Ashford	Commercial	Strategic		✓	✓	✓
8	Chilmington Green	Ashford	Mixed	Strategic	✓	✓	✓	✓
9	M20 Junction 10A	Ashford	Infrastructure	Strategic	✓		✓	
10	Ashford International Station	Ashford	Infrastructure	Strategic	✓		✓	
11	Newtown Works	Ashford	Mixed	Local	✓	✓	✓	✓
12	Conningbrook housing and water park	Ashford	Mixed	Strategic	✓			✓
13	Canterbury Knowledge City:	Canterbury	Mixed	Strategic	✓	✓	✓	✓
14	<i>Kent Medical School & Research Complex</i>	Canterbury	Commercial	Strategic		✓	✓	
15	<i>Canterbury Innovation Centre II</i>	Canterbury	Commercial	Local		✓	✓	
16	<i>"Makers Space" and "Hot House"</i>	Canterbury	Commercial	Local		✓	✓	
17	<i>Canterbury Christ Church University EDGE Project</i>	Canterbury	Mixed	Strategic		✓	✓	
18	<i>Herne Bay Business Centre</i>	Canterbury	Commercial	Local		✓	✓	
19	A28 Corridor:	Canterbury	Infrastructure	Strategic	✓		✓	
20	<i>Milton Manor Roundabout</i>	Canterbury	Infrastructure	Local	✓		✓	
21	<i>A2 slip at Bridge</i>	Canterbury	Infrastructure	Local	✓		✓	
22	<i>A2 offslip and park & ride relocation</i>	Canterbury	Infrastructure	Local	✓		✓	
23	<i>Wincheap Traffic Management Scheme</i>	Canterbury	Infrastructure	Local	✓		✓	✓

	Project Name	Location	Scheme Type	Significance	Alignment with Framework Objective(s)			
					1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
24	<i>Sturry Link Road</i>	Canterbury	Infrastructure	Strategic	✓		✓	
25	<i>Sturry Rd Integrated Transport Package</i>	Canterbury	Infrastructure	Local	✓		✓	
26	<i>Canterbury Eastern Bypass</i>	Canterbury	Infrastructure	Strategic	✓		✓	
27	Canterbury Western Link Road	Canterbury	Infrastructure	Strategic	✓		✓	
28	Herne Bay Marina	Canterbury	Mixed	Local	✓	✓	✓	✓
29	Whitstable Park & Ride	Canterbury	Infrastructure	Local	✓			✓
30	Whitfield:	Dover	Mixed	Strategic	✓	✓	✓	✓
31	<i>Sewerage and Water Infrastructure</i>	Dover	Infrastructure	Local	✓		✓	
32	<i>Bus Rapid Transit Scheme</i>	Dover	Infrastructure	Local	✓		✓	
33	White Cliffs Business Park (Phase 3)	Dover	Mixed	Local		✓	✓	✓
34	Dover Town Centre public realm and place making Improvements	Dover	Mixed	Local			✓	✓
35	Dover Waterfront	Dover	Mixed	Local			✓	✓
36	Former Connaught Barracks	Dover		Local		✓	✓	✓
37	Discovery Park, Sandwich	Dover	Mixed	Strategic		✓	✓	✓
38	A2 Duke of York Roundabout Improvements	Dover	Infrastructure	Strategic	✓		✓	
39	A2 Improvements – dualling between Lydden & Dover Town	Dover	Infrastructure	Strategic	✓		✓	
40	Dualling of the remainder of the A256 and improved connections to the A258	Dover	Infrastructure	Strategic	✓	✓	✓	✓
41	Betteshanger Sustainable Park	Dover	Commercial/Mixed	Local		✓	✓	✓
42	Open Golf Championship at Sandwich	Dover	Mixed	Strategic	✓			✓
43	Folkestone Seafront & Town Centre:	Shepway	Mixed	Strategic	✓	✓	✓	✓
44	<i>Folkestone Harbour and Seafront</i>	Shepway	Mixed	Strategic		✓	✓	✓
45	<i>Folkestone Creative Quarter</i>	Shepway	Commercial	Local		✓	✓	✓
46	<i>Folkestone Townscape Heritage Initiative</i>	Shepway	Mixed	Local			✓	✓
47	<i>Former Gasworks, Ship Street</i>	Shepway	Mixed	Local	✓			✓
48	<i>Shearway Business Park - Bigginwood/Caesars Way</i>	Shepway	Mixed	Local	✓	✓		

	Project Name	Location	Scheme Type	Significance	Alignment with Framework Objective(s)			
					1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
49	<i>Park Farm Industrial Estate - Former Silver Spring site</i>	Shepway	Commercial	Local	✓	✓		
50	East Kent College Folkestone Campus extension	Shepway	Mixed	Local		✓	✓	
51	Princes Parade, Hythe	Shepway	Mixed	Local		✓		✓
52	Romney Marsh Regeneration:	Shepway	Mixed	Strategic	✓	✓	✓	
53	<i>Mountfield Road Industrial Estate/South New Romney</i>	Shepway	Mixed	Local	✓	✓	✓	
54	<i>London Ashford Airport</i>	Shepway	Mixed	Strategic	✓	✓	✓	
55	Operation Stack Lorry Area	Shepway	Infrastructure	Strategic	✓		✓	
56	Otterpool Park /M20 Junction 11	Shepway	Mixed	Strategic	✓	✓		✓
57	<i>Westenhanger Rail Station upgrade</i>	Shepway	Infrastructure	Strategic	✓		✓	
58	Port of Ramsgate	Thanet	Infrastructure	Strategic	✓	✓	✓	✓
59	Thanet Parkway Station	Thanet	Infrastructure	Strategic	✓		✓	✓
60	Inner Circuit Improvement Strategy	Thanet	Infrastructure	Strategic	✓		✓	✓
61	<i>Westwood relief strategy</i>	Thanet	Infrastructure	Local	✓		✓	✓
62	Margate Junction improvements	Thanet	Infrastructure	Local	✓		✓	✓
63	Advanced Manufacturing Park (Manston Business Park)	Thanet	Commercial	Strategic		✓	✓	
64	Creative Industries Workspace	Thanet	Commercial	Strategic		✓	✓	✓
65	Feasibility Modelling for Ramsgate, Margate and Viking Bay	Thanet	Commercial	Local	✓	✓	✓	✓
66	<i>Ramsgate Heritage Action Zone</i>	Thanet	Commercial	Local				✓
67	<i>Theatre Royal</i>	Thanet	Commercial	Local				✓
68	<i>Dreamland and Sunshine Cafe Redevelopment</i>	Thanet	Commercial	Local				✓
69	<i>Viking Bay</i>	Thanet	Commercial	Local				✓
70	EuroKent Business Park	Thanet	Mixed	Strategic		✓	✓	
71	Agri-Tech Hub	Thanet	Commercial	Local			✓	
72	East Kent College Broadstairs Campus extension	Thanet	Mixed	Local			✓	
73	East Kent Increased rail capacity and journey times	East Kent	Infrastructure	Strategic	✓		✓	✓

	Project Name	Location	Scheme Type	Significance	Alignment with Framework Objective(s)			
					1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
74	Business funding support – Kent & Medway Business Fund	East Kent	Infrastructure	Strategic			✓	
75	Upgrading broadband	East Kent	Infrastructure	Strategic	✓		✓	✓

Source: Local authorities / Lichfields analysis

Note: projects in *italics* represent subsidiary projects which are linked to or required in order to deliver the headline project; the numbering of projects does not infer any prioritisation of projects

Spatial Priorities

4.7 Table 4.3 below provides a summary of the identified projects by area, significance and contribution to strategic objectives.

Table 4.3 Overview of Projects

Place	Total projects	Strategically significant	Locally-significant	Alignment with strategic objective(s)			
				1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Productivity within Business	4. Place Making and Shaping
Ashford	12	8	4	8	7	10	10
Canterbury	17	7	10	12	7	16	4
Dover	13	7	6	7	6	12	9
Shepway	15	7	8	10	11	10	7
Thanet	15	6	9	6	5	10	11
East Kent wide	3	3	0	2	0	3	2
Total	75	38	37	45	36	61	43

Source: Lichfields analysis

4.8 A total of 36 projects have been identified as being strategically-significant for the future economic growth of East Kent. These are distributed across all parts of East Kent and underline that there are opportunities in each local authority to contribute to the overall potential of East Kent. These projects are summarised as follows:

- **Ashford** : Ashford Town Centre Transformation Project, Ashford Commercial Quarter, Ashford College Campus, Chilmington Green, M20 Junction 10A , Ashford International Station and Ashford Designer Outlet Expansion.
- **Canterbury**: Canterbury Knowledge City, Kent Medical School and Research Complex, Canterbury Christ Church University EDGE Project, A28 Corridor, including the Sturry Link Road and Canterbury Eastern Bypass and Canterbury Western Link Road.
- **Dover**: Whitfield, White Cliffs Business Park (Phase 3), Discovery Park at Sandwich, A2 improvements (including improvements to Brenley Corner in the neighbouring district of Swale), including Duke of York roundabout and dualling between Lydden and Dover Town and the dualling of the remainder of the A256 and improved connections to the A258.
- **Shepway**: Folkestone Town Centre and Seafront , including Folkestone Harbour and Seafront development, Romney Marsh regeneration, including the development of London Ashford Airport, Westenhanger Lorry area, Otterpool Park Garden Town around M20 Junction 11 and Westenhanger rail station upgrade.
- **Thanet**: Port of Ramsgate, Thanet Parkway Station and Inner Route improvements, Advanced Manufacturing Park at Manston Business Park, Creative Industries workspace and developing out EuroKent Business Park.
- **East Kent wide**: Upgrading broadband, rail capacity and journey time improvements and business support funding

4.9 In addition, 37 locally-significant projects have also been identified many of which have a supporting role as components of delivering the strategically-significant projects.

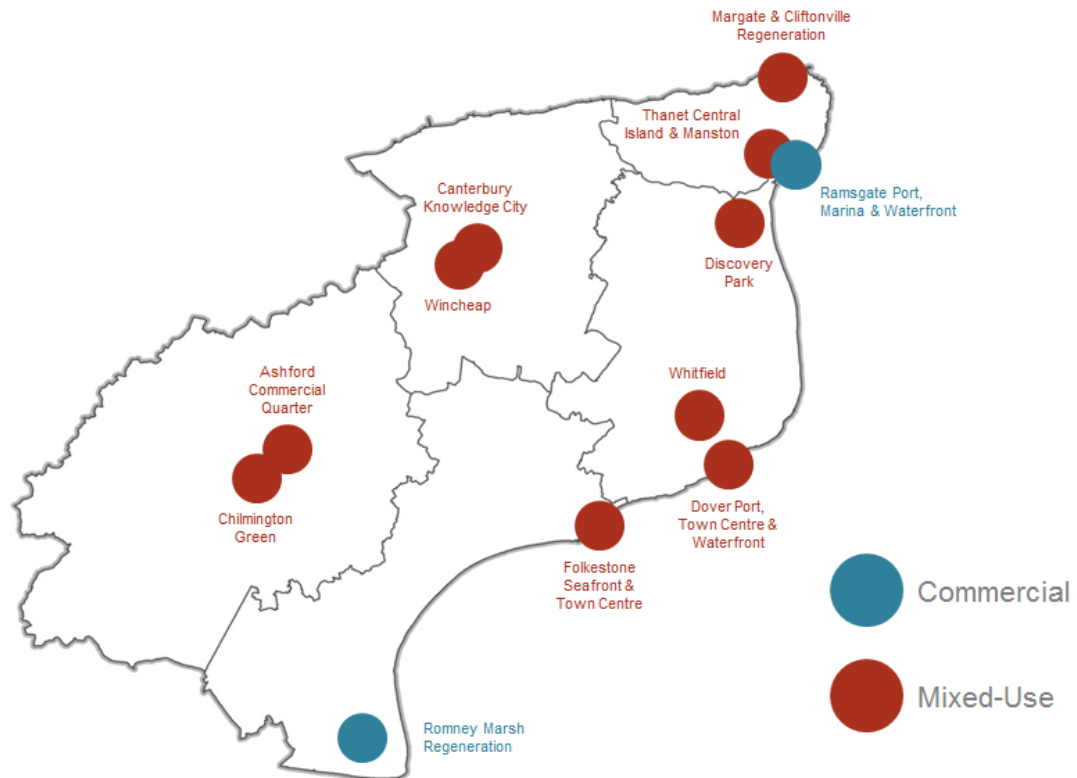
Meeting the Strategic Objectives

- 4.10 As detailed in Table 4.3, the identified projects contribute to meeting a range of the Framework's strategic objectives with some particular examples summarised below:
- 1 **Unlocking growth through infrastructure:** Chilmington Green, M20 Junction 10A, Ashford International Station, , Ashford Town Centre Transformation Project, A28 corridor projects, Herne Bay Marina, Whitfield (Dover) and upgrades to the A2 and A256, M2/A2/A299 Brenley Corner along with the dualling of the A2 from Lydden to Dover, Otterpool Park garden town and related transport infrastructure upgrading (including Westenhanger railway station), Port of Ramsgate, Thanet Parkway Station and Inner Route circuit improvements, including Westwood Relief Road and Margate Junction improvements.
 - 2 **Delivery of business space:** Ashford Commercial Quarter, Ashford Designer Outlet Expansion, Chilmington Green, Canterbury Knowledge City, Whitfield, White Cliffs Business Park (Phase 3), Folkestone Harbour and other employment sites in the town, Mountfield Road Industrial Estate, Otterpool Park, Creative Industries Workspace and advanced manufacturing park at Manston.
 - 3 **Supporting productivity within business:** Ashford College Campus, Canterbury Knowledge City, Discovery Park, Mountfield Road industrial estate, Otterpool Park, Creative Industries Workspace and the Advanced Manufacturing Park at Manston.
 - 4 **Place-making and shaping:** a number of Ashford town centre and urban extension/housing projects, Canterbury Knowledge City, Herne Bay Marina, Dover Town Centre and Waterfront, Whitfield and Discovery Park, Folkestone Town Centre and Seafront, Otterpool Park garden town, Creative Industries Workspace (Thanet), Thanet Parkway, Inner circuit improvements including Westwood Relief Strategy and Margate Junction Improvements and Feasibility Modelling for Ramsgate, Margate and Viking Bay.

Spatial Priorities

- 4.11 Considerable progress has been made over the last few years to deliver the various strategic priorities and locations identified in the 2013 East Kent Growth Plan. Whilst the extent of this progress inevitably varies across East Kent and between the individual projects, a combination of private and public sector investment has helped to bring forward a range of development projects that have started to deliver against the 2013 Growth Plan's target for new jobs and additional homes.
- 4.12 All of these opportunities provide the potential to further transform the growth and prosperity of East Kent over the coming years, although a number of projects, such as Chilmington Green (in Ashford), Otterpool Park (in Shepway) and Whitfield (in Dover) will take a number of years to fully deliver, and therefore represent longer term priorities for the EKGf over the next 10 years and beyond.
- 4.13 The location of the twelve spatial priorities and locations is shown in Figure 4.1 below.

Figure 4.1 Location of 2013 East Kent Growth Plan Spatial Priorities



Source: Lichfields

4.14 The progress of projects that continue to be a high priority and which are continuing to be delivered is summarised below and those that are new to this Growth Framework are also outlined.

Ashford

4.15 Within the East Kent Growth Plan, “Open for Growth” 2013, there were two spatial priorities for the Borough of Ashford - Ashford Commercial Quarter and Chilmington Green, along with two strategic infrastructure projects, M20 Junction 10A, and the Ashford International Station Project. Within the Commercial Quarter spatial priority, now known as Ashford Town Centre Transformation Project, there are a number of key sites around the Ashford International Station that were incorporated within this spatial priority. Significant progress has been made on delivering these projects in the last 4 years, with many now on site delivering housing growth and commercial development to stimulate the East Kent economy

(1) Ashford Town Centre Transformation Project

4.16 With 5 key developments being delivered within Ashford Town Centre over the next few years, which could create over 1,200 homes and 1,000 jobs, this project also delivers improvements to existing junctions, parking, and to the public realm and pedestrian movement between Ashford International Station and the town centre. These improvements will release capacity within the highways network as well as improving the environment within this core area of the town. Funding has been secured through Section 106 to deliver some of the work that is being taken forward in 2017/18, but further funding is required to deliver further improvements beyond this first phase. This project just fell outside the allocation of funding in LGF Round 3.

(2) Ashford Commercial Quarter

- 4.17 The Ashford Commercial Quarter development provides the potential for up to 80,000 m² of office development alongside 2,500 m² of retail / leisure and 150 homes. This strategic site right next to Ashford International Station has the potential to be a key driver of employment growth in Ashford and East Kent over the next decade. Ashford Borough Council acquired key land holdings within this site from the Homes and Communities Agency in April 2014 to drive forward the development of new offices. First phase public realm works have been completed and a development partner was sought for the first office building of 7,500m². Quinn Estates and George Wilson holdings are now developing the first phase building. Works started in January 2017 and are due to complete in Spring / Summer 2018. This new office building has the potential to house over 500 jobs as the first phase of this dynamic new quarter, and establish a thriving new town centre office market within Ashford

(3) Ashford College Campus

- 4.18 The Hadlow Group took over the ownership of West Kent and Ashford College in August 2014 from the K College group, following a competitive process. Plans for the new 7,106 m² Ashford College Campus were then taken forward on the Elwick Road site alongside the redevelopment of the current Jemmett Road Ashford Campus. The new Elwick Road campus is to be delivered in two phases (Phase 1 and Phase 1a) at a total cost of £25.8 million. £5 million was secured from the Skills Funding Agency (SFA), £9.8 million was secured with the support of other East Kent Partners from the SE LEP Skills Capital Fund and further funding has been secured from Ashford Borough Council, the SE LEP Equipment Fund and the sale of the Jemmett Road site.

- 4.19 Phase 1 started construction in January 2016, and is due to open for students in September 2017, with Phase 1a due to start early 2018 and be open in early 2019. This provides a strategic investment in education and training in the Ashford area, with a further £14 million Phase 2 higher education facility planned to be delivered on the Elwick Road campus within the next 5 years.



(4) Elwick Place

- 4.20 This 26,900 m² leisure led town centre development will deliver a new Cinema, 8 restaurants and bars, and a 60 bedroom hotel in Phase 1. The site is being delivered by Stanhope Plc in partnership with Ashford Borough Council who acquired the site at the end of 2015. Planning permission for phase 1 was granted in December 2015. Work has started on site in May 2017 and will be completed in 2018.



(5) Southern Expansion Quarter / Victoria Way

- 4.21 Two town centre sites on Victoria Road in Ashford will deliver 860 new homes and over 200 jobs within the town. Plans being brought forward for 660 homes on the former Powergen site by Quinn Estates, in partnership with Neighbour and GRE will start the development in 2017. A further scheme by U +I on a site opposite the International Station will see a new Aldi food store, Chapel Down Brewery, 200 homes and a 120 bed hotel on this prominent site. This site will also see development started in 2017. There is also the potential for further regeneration and development to bring forward additional homes, parking and jobs to transform this area of the town and its relationship to Victoria Park.

(6) Jasmin Vardimon

- 4.22 Jasmin Vardimon Dance Company moved to Ashford in 2012 and the company now wishes to expand the work already undertaken to deliver a JVC International Dance Academy alongside space and support for creative industry businesses. Ashford Borough Council, Kent County Council and the Arts Council are working with the company to develop their plans with early feasibility work underway.

(7) Ashford Designer Outlet Expansion

- 4.23 Ashford Designer Outlet was originally opened in 2000 attracting shoppers from across the region to purchase discounted premium brands. McArthur Glen received planning permission in September 2016 for an additional 100,000 sq. ft. of space, 38 new units, with the potential to create a further 500 jobs. Work is expected to start on site by the end of 2017, with the new parts of the centre completed in 2019.

(8) Chilmington Green

- 4.24 Chilmington Green is a new urban extension on the edge of Ashford town, based firmly on Garden city principles. The scheme includes up to 5,750 residential units; up to 10,000 m² of class B1 uses; 9,000 m² retail and leisure; a secondary school, 4 primary schools; and parks and open space. Planning permission has now been granted and infrastructure works are now underway.

- 4.25 As part of the delivery of this urban extension, improvements to the A28 are required at an estimated cost of £32 million. £10.2 million of funding was secured through the SE LEP Local Growth Fund to ensure this development could be progressed. Works to deliver this road infrastructure project are due to start in 2018/19.



(9) M20 Junction 10A

- 4.26 This new junction will be located a short distance east of Junction 10 of the M20 and will act to provide additional highways capacity to unlock substantial new development in Ashford and the wider area. This scheme is being delivered by Highways England as part of their strategic programme, and is being funded through £19.7 million of SE LEP Local Growth Fund, developer contributions and Highways England funding. This new junction has the potential to unlock approximately 5,000 jobs and 7,000 homes.
- 4.27 This scheme is classified as a National Significant Infrastructure Project (NSIP) and consequently Highways England submitted a Development Consent Order (DCO) in the summer of 2016 to the Planning Inspectorate. The Inspectorate have been undertaking the process of considering this application during 2017 and will report their recommendations to the Secretary of State for a final decision. If approved, works are likely to start on site in 2018, with the new junction opening in 2019.
- 4.28 One of the sites that will be unlocked by the delivery of Junction 10A is the Stour Park development at Sevington, a 1.6 million sq. ft. industrial development. This development was approved by planning committee in 2016, with development due to be taken forward in conjunction with the delivery of the new junction.

(10) Ashford International Station (Ashford Spurs)

- 4.29 Upgrading the signalling at Ashford International Station will mean that the next generation of Eurostar trains - and any future European rail operators - can continue to stop at the station. This £10.5 million project is now fully funded through the Local Growth Fund, from the project partners Ashford Borough Council, Kent County Council, Network Rail, Eurostar and HS1 and from the EU



through the Regions of Connected Knowledge project. Due to be delivered in spring 2018, it will maintain Ashford's place at the heart of Europe's transport network and safeguard direct high-speed international services which benefit the whole of the East Kent economy

(11) Newtown Works

- 4.30 This former railway works site is centrally located close to Ashford Town Centre and is home to the longest listed railway buildings in the country. This mixed-use development site has the potential to deliver an additional 450 homes and substantial employment space within the site and its historic buildings. This site provides the opportunity to deliver a high quality development which celebrates the town's railway heritage, but due to the nature of the sites previous uses and the need to restore the listed buildings, further funding will be required to bring forward this unique opportunity.

(12) Conningbrook housing and water park

- 4.31 A new country park and water sports venue alongside 300 new homes will create a new regional park for residents of Ashford and East Kent. The Clarion Housing Group is taking forward the 31 acre housing site at Conningbrook Lakes to build 300 quality homes. Funding from the residential developments will help fund facilities at the new country park operated by Ashford Borough Council, which opened in 2015. With the beautiful lakeside setting and network of country trails this project provides a unique piece of community infrastructure that will help deliver growth and improve the attractiveness of the area.

Canterbury

(13) Canterbury Knowledge City

- 4.32 This programme comprises a number of projects that seek to improve the supply of high quality business space and facilities that will promote business development, high level skills and support productivity. In each case funding assistance will be required to support delivery.
- 4.33 To date a number of successes in the district can be reported including £6.1 million from the Local Growth Fund for a new engineering, science and technology centre for Kent and Medway supporting high-value employment, growth and investment in engineering and technology businesses – the (17) Canterbury Christ Church University EDGE Project. Although based in Canterbury, this will have satellite facilities across Kent including East Kent.
- 4.34 Future development will focus on a number of key schemes which emphasise the aspiration for more first class facilities including:
- **(14) Kent Medical School & Research Complex** – to develop a much needed medical complex to deliver clinical capacity, training and research to support medical services across the county. This will support the delivery of healthcare services including hospitals, satellite clinics and the wider community. It will help equip East Kent with the necessary healthcare infrastructure it needs to continue to grow and expand economically. The project would complement the University of Kent's existing activities in health and bio-medical related research and Canterbury Christ Church University postgraduate medical programmes. With this strong healthcare presence, combined with specialist facilities, expert clinical staff and potential talent pool East Kent should have a greater role in strengthening and expanding Kent's life-sciences sector and BioGateway network. Linked to the complex will also be opportunities to develop a surrounding science/research environment that would attract complementary commercial activities;
 - **(15) Canterbury Innovation Centre II** – to build a second innovation centre which replicates the successful formula of the existing facility and will provide more serviced offices/workshops for innovative firms;
 - **(16) New “Makers Space” and “Hot House”** – to provide specialist facilities and equipment for new makers, creatives, programmers, scientists and engineers;
 - **(18) Herne Bay Business Centre** – to meet the continuing need for industrial/office space for small firms along the north Kent coastal corridor.
- 4.35 These projects will also be complemented by other activities that are being pursued by other partners. The University of Kent, for example, is currently consulting on its concept Master Plan which sets out a vision for its Canterbury campus over the next 50 years. This would create a 'garden' type campus that will provide developments such as new business innovation units, enabling synergy between university research and the creative industries. Its growth plans will

introduce new Bio-tech and Molecular Medicine 'super centres' to its Canterbury campus, which will help reinforce its status as a top 20 UK university and global research body.

(19) A28 Corridor

- 4.36 This programme of eight separate but connected transport infrastructure projects aims to make vital improvements along the A28 road which links Thanet in North East Kent to southern Kent and East Sussex via the City of Canterbury. It comprises projects that are of both 'strategic' (East Kent) and local significance.
- 4.37 The A28 road is currently subject to regular congestion, bottlenecks and consequently serious delays are commonplace particularly north of Canterbury at the Sturry level crossing and along the city's ring road where local and other traffic from multiple locations converge. To help address this in a comprehensive way, the programme includes major improvements to the A2 (London to Dover road) which serves Canterbury at three points, including a junction with the A28 to relieve pressure on the A28 corridor. Improvements are vital if Canterbury is to adequately manage current and future transport demand. The package of enhancements is also essential in unlocking thousands of new homes, commercial space and other facilities/amenities at major, planned development sites north and south of Canterbury.
- 4.38 Considerable progress has been made with this programme since the last East Kent Growth Plan. Five of the eight projects have all or partial funding secured including almost £11million from Local Growth Fund Rounds 1 and 3. At the same time many tens of millions of pounds of investment are being secured/levered from the private sector towards local road infrastructure. Projects that have evolved significantly include:
- **(24) Sturry Link Road, Canterbury** – this new link road will connect the A28 Sturry Road to the A291 Sturry Hill and requires a crossing of both the railway and the river. £5.90 million of LGF money is leveraging £23.70 million of private sector match funding from a consortium of local developers to finance this vital bypass/crossing project. Pre-planning is now underway and with all necessary consents in place. Construction will start in spring 2019 with a 18 month construction period. The scheme will directly unlock 720 homes at Sturry/Broad Oak and will support the delivery of thousands of other homes and jobs north of Canterbury at Hersden and Herne Bay, as well as helping to address congestion problems along the A28 corridor north of Canterbury.
 - **(25) Sturry Rd Integrated Transport Package, Canterbury** – this project will extend an in-bound bus lane thereby complementing the Sturry Link Road. Plans are currently being amended with an adjusted route proposed. With consents in place, work could take place in 2017/18 with a 4 month construction period. At a cost of £0.55m (including £0.3 million LGF) the scheme will support new strategic sites and enable decongestion of the challenging area of the A28 corridor.
 - **(21) A2 junction at Bridge, Canterbury** – at a cost of £25million this new infrastructure will be funded by a private sector developer to support the delivery of the district's largest strategic site and urban extension - Mountfield Park. Outline planning consent has been secured with a first phase of homes to get underway shortly. The new junction will directly support the delivery of 4,000 homes together with a 70,000m² business park and other facilities in this new community.
 - **(22) A2 offslip and Park & Ride, Wincheap, Canterbury** –this comprises two projects in the A28 Corridor programme with £8.8 million secured (including £4.4million from Round 3 of the Local Growth Fund) to deliver a new A2 offslip on to the A28 and a relocation of the park & ride facility. Full designs are in place and once

developed this will support wider regeneration and new development projects that will deliver 1,685 jobs and 68,333m2 retail/office space, as well as leveraging other private sector funding for wider transport enhancements. The **(23)Traffic Management Scheme for Wincheap** will form part of these wider improvements, although the scheme design and funding package is yet to be formulated and agreed.

4.39 To help continue the A28 Corridor Programme, the East Kent Growth Framework will seek to ensure that the above projects are delivered while focusing on other longer term aspirational enhancements which could also help unlock and support growth. These projects comprise:

- **(20) Milton Manor Roundabout upgrade** – improvements to help manage the impacts of new local developments along the A28 corridor south west of Canterbury;
- **(27) Canterbury Western Link Road** – to improve future access from an expanded University of Kent campus to the A2 road west of Canterbury; and
- **(26) Canterbury Eastern Bypass** – to divert non local A28 and A257 traffic away from Canterbury City on to a new A2 road junction, south east of Canterbury. Although this scheme is identified in the emerging District Local Plan, due to the significant costs involved (£80 million +) the project is not currently deliverable through existing developer contributions. However, it will be a longer-term strategic East Kent priority in terms of its ability to potentially unlock significant housing and commercial growth in future development plans and to enable more efficient movement of traffic through north East Kent. Therefore a funding solution requiring a combination of future developer contributions and Government investment will need to be explored.

(28) Herne Bay Marina

4.40 There is an aspiration for a Marina at the seaside town of Herne Bay. This will help address an unmet need for new marina capacity in north east Kent as well as providing new commercial space for the town. This place making and shaping initiative will also complement long-term ongoing work to regenerate and renew the town centre. Herne Bay is expected to experience significant growth over the next twenty years with thousands of new homes in the pipeline, complemented by new business parks and community facilities.

(29) Whitstable Park and Ride

4.41 This £2 million project would help manage traffic volumes at this seaside town thereby accommodating and supporting its ongoing and future growth.

Dover

(30) Whitfield

4.42 Whitfield is a major urban extension at Dover, capable of providing up to 5,750 new homes (with 3,000 delivered by 2026) and a range of associated community facilities. The 2013 East Kent Growth Plan noted that whilst Whitfield will make a major contribution towards East Kent's future growth, the site is challenging to develop. Particular infrastructure priorities include a major new roundabout access onto the A2, which is currently scheduled for completion in 2017. In addition, a priority bus system known as a Bus Rapid Transit System (BRT) is also considered essential to provide sustainable connectivity to Dover town centre.

4.43 The Whitfield Urban Expansion (WUE) Supplementary Planning Document (SPD) was adopted in April 2011 and outline planning permission for 1,250 homes has been granted under Phase 1

of the WUE. A reserved matters application for 94 dwellings (under sub phase 1a) has been approved and a number of houses are now under construction along with the A256 roundabout.

4.44 Work is also well under way on the Abbey homes development on the land east of the Sandwich Road. Planning permission was granted for 74 dwellings; 37 units are completed and 21 are under construction this monitoring year. An application for Phase 2 of the WUE comprising 1,190 dwellings in the areas of Parsonage Whitfield and Shepherd's Cross (areas identified in the Whitfield SPD) has been submitted. A further application for the erection of 133 dwellings off the south side of Singledge Lane has been received within the monitoring period and has recently been refused. A further application for 100 units has recently been submitted.

4.45 Whilst progress is now being made to deliver the Whitfield Urban Expansion, with the commencement of the general market component of Phase 1a, the timetable for the delivery of the urban expansion is some 3-4 years behind the Core Strategy Programme.

4.46 From a more commercial perspective, the White Cliffs Business Park (located within the wider Whitfield area) represents Dover's premier employment site and benefits from a large quantum of readily available developable land and excellent road access onto the A2. Phase II of the business park has outline permission and a masterplan, with several applications now in process. These include a new Lidl Supermarket, which has recently been approved and is under construction, along with a District wide Leisure Centre which has recently secured consent. The BRT is also provides a major foundation to the future uses at White Cliffs Business Park and a legal Agreement has recently been completed to facilitate the delivery of the infrastructure.

(34) Dover Town Centre public realm and place making improvements and (35) Dover Waterfront

4.47 This spatial priority consisted of a number of elements including the expansion of Dover Port (including the development of Terminal 2 and associated infrastructure improvements) and mixed use developments at Dover Waterfront, Dover Mid-Town and St James. The Port of Dover's development of a revised proposal at Terminal 2, known as the Dover Western Docks Revival Project (DWDR), has commenced on site and represents a £0.25 billion investment. Aside from substantial construction opportunities, the DWDR will provide and retain 600 jobs in the first phase which will provide a new cargo terminal and logistics facility along with much better leisure and recreational facilities. It will also provide a new marina, pier and marina arm along with the foundations for a comprehensive regeneration opportunity on the marina arm and Dover Waterfront around Wellington Basin which becomes surplus to Port uses.

4.48 The St James development is set to transform the leisure and retail offer in Dover, with a six screen Cineworld cinema, 108-bed Travelodge hotel, 16,000 sq. ft. M&S Simply Food store, along with a mix of retail and restaurant/café units. Following a site wide demolition programme, archaeology, decontamination and remediation, construction proper has commenced. Piling works, which comprise a collective total of some 10.3 miles of bored piles, have been completed and the subsequent construction of mixed-use retail and leisure buildings is well advanced. The scheme is anticipated to generate around 720 jobs, with scheme completion expected in late 2017/early 2018.

4.49 The Dover Waterfront area consists of sites allocated in the District Council's Adopted Core Strategy including Waterloo Crescent, Wellington Dock and the new Marina Curve planned within the Port's approved DWDR. An internationally renowned team of consultants have recently been appointed by Dover District Council, the Port of Dover and a major land owner in the area to develop a planning and regeneration framework for the development and regeneration of the wider Dover Waterfront area. The framework will build, strengthen and link into many of the plans and initiatives already underway in the town, including the St James

retail and leisure development. The recently completed Dover Economic Development Needs Assessment estimates that the retail and leisure-led redevelopment of Dover Waterfront could generate approximately 1,930 jobs across the retail, hospitality and leisure sectors.

(36) Former Connaught Barracks

- 4-50 The former Connaught Barracks site was declared surplus to military requirements in 2007 and is now owned by the Homes and Communities Agency. The overall site comprises Connaught Barracks (12.5 hectares), a scheduled monument called Fort Burgoyne (approximately 10 hectares, playing fields (around 9 hectares and a former training area (around 24 hectares) designated as a Local Wildlife Site.
- 4-51 Fort Burgoyne and surrounding land has been transferred to the Land Restoration Trust and a major programme of demolition has been undertaken on the remainder of the part of the site comprising the former barracks site.
- 4-52 The site is defined as a strategic site in DDC's Adopted Core Strategy and an initial planning consent for a small part of the barracks site, known as the Officers' Mess site has been granted for residential use. As yet, this has not been released to the market an proposals for future uses at Fort Burgoyne and the remainder of the barracks site are awaited.

(37) Discovery Park

- 4-53 Formerly 100% occupied by Pfizer as a global research and development facility, Discovery Park is a 99.4 hectare site at Sandwich, including high-quality R&D premises. The site provided 2,400 jobs – many of them very highly skilled – before Pfizer announced its intention to withdraw from Sandwich as part of a global restructuring in February 2011. Given its importance as a nationally-significant centre for R&D, the opportunity that it presents to establish a more diversified scientific research facility, building on the skills still present in the area, as well as the quality of the building stock, Discovery Park was awarded Enterprise Zone status. This brings financial incentives to occupiers and a simplified planning process and has secured additional flood defence investment.
- 4-54 The Enterprise Zone at Discovery Park has been successful at accommodating and diversifying new business growth in the District over recent years, with the site now home to around 150 companies and 2,500 employees. These range from established organisations to start-ups in such fields as life sciences, pharmaceuticals, and biotechnology.
- 4-55 According to the site's operator, 2016 saw over forty new arrivals and expansions at Discovery Park¹⁶. Amongst the latest companies to open offices at the South East's leading science, technology and enterprise hub are SCI Innovative Building Control Systems, Gemini Fundraising and MP Associates. They join Start Up Zone newcomers - Ideal4U Marketing and business growth platform F6S - in taking space within Innovation House, Discovery Park's main hub for entrepreneurs, general and science support companies.
- 4-56 Further investment and job creation is expected at Discovery Park in 2017, including the completion of 70,000 sq. ft. of manufacturing space, with OFP Timber Frames Homes Ltd on course to open its new 22,000 sq. ft. production facility in the first quarter of 2017. With the total number of jobs now past the 2,500 milestone, Discovery Park remains on course to reach a target of 3,000 by the end of this year. Construction of the new £160 million bio-mass facility has also commenced on site and will eventually provide all the power and heating for Discovery Park gets underway.

¹⁶ <http://www.discovery-park.co.uk/news/article/new-arrivals-and-growing-stories-for-businesses-at-discovery-park>

4.57 The recently completed Dover Economic Development Needs Assessment¹⁷ study identifies significant scope for re-development of the site to accommodate a greater critical mass of activity in future, with planning permission in place for a number of development projects (including those listed above). It is estimated that the redevelopment of part of Discovery Park could generate an additional 1,890 jobs by 2037 across a range of sectors including R&D, manufacturing, utilities, wholesale, hospitality, professional services and education.

(41) Betteshanger Sustainable Park

4.58 The Council has been working alongside the Homes and Communities Agency (HCA) to bring forward proposals for the former Betteshanger Colliery and Fowlmead site. The development of Betteshanger Sustainable Parks represents a UK first for investment in green and sustainable business, energy, education and heritage.

4.59 Located on the 121 hectare site of the former East Kent coalfield, the project is led by Hadlow College and will combine a green technologies sustainable business park; world class research & development, and a national visitor destination and learning centre for sustainable energy and mining heritage.

4.60 The development will also build on and foster relationships with the Discovery Park to provide business incubation space. The £40 million first phase has already received public funding of £5 million from the HCA and £2.5 million from the Coastal Communities Fund. A further £11 million in private investment has been agreed in principle with agreed pre-lets. The scheme is set to bring over 1,000 jobs to East Kent and a multi-million pound boost for economic and social regeneration. A planning application has been approved for a new visitor centre and construction is currently underway and expected to be finished spring 2018. In tandem with this, planning consent has recently been granted for the first development, a preventative health incubation hub, on the business park with master planning continuing for the remainder of the site.

(42) Open Golf Championship

4.61 The District Council has been working with KCC, SELEP and partners across East Kent along with the Royal and Ancient Golf Club and Royal St George's Golf Club at Sandwich to bring the Open Golf Championship back to the area in 2020. The Open brings significant economic benefits and international recognition. However, major improvements are required to infrastructure, particularly at Sandwich Station, to enable the successful transport plan to be put in place in circumstances where the expectation is on a significantly increased attendance.

Shepway

(43) Folkestone Seafront and Town Centre

4.62 Folkestone is continuing to gain an international reputation for culture and creativity (the Creative Quarter and Folkestone Triennial), heritage (Townscape Heritage initiatives, Folkestone Airshow) and the coast (coastal parks, sea sports, fisheries and eateries). The attractiveness of the area as a place to both visit and live, combined with good accessibility via HS1, is making the town increasingly attractive to businesses in the IT, Creative and Digital Media sector.

4.63 The new seafront development will bring new high quality accommodation into the town which will increase footfall and the creative culture is building on the local entrepreneurial spirit. The town centre will become not only a place to shop, but also an area for recreation with museums,

¹⁷ Dover Economic Development Needs Assessment, March 2017 (Lichfields)

high quality parks and public art. Attracting new employment into high quality modern office accommodation and continuation of investment in existing hotels to support tourism by extending the local offer to boutique and four star hotels is marking the renaissance of the town

(44) Folkestone Harbour and Seafront

4.64 The delivery of the Folkestone Seafront development, which received outline planning consent in 2015, is now actively underway by Folkestone Harbour Company. The scheme will include public realm improvements, commercial/leisure activities and residential development.

4.65 A £5 million Local Enterprise Growth Fund contribution secured in 2016 for the project has been used to support the exceptional costs of essential infrastructure on the site, including sea defence work, ground investigation, provision of essential services and public realm



enhancements in readiness for commencement of the site development in 2018. Changes to highways around the site have been made, including implementing the two way operation of Tram Road and Tontine Street (for bus operations) in 2016. Reinforcement of flood defences and beach nourishment is underway, as well as earthworks and connections north-south and

east-west into the scheme.

4.66 The first phase of building works is scheduled to commence in 2018. Excluding construction jobs, some 315 direct FTE jobs are being created and the development will create up to 1000 homes of which 8% will be affordable units.

4.67 Following a £3.5 million renovation, the Folkestone Harbour Arm was opened in 2015 as a public promenade with independent bars, restaurants and cafes, and has rapidly become one of Folkestone’s major visitor attractions with over 80,000 people visiting in just twelve weekends in 2015 and hundreds of thousands of visitors in 2016. The Harbour Arm is an important step towards realising the rejuvenation of the wider harbour and seafront area and is being followed by the restoration of the station and viaduct to open in 2017. The overall seafront scheme is not expected to be finally completed until 2030.

4.68 In close association with the seafront development, and as a further sign of commitment to Folkestone town centre, the Roger De Haan Charitable Trust is funding the construction of a £12 million multi-storey urban sports centre, offering the opportunity to engage in a unique range of sports, including skateboarding, boxing, climbing and bouldering. The centre, thought to be the first of its kind in the world, is expected to open in 2017.

(45) Folkestone Creative Quarter

4.69 The Folkestone Creative Quarter continues to build its profile through the acquisition, conversion and successful letting of a range of accommodation from artists' studios to small business spaces which have created a hub for digital businesses.

Occupancy rates are now high and the businesses operate from a mix of hired deskpace to modular offices. The success of this activity has begun to change the perception of a



rundown area of the town through attracting artists and media/digital industries and creating employment that is expected to total some 300 jobs. There are signs of more market-led interest in this area which suggests the area is gaining a more positive identity for creative industries, but it remains essential that there is no dilution of the standard set by the Creative Foundation and others in sharing the vision for this part of the town.

4.70 A major festival of the arts, the Folkestone Triennial, commences in September 2017 to bring well known artists and their exhibits to the town over a nine-week period.

(46) Folkestone Townscape Heritage Initiative

4.71 This scheme covered parts of the Old Town and The Bayle to restore the original facade of properties and improve the landscape surrounding. It has resulted in bringing back into use 6 buildings in the Old High Street. The focus of HLF funding has been the designated conservation area and has involved a series of dissemination events about the history of this area for students and heritage skills workshops for students and wider public.

(47) Former Gasworks, Ship Street

4.72 This 1.56ha site is a former gasworks in central Folkestone which has the potential for developing up to 85 housing units. In 2009 the site was remediated with large scale removal of contamination and structures, but further remediation is required for it to become usable for mixed/residential development.

4.73 The site is the single largest derelict site within Folkestone Town Centre that is not the subject of redevelopment and it falls in one of the most deprived wards in the country. The Council's planning policies have promoted the redevelopment of the site for housing in local plans for several decades. The site already has support from Heritage Lottery Fund through their Great Place Scheme, following a successful bid by the Creative Foundation. This scheme is designed to pilot new approaches that enable cultural and community groups to work more closely together and to place heritage at the heart of communities.

(48) Shearway Business Park – Biggins Wood/Caesars Way

4.74 Shepway District Council acquired in December 2016 the Biggins Wood site - a former brickworks and receptor site for waste - which has planning permission for 77 homes and 5,802 sq. m of commercial office, industrial and storage space (B1 & B8). The council is

currently assessing the options for taking the site forward, with the ambition to commence construction late 2018/early 2019.

- 4.75 There is a further 2.9 acre site alongside the Biggins Wood site on Caesars Way which is allocated in the Local Plan for business, general industrial and Warehouse (use classes B1,B2 & B8). This site links the Biggins Wood site to the rest of Shearway Business Park, but connectivity is limited because there is no direct access to the business park infrastructure.

(49) Park Farm Industrial Estate - Former Silver Spring site

- 4.76 This 3.8 hectare site in the heart of the Park Farm Industrial Estate in Folkestone is the former site of the Former Silver Spring bottling plant which closed in 2013. The former buildings have now been demolished and the site cleared.
- 4.77 This site offers the potential, alongside other sites, to address the shortage of good quality office space in Folkestone which has been identified as an issue in the recent Shepway Employment Land Review. However, there is recognition that this site could reflect the changing nature of the industrial estate which now has a large component of retail DIY and a large retail convenience store. Following close working with the owners of the site, the emerging Places and Policies Local Plan Preferred Options proposes mixed use development, including business (B1), leisure (D), selective retail (A1) and hotel (C1) uses for the site. Proposals are expected to come forward for this site via a planning application in the near future, with some infrastructure requirements alongside already identified in the emerging policy formation work undertaken.

(50) East Kent College Folkestone Campus Extension

- 4.78 New construction is proposed for the front of East Kent College's Folkestone campus to accommodate curriculum development for the Professional Services, Hospitality and Catering (including commercial restaurant) and Hair and Beauty (including commercial salon) and Early Years (provision of a nursery) sectors, a new reception, refectory and learning resource centre. The project would also create a new frontage to the campus and improved opportunities for students to train in commercially-orientated learning environments. The project would include a land disposal, encompassing a portion of land to the rear of the site and it is estimated will cost around £7.7 million.

(51) Princes Parade, Hythe

- 4.79 The Princes Parade site, located along Hythe Seafront and covering an area of 10ha, is a former waste disposal site that has lain dormant since the early 1970s. The site provides an opportunity to breathe new life into the area and deliver a number of key public benefits including :-
- A new leisure centre consisting of a 25m swimming pool, teaching pool, studio space and gym to replace the existing Hythe Swimming Pool which is obsolete.
 - New public open space to replace the existing underused space on the site and provide enhanced recreational opportunities at the seafront, including an 11m wide promenade and a substantial new public park to the western end of the site.
 - Up to 150 new homes, including 45 affordable units, to address social housing need within the District.
 - Small scale commercial uses including potentially shops/café/restaurant and a boutique hotel to expand the range of local services at the seafront and bring activity to the site.
 - The creation of a high quality tourist destination that will greatly boost Shepway and East Kent's tourism offer.

4.80 Shepway District Council, as the owner of the site, has recently submitted a planning application for the scheme and is in the process of preparing a business plan that will set out in detail how the scheme will be implemented. The Princes Parade development, being comprehensive in nature, provides an opportunity to deliver a range of regeneration and economic development objectives through the delivery of a scheme where the whole is greater than the sum of the parts.

(52) Romney Marsh Regeneration

4.81 Romney Marsh is faced with a significant economic challenge in light of the decommissioning of the Dungeness A nuclear power station which is due to enter the “Care and Maintenance” stage in 2025. EDF’s B station is also expected to cease generation in 2028, and while its decommissioning is actually likely to increase demand for employees for a while, cessation of energy production will eventually limit job opportunities for local people.

4.82 In response to this, partners, including Shepway District Council, Ashford Borough Council, Kent County Council, Magnox and the Nuclear Decommissioning Authority, are working through the Romney Marsh Partnership. This aims to deliver a mix of social, training and employment creation initiatives to help diversify the economy, which are identified in the Romney Marsh Delivery Plan.

4.83 There is strong evidence of local support for the nuclear industry in the Romney Marsh area which alongside close proximity to areas of high electricity demand and the presence of good infrastructure, provide strong arguments for the development of a Dungeness C nuclear power station. While at present the site is not on the Government’s list of preferred locations for new nuclear development, there is growing interest in the possibility of Small Modular Reactors (SMRs) which might be more easily accommodated at Dungeness. Other options, including the siting of a Geological Disposal Facility will also be explored.

(53) Mountfield Road Industrial Estate

4.84 Shepway District Council is finalising a Places and Policies Local Plan to identify further sites for development which will lead to the safeguarding of the Mountfield Road Industrial Estate for employment use. There is also potential for an adjacent site to be brought forward for development in the medium-term to long-term for housing which could deliver improved access to the estate as well as new community facilities.

4.85 Mountfield Road currently provides a business location for over 70 companies and organisations, with space for new ventures very rarely available. This is identified as a key employment site for further development in the Romney Marsh Delivery Plan. Initial capacity studies of the further 6.1ha available for development indicate it could provide up to 20,000 sq. m gross new business space, which could accommodate up to 700 jobs and approximately 40 businesses. There is also demand from existing occupiers of earlier phases for more grow-on space for expansion. The further development of Mountfield Road will make a significant contribution to facilitating the growth of business, job and skills opportunities on Romney Marsh.

- 4.86 Shepway District Council is funding, with a contribution from the Magnox Socio-economic Fund, the costs of taking forward development plans for the estate during 2017/18. This will include site master planning; a utilities & infrastructure report; and costings for the service road, development of plots and a business hub & skills centre.

(54) London Ashford Airport, Lydd

- 4.87 Following a Public Inquiry planning permissions have been secured for the extension of the runway and construction of a new terminal building at London Ashford Airport. The development will enable aircraft up to the size of Boeing 737s and Airbus 320s, capable of reaching most of Europe and North Africa, to be accommodated.



- 4.88 Total investment is expected to be £55 million with up to 200 jobs created and passenger numbers rising from an initial 30,000 pa to an eventual 500,000 pa.
- 4.89 The Airport is also now the permanent base for the UK Coastguard's Search and Rescue Helicopter Service in the south-east, which has involved £7 million of investment in the building of a new hangar for the service.

(55) Operation Stack Lorry Area

- 4.90 Over recent decades, the numbers of lorries crossing the English Channel has increased seven fold. Nearly 90% of all UK roll-on, roll-off, international freight goes through the Strait of Dover which puts 11,000 lorries per day on Kent's roads. When lorries are unable to use the Port of Dover and/ or Eurotunnel there are extensive queues of HGVs that have to be held on the M20 using the Operation Stack procedure. This causes considerable disruption to the national and local Kent economy, as well as considerable difficulties for local residents to go about their daily business. The problem was particularly acute in 2015 when Operation Stack was in place for 32 days.
- 4.91 Following a previous consultation on two possible sites in July 2016, the Secretary of State for Transport announced that a lorry area would be provided at Stanford West, located to the north and south of the M20 just west of junction 11 and close to the Stop24 Service Area. The plans for the proposed lorry area were the subject of a consultation in the summer of 2016. Space is proposed for around 3,600 HGV's, including 500 overnight parking spaces. The two parts of the site would be connected by a new bridge over the M20 with access directly to and from the M20. The proposals for the lorry area are currently the subject of a judicial challenge brought by a local land owner and supported by other parties. The judicial review is scheduled to be considered by the courts later in 2017 with legal submissions relating primarily to Environmental Assessment and consultation procedures carried out by Highways England. The programme for taking the project forward will depend on the outcome of the judicial review and the current Government's position.
- 4.92 The development of this lorry area may offer future employment growth opportunities for East Kent, associated with the development of freight clearance facilities and the resulting supply chains in view of Brexit.

(56) Otterpool Park/M20 Junction 11

- 4.93 In June 2016 Shepway District Council submitted an Expression of Interest for a new garden settlement of up to 12,000 new homes at Otterpool Park in response to the Department of Communities and Local Government's prospectus for "Locally Led Garden Villages, Towns and Cities". The expression of Interest led by Shepway District Council was supported by Kent County Council, Cozumel Estates (owners of Folkestone Racecourse) and Damian Collins M.P as well as a wide range of other key organisations and local businesses. The submission document stressed the unique opportunity presented by Otterpool Park to provide much needed new homes, employment and other facilities in a unique strategic location with a significant part of the area of search being in public ownership.
- 4.94 Gavin Barwell M.P, Minister for Housing and Planning, announced on the 11th November 2016, that Shepway's Expression of Interest had been successful. In making the announcement the Minister commented that the Government are getting behind plans for a new "Garden Town which offers a unique opportunity to boost the local economy, jobs and provide new homes in Shepway, Kent". The Minister confirmed that "Otterpool Park Garden Town will be supported with £750,000 of additional government capacity funding that will help kick-start work and enable the local council to take forward their proposal". SDC has subsequently been awarded a further £345,000 to support ongoing work to bring the site forward.
- 4.95 The Council is progressing two distinct works streams with regard to planning and delivering Otterpool Park. The first work stream involves the Council under its responsibility as the local planning authority, reviewing the Core Strategy Local Plan 2013 Its spatial growth study identifies this area for strategic growth, which will form the basis of an allocation for a new settlement. The second work stream involves other officers representing the council's land owning interests working closely with landowner partners Cozumel Estates in master planning the new settlement at Otterpool.
- 4.96 The intention is for a framework masterplan to be produced in the autumn 2017 with a planning application submitted during 2018. The planning application would be progressed in tandem with the planning policy work with a view to planning permission being secured in 2019 and the first development commencing on site in 2020.

(57) Westenhanger Rail Station Upgrade

- 4.97 A key component of the Transport and Movement Strategy for the Otterpool Park Garden Town will focus on the significant demand for rail access and the opportunity that Westenhanger Station can provide. By taking advantage of the connectivity to HS1 rail services offered by Westenhanger Station, Otterpool Park is ideally located to provide excellent access to the rail network and sustainable travel patterns, but requires substantial enhancement. One of the guiding principles for the new community is "promoting walking, cycling and sustainable transport".
- 4.98 An overarching key objective is to improve the East Kent HS1 service, and in particular for Shepway District to/from London St Pancras with the flexibility of introducing hourly connections to serve Otterpool Park Garden Town at Westenhanger Station. Accordingly, there will be a need for a study to define and appraise the benefits and disbenefits of providing a High Speed connection at Westenhanger, including the impacts on both Folkestone stations and at Sandwich and Dover.
- 4.99 The Shepway DC study team has engaged with relevant practitioners from Network Rail alongside other stakeholder partners (e.g. Kent County Council and Southeastern) in order to define the scale of enhancements required at Westenhanger Station. These will be captured and reflected within the Otterpool Site master plan and associated technical submissions. The next

step is to progress work on a Strategic Outline Business Case to develop the funding position for delivery of the Westenhanger Rail Station upgrade project.

- 4.100 The study team is separately aware that Network Rail (NR) is in the process of developing a Kent Route Study (KRS) for Network Rail’s Control Period 6 (CP6: 2019-2024) which will be subject to consultation in 2017. The final KRS will set out the Initial Industry Advice (IIA) which will set out the Statement of Funds Available (SOFA) to establish the High Level Output Specification (HLOS) from which the funding package for CP6 is finalised. Shepway District Council (SDC) is to make representations to both the KRS study and to the new South Eastern Rail Franchise consultations in due course.

Thanet

(58) Port of Ramsgate, Marina and Waterfront

- 4.101 The Port of Ramsgate is a vibrant Port with over £2 million investment in the refurbishment of Ro-Ro berths two and three, perimeter security improvements and maintenance dredging. The



Port currently has capacity for 500,000 units per annum which could be doubled and provides significant value to transport and logistics in East Kent. The project is currently at detailed design stage with the Council leading on delivery of the first phase. The first phase is the construction of a new double-deck ro-ro (roll on roll off) berth which will provide additional capacity for modern double deck loading and unloading which will increase resilience at the Port. This

initial phase will also include capital dredging of the 1 nautical mile long approach channel to the port entrance. This will widen the channel to provide the necessary clearance for larger vessels (up to 200m in length) to be accommodated at the port.

- 4.102 The second phase of the project involves seaward port expansion via land reclamation. The scheme will deliver at least 10 hectares of additional port side space and a long (250m) alongside quay facility allowing up to 2 freight vessels access at any one time.
- 4.103 The Royal Harbour in Ramsgate is edged by heritage assets, including a series of arches under the main road facing the harbour which are rented out and create a vibrant mixed use space with chandlers, bars, cafes and shops.

(59) Thanet Parkway Station

- 4.104 The proposed Thanet Parkway passenger railway station is located on the Ashford International to Ramsgate line, south of the Manston Airport site and just to the west of the village of Cliffsend. It will be located between the existing Ramsgate and Minster stations on the Kent Main Line. The station will be served by the high speed domestic services which run from Margate to St Pancras via Ashford International and mainline services from Ramsgate to Charing Cross.
- 4.105 With connections to HS1, in combination with the Journey Time Improvement (JTI) project, the new station will reduce travel times from Thanet to central London to about one hour. This will

help improve investors' perception that East Kent is easily accessible and an attractive place to invest in and do business. Reduced journey times to London will support the Council's (and partners) requirement to increase inward investment in the area. The



public sector owns employment land that was purchased to enable development and the Parkway will assist its success in providing employment opportunities.

- 4.106 The total capital cost of the scheme including the station is estimated to be approximately £21.2 million at current prices. Funding has been secured from the Local Growth Fund and an application is in to the New Stations Fund Two for £8.8 million. Commencement is due on site in May 2019 with completion in 2020.
- 4.107 Improving connectivity is a vital step in unlocking growth potential and attracting the necessary investment and job opportunities for local people. In particular, the Parkway supports Thanet's Local Plan delivery targets of creating 17,140 house and 5,000 job in the district by 2031. The station will support potential new development at the Discovery Park Enterprise Zone, Manston Park and EuroKent Business Park (which are all within three miles of the proposed station location) and Westwood Cross Retail and Shopping Centre. It will also provide significantly improved access to the former Manston Airport site and additional car park capacity for park & ride to supplement existing provision at Ramsgate station.

(60) Inner Circuit Improvement Strategy

- 4.108 The inner route improvement strategy encompasses an integrated package of new and upgraded highways to provide additional highway capacity and network resilience within Thanet. This will provide a highway network that is fit for purpose to accommodate traffic generated by proposed future housing and employment growth within the district.
- 4.109 Thanet's principal road network is currently subject to significant traffic delay and congestion within times of peak demand. The Inner Route Improvement Strategy provides access to alternative routes when travelling between towns and settlements, freeing up existing road capacity and making better use of existing infrastructure provision. It also provides enhanced opportunities for improved public transport access, including existing rural settlements. The routes will provide direct access to the A28, A256 & A299 corridors. They will also provide improved access to Westwood, the district's commercial and retail hub, without traversing built up areas or causing congestion on the network.
- 4.110 The route strategy is therefore essential to support future growth and investment in the district. Directly the different sections of road will deliver 6,650 dwellings. However, the improved network is required to support the delivery of the total 17,140 dwellings identified in the Local Plan, ensuring that the district is able to facilitate this growth in a positive way.

(61) Westwood Relief Strategy

- 4.111 The Westwood Relief Strategy, which is part of the Inner Circuit Improvement Strategy, will combine the creation of a circular route around the core area of Westwood, with improvements to the central roundabout, promoting increased pedestrian, cycle and public transport permeability. This will facilitate improved accessibility at peak times to reduce congestion and

will also unlock the ability to redesign Westwood as a more integrated town centre with an improved relationship between existing retail land uses.

- 4.112 The proposed scheme will upgrade, realign and reconstruct an existing private access road which connects the major road networks of the A254 & A256. This will subsequently enable it to be used as a strategic distributor route, in turn realising a comprehensive relief route for the Westwood roundabout. The new link road will form part of the principal road network and therefore become a publically maintainable highway.
- 4.113 This scheme will offer enhanced public transport opportunities, with direct bus access to retail frontages and enhanced footway/cycleway facilities which will encourage a shift to more sustainable modes of transport.
- 4.114 The Westwood Relief Strategy is currently partially implemented following a successful 'Pinch Point' funding bid and development negotiations. The proposed scheme represents the final and most critical element of the new alternative orbital route, which in turn enables the full benefits of previous investment to be realised. It will complete the opportunity for road users to travel around the Westwood area and not be directed to converge with other major routes into the middle at Westwood Roundabout. It will provide a much more flexible and resilient highway network for all road users.

(63) Advanced Manufacturing Park (Manston Business Park)

- 4.115 Through the council's Economic Growth Strategy the delivery of an Advanced Manufacturing Park (AMP) has been identified as a transformational initiative that will provide the space and impetus for funding to drive growth within the sector.
- 4.116 Thanet has the availability of employment land that can fulfil such a cluster. Advanced Manufacturing businesses already exist in the district; some of these are multinationals including Cummins and Fujifilm who play a key role in this sector by investing in people and sharing best practice.
- 4.117 Thanet is fortunate to be closely located to Discovery Park which includes a large number of R&D companies who potentially require further space, and/or requirements for manufacturing linked to businesses on the site. Discovery Park has shown support for such a development in Manston.
- 4.118 A dedicated park will provide space to bring together the businesses that already exist in the district, whilst providing opportunities for move on space. It is well documented that clustering businesses together provides a number of opportunities including growth in that sector. A dedicated park would support the churn of start-up businesses by providing space for growing businesses to move in to, thus releasing sort after smaller start-up units. The Park will also create spin-off businesses, as seen at Discovery Park.

(64) Creative Industries Workspace

- 4.119 The council commissioned a report into the creative sector to better understand the growth opportunities of the businesses already in the district and to identify how they have grown over time. Over the four year period to 2016 the creative industries grew by a significant 84% in Thanet.
- 4.120 There are a number of workspaces available across the district. However, the sustainability of these is not guaranteed and the council does not own or have any direct influence on this. A programme of activity is required to support the development of studios, makers spaces and workshops to support this growing sector. A previous grants programme supported the growth of a number of businesses in the district taking them from start-ups to successful businesses.

This form of support enables start-up organisations to take the risk required to ensure their growth alongside a programme of business support.

(65) Feasibility modelling for Ramsgate, Margate and Viking Bay

- 4.121 Ramsgate has previously received regeneration funding for public realm and mixed use development with a focus on improving the residential areas of the town centre. The town is coming towards an exciting time and a masterplan is a priority to draw together all of the opportunities facing the town.
- 4.122 Funding applications are into various bodies for a number of projects including for public realm, business support, engaging with young people, the creative environment and supporting the growth of the Port of Ramsgate. Joining these up to help inform planning and investment decisions will enable the town to take advantage of the opportunities available.
- 4.123 The aspiration is to develop a plan that includes business cases for some key sites and assets that are around Ramsgate town which could truly make a significant difference to the economy and will encourage stalled private sector investments to continue. The plan will also be important to create a balanced mixed economy supporting its businesses, visitors and residents. Funding will help develop the plan and business cases in order to direct other external funding to enable delivery that will be truly place shaping, and which has been identified in Ramsgate Coastal Community Team's Economic Plan.
- 4.124 Developing a masterplan for Margate is a priority because it brings together 15 years of focus on delivering regeneration in the town at a time when values are improving and economic growth in the town is evident. Nationally town centres are still feeling the pressure from changes in the way that we shop and the fact that brands have left many small town centres. Margate still feels this pressure in the larger units across the town, but the smaller units are being filled by independents and are very much in demand.
- 4.125 The Margate Housing Intervention Programme was established in 2012. It set out to transform the housing market in two of Britain's most deprived wards; Cliftonville West and Margate Central. 'Live Margate' is a 10-15 year innovative programme that has seen Thanet District Council (TDC), Kent County Council (KCC) and the Homes and Communities Agency (HCA) work together to deliver housing improvements, on a street by street basis, with the aim of enabling a step change in the housing market, improving the transient nature of the areas and creating a more sustainable community. The programme estimated that over its lifetime 300 homes would need to be acquired, improved and occupied with a new form of tenure if the aims of the programme are to be achieved.
- 4.126 £666,000 from the Local Growth Fund has been awarded to deliver projects in two streets in the Cliftonville West area alongside the great delivery that has taken place since 2012 which is making a real difference to the area and its housing. Margate has been quoted as having seen an average house price increase of 12.5% between 2015 and 2016.



4.127 The Old Town in Margate and the public realm improvements to the Revetments steps have been a catalyst for significant economic growth in the creative sector demonstrated by an 84% growth in Creative businesses.

(66) Ramsgate Heritage Action Zone

4.128 Ramsgate has been awarded Heritage Action Zone status by Historic England which brings a concerted effort by Historic England, the council and the Ramsgate Coastal Community Team to improve the historic environment and bring forward projects that support the town’s economic growth whilst sustaining the built environment.



4.129 Match funding has come from the public sector in order to support this, including the requirement of a Heritage Action Zone Programme Manager to lead project engagement and delivery.

4.130 The council, with the HCA which has ownership of a large unit in Margate the town centre, own a number of leisure buildings in the town including the Winter Gardens, Dreamland and the Theatre Royal. Other valued assets are in private ownership, including the Lido. The Turner Contemporary has seen huge numbers of visitors and has plans for growth and the wider creative sector is starting to take hold and grow in the town. It is at this point that a masterplan is required to help draw to together the successes and ensure the town is prepared and has the right assets (with the right zoning) to take forward the next phase of growth to ‘ride the crest of the wave’.

4.131 Decisions need to be informed, whether they are planning decisions or investment decisions, to ensure that the town is fit for purpose for its businesses, residents and visitors. Funding is required for initial master planning with some match funding from the council and for initial business case development to help bring forward sites that are in public sector ownership to enable the council to deliver its place leadership and shaping role. This is also identified as a priority in the Margate Coastal Community Team's Economic Plan

(68) Dreamland and Sunshine Cafe Redevelopment

4.132 Following the successful investment in the Dreamland amusement park site, Thanet District Council has accessed funding and invested in developing out the Dreamland cinema complex on Margate sea front. Phase 1 includes the redevelopment and refurbishment of the Sunshine Café including restoring its heritage assets. The aim has been to prepare it for the market place to bring in an external private operator. Phase 2 is the further development of the Cinema Complex which could produce a further 200 jobs and multi-functional entertainment space with provision for some office units.



(69) Viking Bay

- 4.133 The jewel in the crown in terms of Thanet's beaches, which attract residents and visitors alike, is Viking Bay which has a place shaping role in terms of the wider Broadstairs town. The Broadstairs Coastal Community Team has identified improving Viking Bay through the development of a masterplan as a priority in their Economic Plan.
- 4.134 The council is in ownership of a significant land parcel at the back of the bay which currently includes beach huts, vacant toilets and lift short and concessions. This creates a poor image of the public realm due to its poor state of repair and does not fit with the image of the rest of the town.
- 4.135 The vision is for a comprehensive redevelopment of the back of the bay which will take into account leisure and tourism uses and makes better use of the space, working with the private sector. Funding is required for the initial masterplan and to take the site to the market to take forward the development.

(70) EuroKent Business Park

- 4.136 A joint venture between Thanet District Council and Kent County Council, East Kent Opportunities is bringing forward the commercial development at EuroKent with a view to providing office accommodation on site adjacent to the residential development. This supports the existing EuroKent Business Park, a Thanet District Council and SEEDA development, where the office and industrial space is currently full. This model is one that could be replicated in East Kent to support the provision of commercial units.

(71) Agri-Tech Hub

- 4.137 Thanet is home to the UK's leading agri-tech business Thanet Earth. Here technology meets 20% extra daylight to produce tones of cucumbers, peppers and tomatoes in six enormous greenhouses in the middle of the district. The council is working with Thanet Earth and Canterbury Christ Church University to identify opportunities for developing an Agri-tech hub and centre of excellence in the district to support research and business development.



(72) East Kent College Broadstairs Campus extension

- 4.138 There are plans to refurbish the Inspire Building at East Kent College's Broadstairs campus to create modern Hospitality and Catering sector training provision in order to ensure that the skills training provided by the college is relevant for the growing modern tourist sector across East Kent. The estimated of this project is £2.1 million.

(73) East Kent Increased Rail Capacity and Journey Time Improvements

- 4.139 Phase 1 of the project (Ashford – Canterbury West) to improve rail capacity and journey times in East Kent is nearing completion. Extensive works have been undertaken to the track to increase the speed limit on this section and there remains a final piece of work to deliver. The expected journey time saving from this phase will be two minutes, which is planned for delivery in the May 2018 timetable.
- 4.140 Phase 2 of the project (Canterbury West – Ramsgate) is at an earlier stage of development with Network Rail, working in partnership with Kent County Council to deliver the project, undertaking option selection for this section of the route. Works are expected to be undertaken

during 2018 and 2019, with a further one minute journey time saving expected to be gained in the May 2020 timetable.

- 4.141 Taken together with the two minutes savings already delivered in the January 2015 timetable with the removal of joining and dividing of High Speed trains at Ashford, the saving from the journey time improvement (JTI) project is expected to total five minutes. This will support the planned opening of the new Thanet Parkway station in 2020, with the additional journey time incurred at Ramsgate offset by the JTI project. The best journey times will be from the new station, with an anticipated running time of about 62 minutes to London Stratford and about 69 minutes to London St Pancras.
- 4.142 East Kent needs to see an increase in the capacity and frequency of services from the area, both on the high speed line and on the mainline services especially in peak periods. The new South Eastern Franchise and new South East Route: Kent Area Route Study will need to deliver additional rolling stock to facilitate this requirement for increased rail capacity, especially with the high projected demand through the growth of the area over the next 10 years
- 4.143 The March 2017 “South East Route: Kent Area Route Study, Draft for Consultation” sets out the key requirements to upgrade the Marshlink line between Ashford International and Hastings to enable High Speed services from Hastings to St Pancras via Ashford International. Electrification and journey time improvements, as well as development of a new connection at Ashford International onto HS1 and additional rolling stock, are required to deliver these new improvements to better connect East Kent to Sussex and London.

(74) Kent & Medway Business Fund/Expansion East Kent

- 4.144 The Expansion East Kent Programme was launched in December 2012 following an allocation of £35 million from the central Government Regional Growth Fund to offer financial assistance (loans, grants or equity) to local businesses in East Kent. As at 31 December 2016 Kent County Council, as the accountable body for the funds, have committed 160 investments totalling £36.2 million to 153 companies within the local authority areas of Ashford, Canterbury, Dover, Shepway and Thanet.
- 4.145 There were two funding schemes open to business in the area - the Expansion East Kent programme and the Small Business Boost programme, both of which are now closed. The programmes have created 1,459 job opportunities and safeguarded 967 jobs that without the funding awarded to the companies would have ceased.
- 4.146 The companies receiving the loans have now made repayments of over £5 million which will be recycled to other businesses in the East Kent area via the new ‘Kent and Medway Business Fund’.

(75) Delivering Better Broadband

- 4.147 Kent County Council is working with the Government’s broadband agency, Broadband Delivery UK (BDUK) to improve access to superfast broadband services. To date this work has already brought superfast broadband to over 125,000 homes and businesses, which would otherwise have been left with no or slow broadband speeds. This means that over 92% of properties across Kent and Medway can now access a superfast broadband service of at least 24mbps. In all districts except Ashford across East Kent, a higher percentage of properties have access to superfast broadband than the Kent average. According to the Think Broadband website, Thanet has the highest percentage at 97.6%, followed by Canterbury (94.7%), Shepway (92.9%), Dover (91.2%) and Ashford (86%).

4.148 The County Council is now working with BDUK on further projects to extend the reach of superfast broadband. This is part of the Government’s national broadband programme to ensure that at least 95% of properties across the UK can access superfast broadband by the end of the 2017. In Kent, the aim is to achieve 95% coverage by the end of 2017 and 95.7% coverage by September 2018.

4.149 The Government has also developed a ‘better broadband’ scheme for homes and businesses that are not able to get a broadband service of at least 2mbps. This national scheme offers a subsidy towards the equipment and installation costs of a satellite or fixed wireless broadband connection and Kent County Council is administering the scheme.

4.150 East Kent should drive for 1G broadband working with broad band providers to support East Kent to have another unique selling point.

Scale of Opportunity

4.151 The potential impact on the East Kent economy if all of the listed projects are delivered is significant. Based on information (where known), in combined terms the projects represent the potential to generate or unlock:

- About 47,000 direct and indirect jobs, equivalent to 16% of the total number of jobs in East Kent in 2016.
- Capacity for over 86,000 dwellings.

4.152 The economic potential of the strategic and local projects is set out in Table 4.4 below.

Table 4.4 Estimated Economic Outputs from Projects

Type	Employment *	Dwellings
Strategically-significant	36,300	73,800
Locally-significant	11,100	12,500
Total	47,400	86,300

Source: East Kent local authorities Note: totals rounded * direct and indirect jobs excluding construction

This demonstrates the extent of the opportunity. Members of EKRB are pleased to present and to have further discussions on the necessary investments required to enable the significance of growth to be realised.

Appendix 1: Stakeholder Consultees

The following individuals have contributed to the development of the Framework through attendance at officer group meetings, workshops or through individual discussions.

Louise Askew, Thanet District Council

Carole Barron, University of Kent

Ian Brown, Canterbury City Council

Rebecca Burden, Dover District Council

Nick Churchill, Canterbury City Council

Andrew Coleman, Local Partnerships

Simon Coles, Ashford Borough Council

Richard Hall, Canterbury City Council

Dave Hughes, Kent County Council

Liz Harrison, Kent County Council

Katharine Harvey, Shepway District Council

Susan Priest, Shepway District Council

Tim Ingleton, Dover District Council

Helen James, Canterbury Christ Church University

Kent Invicta Chamber of Commerce – Ashford Economic Development Group

Kent Invicta Chamber of Commerce – Canterbury Economic Development Group

Kent Invicta Chamber of Commerce – East Kent Economic Development Group

Graham Razey, East Kent College/Canterbury College

Paul Sayers, East Kent College/Canterbury College

Mark Lumsden-Taylor, Hadlow College

Geoff Miles, Kent and Medway Economic Partnership

Sarah Nurden, KMEP

Andrew Osborne, Ashford Borough Council

Susan Priest, Shepway District Council

Jim Scopes, Local Partnerships

Debbie Spalding, East Kent Spatial Development Company

Adrian Verrall, Thanet District Council

Jacqui Ward, Kent County Council

Paul Wookey, Locate in Kent

Appendix 2: Project Schedule

Local Authority	Project Name	Scheme Type	Employment Outputs (if known)*	Housing Outputs (if known)	Significance	Alignment with Framework Objective(s)			
						1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Skills and Productivity within Business	4. Place Making and Shaping
Ashford	1 Ashford Town Centre Transformation Project	Infrastructure	Unlocking 1,000	Unlocking 1129	Strategic	✓			✓
	2 Ashford Commercial Quarter	Mixed	2,800	150	Strategic		✓	✓	✓
	3 Ashford College Campus	Mixed	150	240	Strategic	✓	✓	✓	✓
	4 Elwick Place	Mixed	600	150	Local			✓	✓
	5 Southern Expansion Quarter / Victoria Way	Mixed	c500	c1,100	Local	✓	✓	✓	✓
	6 Jasmin Vardimon	Commercial	Unknown	0	Local		✓	✓	✓
	7 Ashford Designer Outlet Expansion	Commercial	Up to700	0	Strategic		✓	✓	✓
	8 Chilmington Green	Mixed	1,000	5,750	Strategic	✓	✓	✓	✓
	9 M20 Junction 10A	Infrastructure	Unlocking 5,000	Unlocking 7,000	Strategic	✓		✓	
	10 Ashford International Station	Infrastructure	1,000	350	Strategic	✓		✓	
	11 Newtown Works	Mixed	500	c450	Local	✓	✓	✓	✓
	12 Conningbrook housing and water park	Mixed	100	c550	Strategic	✓			✓

Local Authority	Project Name	Scheme Type	Employment Outputs (if known)*	Housing Outputs (if known)	Significance	Alignment with Framework Objective(s)				
						1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Skills and Productivity within Business	4. Place Making and Shaping	
Canterbury	13	Canterbury Knowledge City:	Mixed	650+ direct	0	Strategic	✓	✓	✓	✓
	14	Kent Medical School & Research Complex	Commercial	100+ (direct)	0	Strategic		✓	✓	
	15	Canterbury Innovation Centre II	Commercial	225 (direct)	0	Local		✓	✓	
	16	"Makers Space" and "Hot House"	Commercial	50 / year (direct)	0	Local		✓	✓	
	17	Canterbury Christ Church University EDGE Project	Mixed	70 (direct)	0	Strategic		✓	✓	
	18	Herne Bay Business Centre	Commercial	200 (direct)	0	Local		✓	✓	
	19	A28 Corridor:	Infrastructure	Unlocking 6000+	Unlocking 9,600+	Strategic	✓		✓	
	20	Milton Manor Roundabout	Infrastructure	Unknown	Unknown	Local	✓		✓	
	21	A2 slip at Bridge	Infrastructure	3000 (unlocked)	4000	Local	✓		✓	
	22	A2 offslip and park & ride relocation	Infrastructure	1685 (unlocked)	1150	Local	✓		✓	
	23	Wincheap Traffic Management Scheme	Infrastructure	600 (unlocked)	0	Local	✓		✓	✓
	24	Sturry Link Road	Infrastructure	1800 (unlocked)	4500	Strategic	✓		✓	
	25	Sturry Rd Integrated Transport Package	Infrastructure	1800 (unlocked)	4500	Local	✓		✓	
	26	Canterbury Eastern Bypass	Infrastructure	Unknown	0	Strategic	✓		✓	
	27	Canterbury Western Link Road	Infrastructure	Unknown	0	Strategic	✓		✓	
	28	Herne Bay Marina	Mixed	Unknown	0	Local	✓		✓	✓
29	Whitstable Park & Ride	Infrastructure	Unknown	0	Local	✓			✓	

Local Authority	Project Name	Scheme Type	Employment Outputs (if known)*	Housing Outputs (if known)	Significance	Alignment with Framework Objective(s)			
						1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Skills and Productivity within Business	4. Place Making and Shaping
Dover	30 Whitfield:	Mixed	480	5,750	Strategic	✓	✓	✓	✓
	31 Sewerage and Water Infrastructure	Infrastructure	Unknown	Unknown	Local	✓		✓	
	32 Bus Rapid Transit Scheme	Infrastructure	Unknown	Unknown	Local	✓		✓	
	33 White Cliffs Business Park (Phase 3)	Mixed	Unknown	Unknown	Strategic		✓	✓	✓
	34 Dover Town Centre Public Realm Improvements	Mixed	Unknown	Unknown	Local			✓	✓
	35 Dover Waterfront	Mixed	1,930	Unknown	Local			✓	✓
	36 Fomer Connaught Barracks	Mixed	Unknown	500	Local		✓	✓	✓
	37 Discovery Park, Sandwich	Mixed	Unknown	500	Strategic		✓	✓	✓
	38 Duke of York Roundabout Improvements	Infrastructure	Unknown	Unknown	Strategic	✓		✓	
	39 A2 Improvements – duelling between Lydden and Dover Town	Infrastructure	Unknown	Unknown	Strategic	✓		✓	✓
	40 Dualling of the Remainder of the A256	Infrastructure	Unknown	Unknown	Strategic	✓	✓	✓	✓
	41 Betteshanger Sustainable Park	Mixed	1000	Unknown	Local		✓	✓	✓
42 Open Golf at Sandwich	Infrastructure	Unknown	Unknown	Strategic	✓				

Local Authority	Project Name	Scheme Type	Employment Outputs (if known)*	Housing Outputs (if known)	Significance	Alignment with Framework Objective(s)			
						1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Skills and Productivity within Business	4. Place Making and Shaping
Shepway	43 Folkestone Seafront & Town Centre:	Mixed			Strategic	✓	✓	✓	✓
	44 Folkestone Harbour and Seafront	Mixed	500	1,000	Strategic		✓	✓	✓
	45 Folkestone Creative Quarter	Commercial	300	0	Strategic		✓	✓	✓
	46 Folkestone Townscape Heritage Initiative	Mixed	0	0	Local			✓	✓
	47 Former Gasworks, Ship Street	Mixed	0	85	Local	✓			✓
	48 Shearway Business Park - Biggins Wood/Caesars Way	Mixed	Unknown	77	Local	✓	✓		
	49 Park Farm Industrial Estate - Silver Springs site	Commercial	Unknown	0	Local	✓	✓		
	50 East Kent College Folkestone Campus Extension	Mixed	Unknown	Unknown	Local		✓	✓	
	51 Princes Parade, Hythe	Mixed	Unknown	150	Local		✓		✓
	52 Romney Marsh Regeneration:	Mixed	Unknown	Unknown	Strategic	✓	✓	✓	
	53 Mountfield Road Industrial Estate/South New Romney	Mixed	700	400	Local	✓	✓	✓	
	54 London Ashford Airport	Mixed	1,680	0	Strategic	✓	✓	✓	
	55 Operation Stack Lorry Area	Infrastructure	Unknown	Unknown	Strategic	✓		✓	
	56 M20 Junction 11 / Otterpool Park	Mixed	500	Up to 12,000	Strategic	✓	✓		✓
	57 Westenhanger Rail Station upgrade	Infrastructure	Unknown	Unknown	Strategic	✓		✓	

Local Authority	Project Name	Scheme Type	Employment Outputs (if known)*	Housing Outputs (if known)	Significance	Alignment with Framework Objective(s)				
						1. Unlocking Growth through Infrastructure	2. Delivery of Business Space	3. Supporting Skills and Productivity within Business	4. Place Making and Shaping	
Thanet	58	Port of Ramsgate	Infrastructure	580	0	Strategic	✓	✓	✓	✓
	59	Thanet Parkway Station	Infrastructure	Unlocking 5,000	Unlocking 12,000	Strategic	✓		✓	✓
	60	Inner Route Improvement Strategy	Infrastructure	Unlocking 5,000	unlocking 13,300	Strategic	✓		✓	✓
	61	Westwood relief strategy	Infrastructure	Unknown	Unknown	Local	✓		✓	✓
	62	Margate Junction improvements	Infrastructure	Unknown	Unknown	Local	✓		✓	✓
	63	Advanced Manufacturing Park (Manston Business Park)	Commercial	Unknown	Unknown	Strategic		✓	✓	
	64	Creative Industries Workspace	Commercial	Unknown	Unknown	Strategic		✓	✓	✓
	65	Feasibility Modelling for Ramsgate, Margate and Viking Bay	Commercial	Unknown	Unknown	Local	✓	✓	✓	✓
	66	Ramsgate Heritage Action Zone	Commercial	Unknown	Unknown	Local				✓
	67	Theatre Royal	Commercial	Unknown	Unknown	Local				✓
	68	Dreamland and Sunshine Café Redevelopment	Commercial	200	Unknown	Local				✓
	69	Viking Bay	Commercial	Unknown	Unknown	Local				✓
	70	EuroKent Business Park	Mixed	Unknown	Unknown	Strategic		✓		
	71	Agri-tech Hub	Commercial	Unknown	Unknown	Local			✓	
	72	East Kent Broadstairs Campus Refurbishment	Mixed	Unknown	Unknown	Local			✓	

East Kent Growth Framework Evidence Report

East Kent Regeneration Board

May 2017

LICHFIELDS

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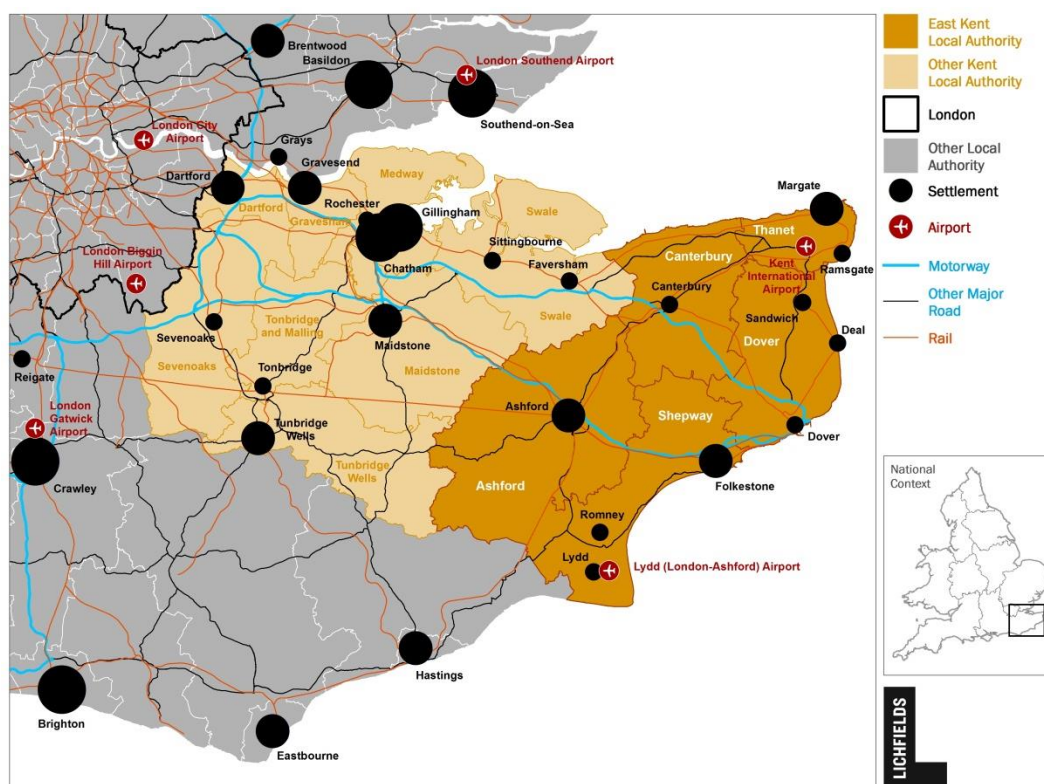
1.0 Introduction

- 1.1 The East Kent Regeneration Board (‘EKRB’), comprising of Ashford Borough Council, Canterbury City Council, Dover District Council, Shepway District Council Thanet District Council and Kent County Council, commissioned Lichfields to provide analytical support for the development a new East Kent Growth Framework (‘EKGF’, ‘the Framework’).
- 1.2 The aim of the Framework is to set out the collective economic growth ambitions for East Kent and provide a strategic framework for investments and economic growth initiatives. It will support the EKRB to adopt a cohesive and consistent approach towards investment opportunities as future funding opportunities arise.

Background and Purpose

- 1.3 East Kent includes the five local authority areas of Ashford, Canterbury, Dover, Shepway and Thanet as shown in Figure 1.1. Throughout this report, ‘East Kent’ is used to refer collectively to these five local authority districts, which together form the area covered by the East Kent Regeneration Board.

Figure 1.1 Spatial Context of East Kent



Source: Lichfields

- 1.4 The EKRB comprises the five East Kent local authorities and Kent County Council. Board representatives include the Leaders and Chief Executive from each of the five East Kent Districts, together with the Kent County Council’s Cabinet Member for Economic Development and Corporate Director of Growth, Transport and Environment.
- 1.5 The EKRB agrees the investment and growth priorities in East Kent and identifies and takes forward collaborative working to achieve the common goal of achieving economic growth across East Kent.

East Kent Growth Plan (2013)

- 1.6 The previous East Kent Growth Plan, ‘Open for Growth’, was published in 2013 by the EKRB and set out the area’s collective opportunities for growth, its investment priorities and the actions that need to be taken to drive them forward. It provided a new joint economic strategy to allow the five East Kent districts to work together to unlock East Kent’s key opportunities for new homes, new jobs and new business investment. It was accompanied by the East Kent Economic Review; a background document which informed the development of the Growth Plan by setting out a profile of the area.
- 1.7 In the intervening period since 2013, East Kent’s economy has undergone a number of changes and this new Framework is intended to provide an update of the earlier plan. Against the backdrop of an increasingly competitive environment for investment, the EKRB recognises that it is now more important than ever to understand and articulate what East Kent’s offer is going forward and how investment in East Kent will deliver growth for the local, sub-regional and regional economy. Crucially, it will identify and prioritise a series of key regeneration projects and schemes that have the potential to drive this growth if investment can be secured to kick-start their delivery.

Methodology

- 1.8 This evidence report provides an analysis of existing evidence and data sources in order to establish the economic strengths, weaknesses, opportunities and threats faced by East Kent collectively and the five authorities individually. This analysis has been undertaken across three key themes or topic areas, namely ‘economy’, ‘people’ and ‘place’, as summarised in this evidence report.
- 1.9 The analysis draws upon existing evidence prepared at local authority, county and Local Enterprise Partnership scales supplemented by latest national datasets where available. The focus is on assimilating and synthesising existing information and intelligence to complement existing strategies and agreed approaches. It should be noted that this is not necessarily an exhaustive literature review but is based on a filtering of the existing evidence of most relevance to the analysis at the strategic level. Where possible, the report highlights key indicators for East Kent as a whole and for the component districts, although this is not possible in all cases.
- 1.10 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the point of preparation in late 2016. The accuracy of data derived from third party sources has not been checked or verified by Lichfields.

Structure of the Report

- 1.11 The remainder of this document is structured as follows:
- Section 2.0 examines the economic fabric of the area with reference to economic growth and sectors.
 - Section 3.0 explores the area’s population and labour force profile.
 - Section 4.0 considers a range of place based factors in East Kent, in terms of recent patterns of development, market trends and growth capacity issues.
 - Section 5.0 brings together the thematic evidence to identify East Kent’s overarching strengths, weaknesses, opportunities and threats.

2.0 Economy

2.1 In order to understand the growth potential of East Kent's economy, this section considers the scale of the area's economy against comparator areas, recent and forecast trends in employment growth, and the degree of sector specialisation and growth potential that exists.

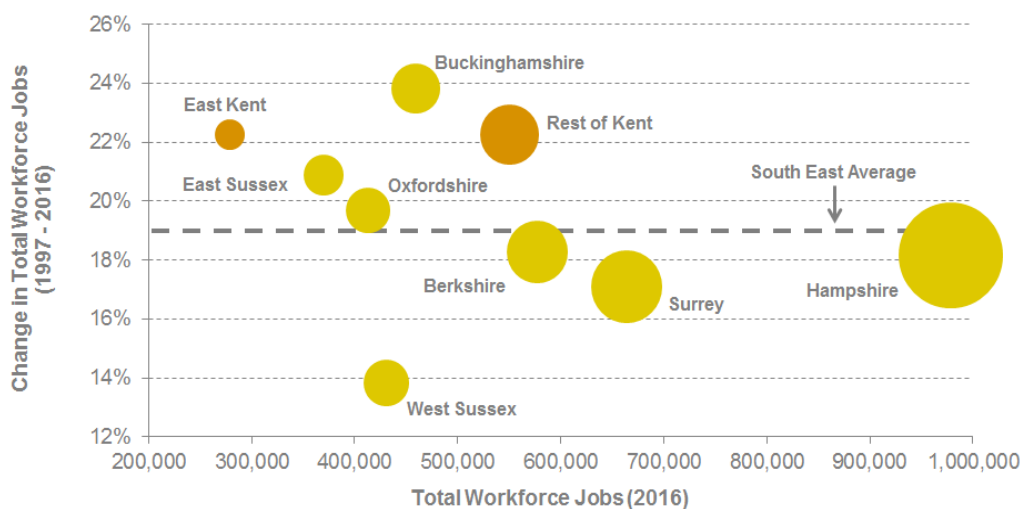
2.2 The following analysis is structured around four broad questions:

- How big is the economy?
- How is the structure of the economy changing?
- How are identified growth sectors performing?
- What is the future potential of East Kent?

Employment Trends

2.3 In 2016, the East Kent economy supported a total of 278,600 workforce jobs, equivalent to around a third (34%) of all workforce jobs in Kent. As a whole, Kent represents the second largest of the South East counties in employment terms (as at 2016) and has also recorded strong job growth over recent years (since 1997), falling behind only Buckinghamshire (Figure 2.1).

Figure 2.1 Employment Change by Counties of the South East, 1997-2016

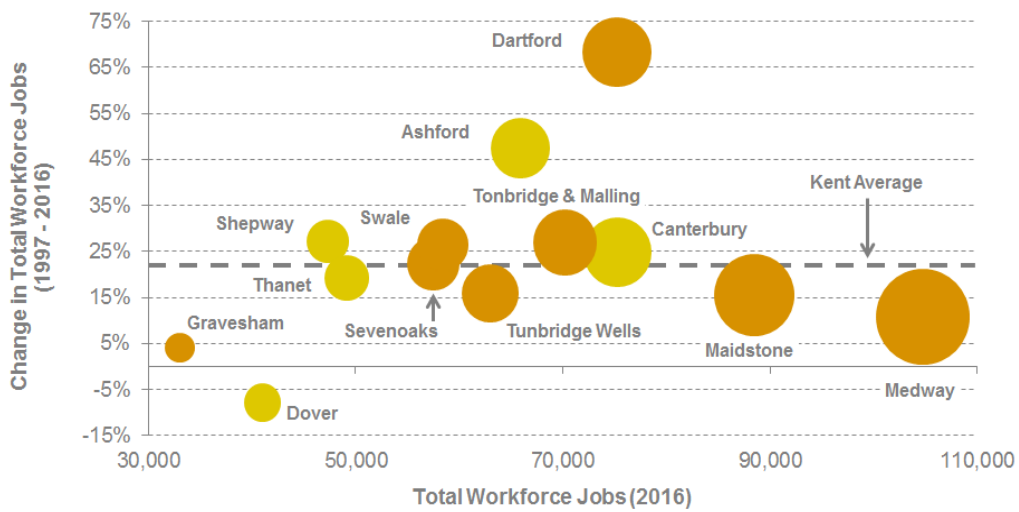


Source: Experian (September 2016) / Lichfields analysis

2.4 Considered as a single entity, East Kent has generated strong employment growth rates during recent years, with total workforce jobs growing by just over 22% between 1997 and 2016, matching the scale of growth recorded in the rest of Kent over this period (Figure 2.1).

2.5 This overall trend masks significant variations at a more local level, within the East Kent sub-region. Figure 2.2 shows that over the 19 years to 2016, Ashford stands out as recording the most significant workforce job growth (at 47%), followed by Shepway (27%), Canterbury (25%) and Thanet (19%). The only authority area in East Kent to have recorded a decline in its employment base over this time period is Dover, where the stock of workforce jobs declined by around 3,500 or 8% (Figure 2.2).

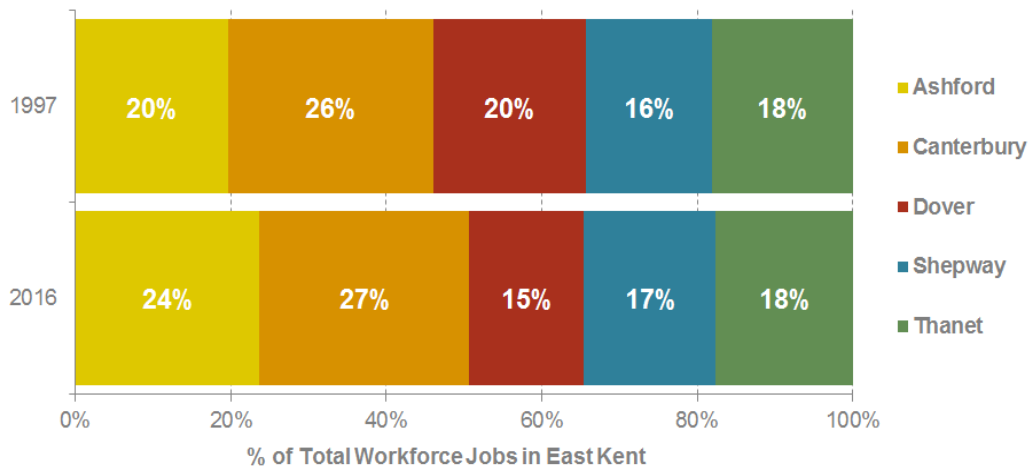
Figure 2.2 Employment Change by Kent Local Authority



Source: Experian (September 2016) / Lichfields analysis

2.6 In absolute employment terms, Canterbury represents East Kent’s largest economy, and accommodates just over a quarter (27%) of the sub-region’s employment base. As shown in Figure 2.3, the share of East Kent’s employment is relatively uneven across individual local authority areas, with the two authorities of Ashford and Canterbury supporting more than half of all jobs in East Kent in 2016. By comparison, Dover’s share of total employment stands at 15% and this relative contribution has declined over the past 19 years.

Figure 2.3 Share of Total Workforce Jobs by East Kent Local Authority



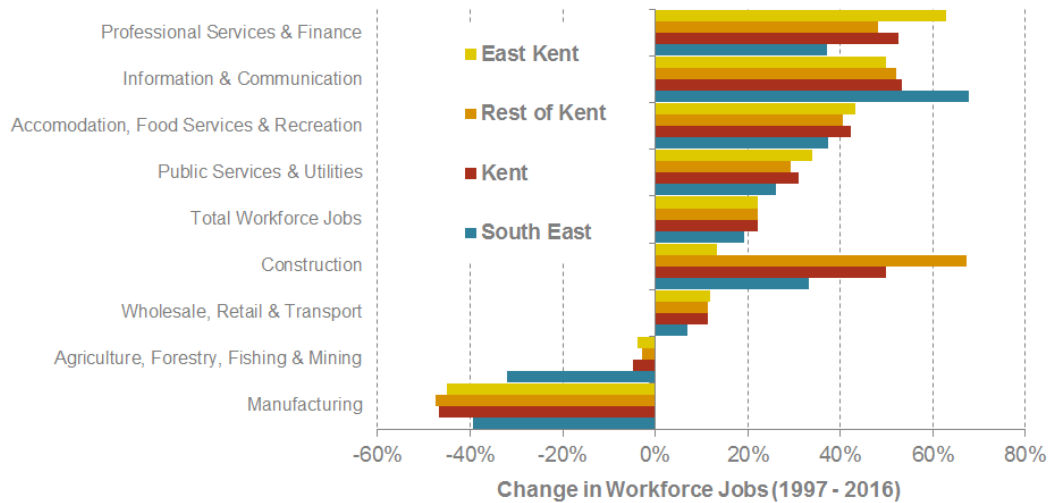
Source: Experian (September 2016) / Lichfields analysis

2.7 These trends should be considered within the context of significant economic change, challenges and re-structuring within East Kent and the surrounding area over recent decades, including the closure of East Kent’s coalfields in the 1980s, the opening of the Channel Tunnel in 1994 and the announcement by Pfizer in 2011 that it intended to withdraw from Sandwich as part of a global restructure. This was followed shortly by Discovery Park’s designation as an Enterprise Zone which is now one of the largest business parks in Europe with a specialist focus on science and technology.

Sector Composition and Specialisation

2.8 East Kent supports a diverse business base across a wide range of sector activities, with strong prospects to generate high levels of growth in the future. Recent job growth across the sub-region has been relatively strong in several high value office based sectors such as professional services, finance and ICT (Figure 2.4), particularly when compared with other parts of Kent.

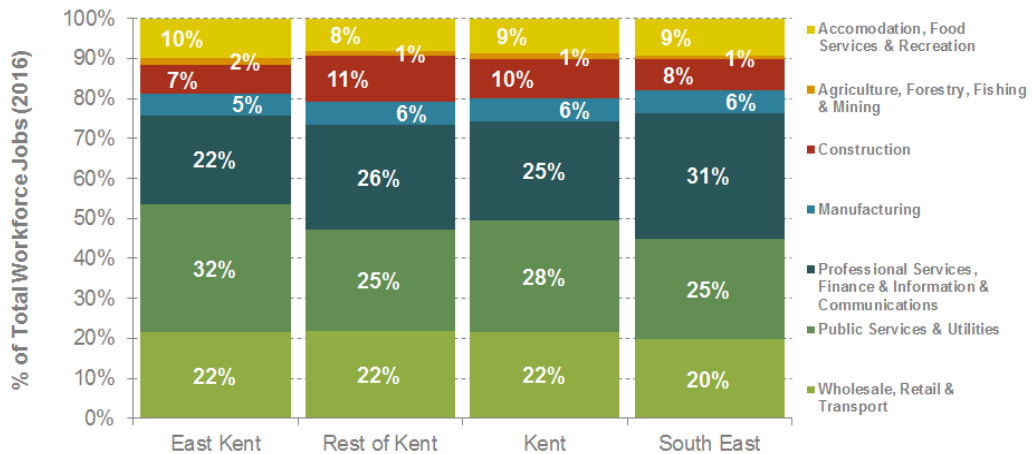
Figure 2.4 Employment Change by Sector, 1997-2016



Source: Experian (September 2016) / Lichfields analysis

2.9 Despite this positive trend, the relative size of East Kent’s ‘knowledge based’ economy remains smaller than elsewhere in Kent and the wider South East, with a greater share of public sector jobs and a smaller share of higher value sector jobs compared with regional and sub-regional benchmarks (Figure 2.5).

Figure 2.5 Proportion of Employment by Main Sector



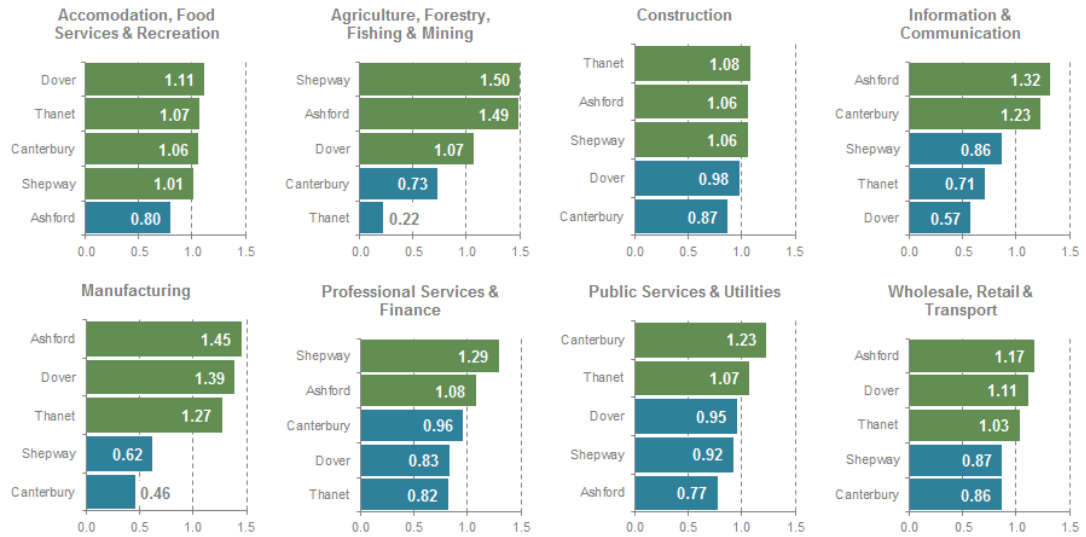
Source: Experian (September 2016) / Lichfields analysis

2.10 Figure 2.6 shows how the sectoral composition of each economy in East Kent differs with reference to broad sectors. This indicates specialisation in some higher value ‘wealth-generating’ sectors such as information & communication, professional services and finance, mainly limited to Ashford, Canterbury and Shepway. Traditional industries such

as agriculture, manufacturing, construction and extractive industries and utilities are also prevalent, in all local authority areas except Canterbury.

2.11 Figure 2.6 also shows that for some sectors such as construction, accommodation, food and recreation services, local representation in employment terms is fairly similar within East Kent. However, for other sectors such as manufacturing, ICT and public services, much more of a variation is evident, underlining locally specific strengths and opportunities.

Figure 2.6 Sector Specialisation by East Kent Local Authority (Location Quotient)



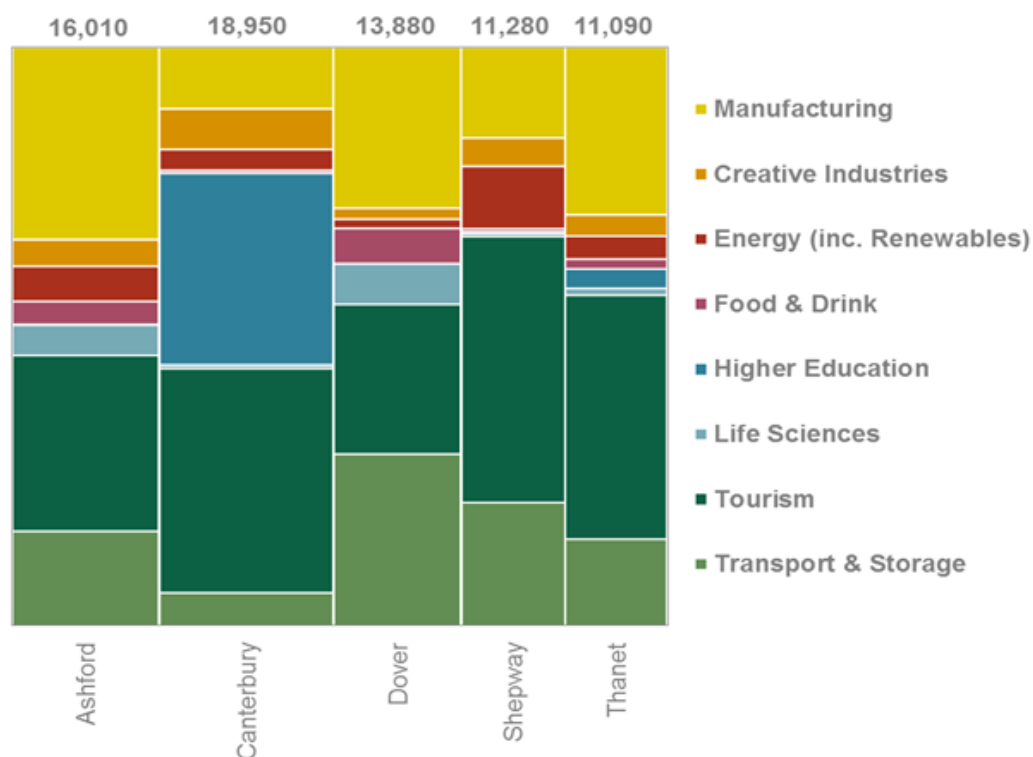
Source: Experian (September 2016) / Lichfields analysis

Note: Location quotients based on East Kent average; values above 1 indicate over-representation, less than 1 indicates under-representation.

2.12 In the 2013 East Kent Growth Plan, seven key ‘sector groups’ were identified as providing particular opportunities for growth within the East Kent economy. Figure 2.7 below indicates that the scale and significance of these growth sectors varies by local authority, with notable concentrations summarised below for each local authority:

- **Ashford:** Manufacturing, life sciences
- **Canterbury:** Higher education, tourism
- **Dover:** Life sciences, transport and storage
- **Shepway:** Tourism, energy
- **Thanet:** Manufacturing, tourism

Figure 2.7 Growth Sector Representation



Source: ONS (Business Register and Employment Survey) / Lichfields analysis Note: refers to all manufacturing sectors

2.13 Within its Strategic Economic Plan, the South East Local Enterprise Partnership (LEP) identifies a number of priority sectors for the SE LEP economy which have high growth potential and through which LEP-wide support for innovation can be targeted. These comprise: advanced manufacturing; life sciences/medical technologies; transport and logistics; low carbon environmental goods and services, creative, cultural and media and the visitor economy.

2.14 These broadly align with those sectors outlined in the 2013 East Kent Growth Plan as having opportunities for growth and the above analysis suggests there is a good spatial representation across the sub-region, albeit with locally specific clusters such as life sciences at Discovery Park, creative and media in Folkestone and Margate, and low carbon in Ramsgate, Whitstable and Dungeness.

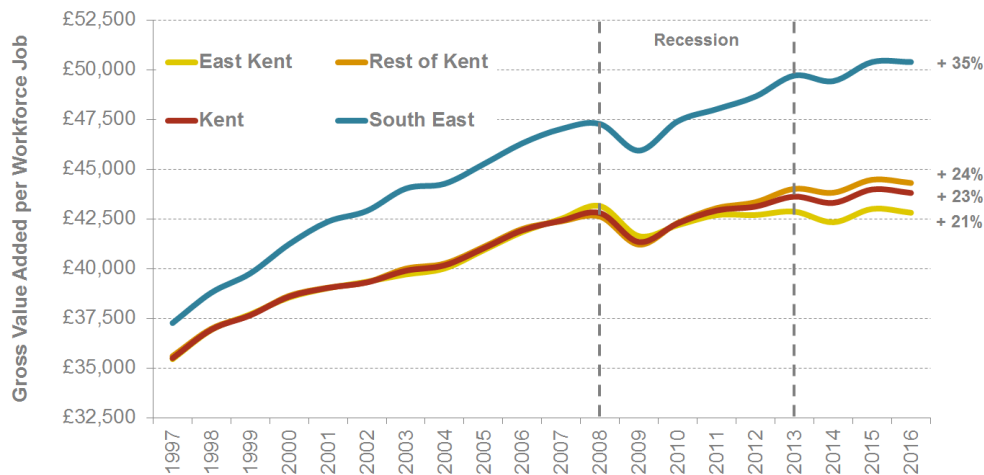
2.15 Nevertheless, the 2013 East Kent Growth Plan also acknowledged that the size of the knowledge economy relative to all employment remains smaller in East Kent than elsewhere in the country; while the indicators suggest that East Kent is making good progress and has a significant concentration of activity at Canterbury, it will need to maintain recent growth rates in order to catch up with more knowledge intensive parts of the country. This issue is not unique to East Kent, and the South East LEP recognises that the LEP area as a whole is relatively more reliant on wholesale, retail and accommodation, and construction jobs, with a lower proportion of employment is in high value 'knowledge economy' sectors.

2.16 This overall analysis of employment and sector distribution inevitably understates the importance of some growing sectors and parts of the economy that are small in overall employment terms, but important in their contribution to local output. An example is creative industries which have been playing an increasingly important role in driving economic growth and regeneration activity in key towns such as Folkestone and Margate.

Economic Output and Productivity

- 2.17 Gross value added (GVA) provides a measure of the value of all the goods and services produced in an economy and can be used as an indicator of economic output, productivity or performance. This can be expressed in terms of the amount of GVA generated per workforce (workplace) job as shown in Figure 2.8.
- 2.18 This reveals a general trend of improving productivity in East Kent over the 19 year period to 2016 which is in line with wider sub-regional and regional trends. This is particularly the case over the first half of the period, although average levels of GVA per workforce job have remained largely unchanged since recession in 2008. This has resulted in a widening productivity gap between East Kent and the rest of Kent and the South East (Figure 2.8).

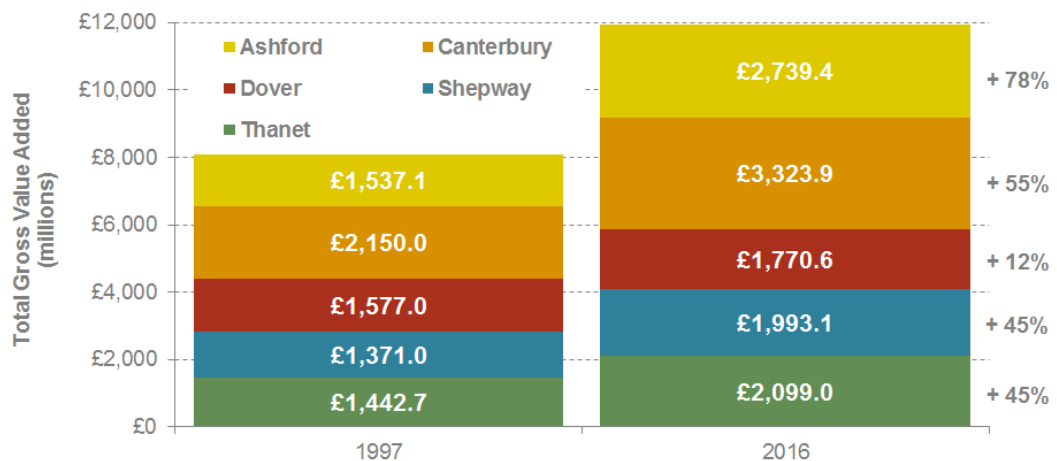
Figure 2.8 Workforce Productivity



Source: Experian (September 2016) / Lichfields analysis

- 2.19 The total economic output measured in terms of Gross Value Added (GVA) of East Kent in 2016 was £11.9 billion. This is broken down by individual local authority area in Figure 2.9 below, emphasising the significant role played by Canterbury and Ashford in particular in driving this output both now (i.e. in 2016) and over the last 19 years; between 1997 and 2016, more than 60% of economic output growth in East Kent was recorded by Ashford and Canterbury.

Figure 2.9 Growth in Economic Output, 1997-2016



Source: Experian (September 2016) / Lichfields analysis

2.20 Within East Kent, average levels of GVA generated per workforce job varies by local authority (Table 2.1). Canterbury and Dover stand out as recording the highest average workforce GVA; in Canterbury this is likely to reflect the presence of Universities and related knowledge based activity, while in Dover the presence of the Discovery Park Enterprise Zone and its cluster of high value R&D activity will help to explain the relatively high levels of GVA.

2.21 Meanwhile, Ashford records the lowest average levels of GVA per workforce job, reflecting its traditional industrial economic base.

Table 2.1 Productivity per Job (Gross Value Added)

Location	GVA per workforce job (2016)
Ashford	41,570
Canterbury	44,140
Dover	43,190
Shepway	42,140
Thanet	42,750
East Kent	42,810
Kent	43,800
South East	50,390
UK	47,250

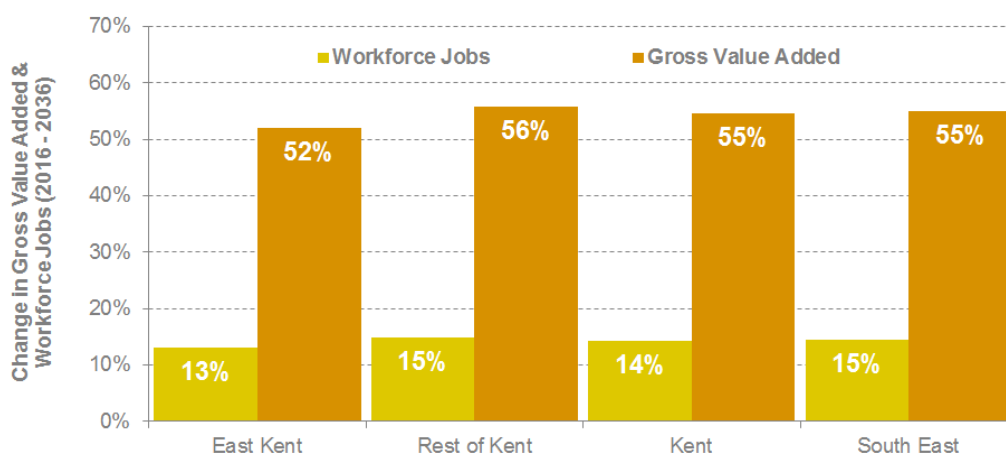
Source: Experian (September 2016) / Lichfields analysis

2.22 Table 2.1 also shows that East Kent performance (£42,810 GVA per job) as a whole still falls behind the wider Kent average (£43,800) as well as the equivalent metric for the South East and UK as a whole. This points to significant scope for improving the competitiveness of East Kent’s workforce.

Future Growth Potential

2.23 Latest employment forecasts prepared by Experian indicate that East Kent has significant potential to grow its economy over the coming years in both employment and economic output (GVA) terms (Figure 2.10). This is equivalent to an increase of 36,500 workforce jobs (1,825 per year on average) and an increase of £6.2 billion in economic output (measured by GVA) (£309 million per year on average).

Figure 2.10 Employment and GVA Forecasts, 2016-2036

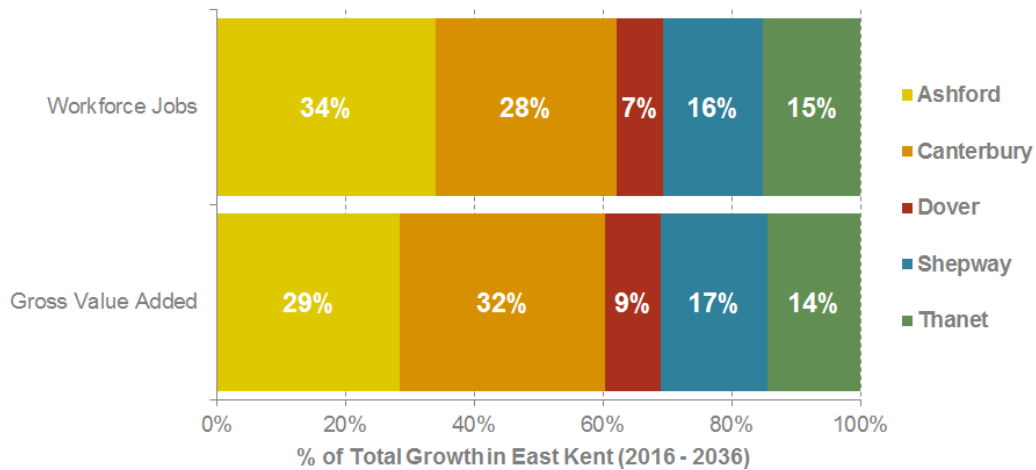


Source: Experian (September 2016) / Lichfields analysis

In proportionate terms, this projected growth for East Kent is lower for both employment and economic output than equivalent projections for the rest of Kent and the South East.

Ashford and Canterbury are expected to remain the main drivers of economic growth in East Kent over the 20 year period to 2036, with the other East Kent authorities of Dover, Shepway and Thanet anticipated to play a smaller role in proportionate terms (Figure 2.11).

Figure 2.11 East Kent Employment and GVA Forecasts



Source: Experian (September 2016) / Lichfields analysis

Summary

- 2.24 East Kent accommodates a sizeable economy, and like the rest of Kent, has recorded strong levels of job growth in recent years. Within the sub-region itself, performance has been more varied. Along with Canterbury, Ashford represents the largest economic centre and key driver of growth in East Kent over recent years, consistently out-performing the other East Kent authorities across a range of economic indicators. By comparison, Dover, Shepway and Thanet have performed less well, yet still play an important role in accommodating some of the more traditional industrial activities such as manufacturing, hospitality and retail.
- 2.25 This resulting east-west divide in East Kent (in terms of economic profile and performance) has widened between the authority areas of Ashford, Canterbury and the remainder of the sub-region, in particular with Dover which has gradually played a less significant role in driving East Kent’s growth. This points to scope for improved economic performance in key locations going forward.
- 2.26 The latest economic forecasts underline East Kent’s strong growth potential over the next few years (albeit lower than that anticipated for Kent and the South East as a whole), with Ashford and Canterbury expected to build upon their recent track record of growth going forward. The indications are that targeted investment and policy interventions may be required to support future growth in Dover, Shepway and Thanet.

3.0 People

3.1 This section explores the population and labour force profile of East Kent, how this relates to commuting flows within and outside of the area and relative skills levels in different locations.

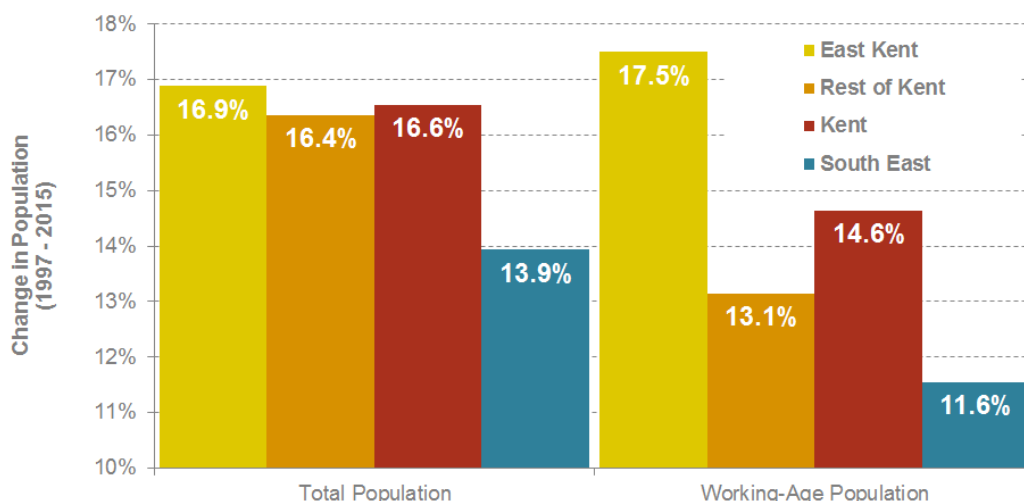
3.2 The following analysis is structured around four broad questions:

- What have been the key population trends?
- What are the key migration patterns to and from East Kent?
- How is the socio-economic profile changing?
- What is the profile of the workforce including commuting flows?

Population Trends

3.3 East Kent has performed relatively well over recent years in terms of population growth; total population in the sub-region stood at 647,250 in 2015, having increased by 93,500 or just under 17% since 1997 (Figure 3.1). This scale of growth outpaced both the Kent-wide and South East average over this period.

Figure 3.1 Total and Working Age Population Growth, 1997-2015



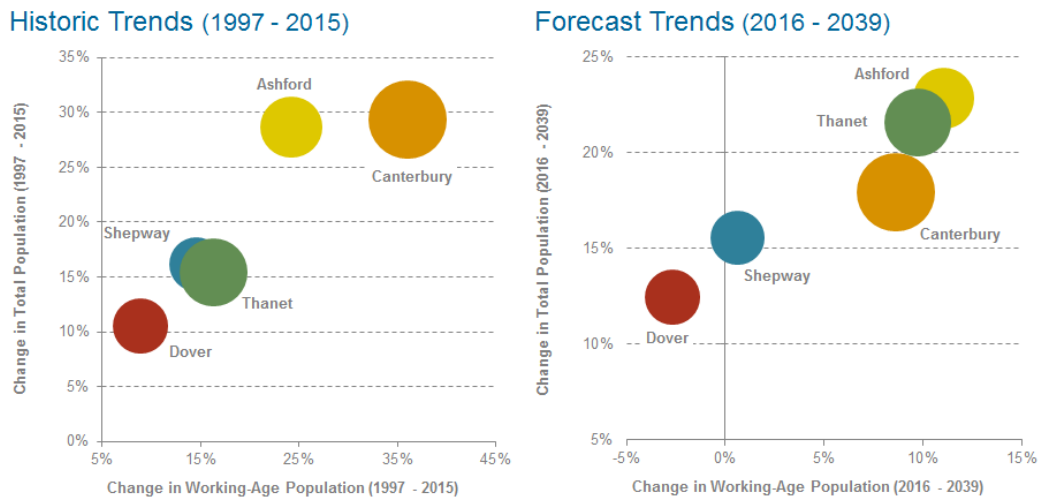
Source: ONS (Mid-Year Population Estimates) / Lichfields analysis

3.4 Figure 3.1 also shows that the working-age segment of the population (defined as those aged between 16 and 64) recorded particularly strong levels of growth over this 18 year period to 2015, also outpacing the equivalent scale of growth recorded in other parts of Kent, and the South East as a whole.

3.5 The authority areas of Ashford and Canterbury have played the most significant role in driving both total and working-age population growth in East Kent over recent years, followed to a lesser extent by Thanet, Shepway and Dover (Figure 3.2). In 2015, Canterbury recorded the largest population in East Kent, in both overall and working-age terms.

3.6 This trend was also highlighted in the previous 2013 East Kent Growth Plan, which noted that recent population growth had been concentrated in those parts of East Kent that have seen the largest amount of new housing development, with the strongest increases in Ashford and Canterbury.

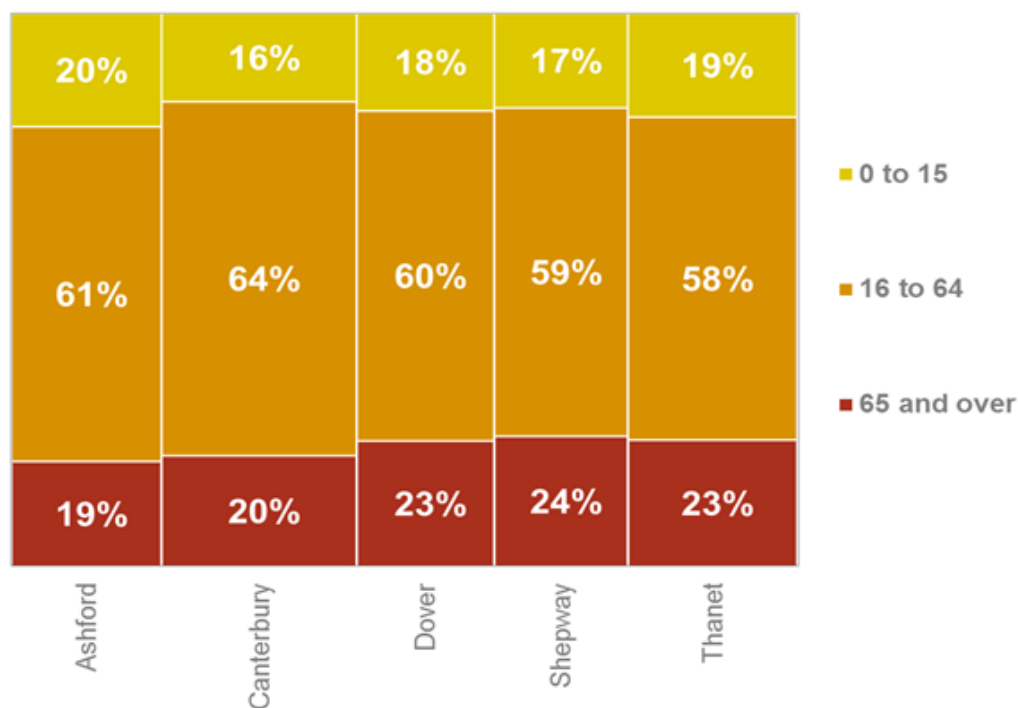
Figure 3.2 Working Age Population Growth



Source: ONS (Mid-Year Population Estimates / Sub-National Population Projections) / Lichfields analysis

- 3.7 As illustrated in Figure 3.2, most parts of East Kent are expected to see future population growth, although it is clear that some locations are expected to record a greater proportionate increase than others. Latest Government population projections suggest that Ashford, Thanet and Canterbury have the greatest scope for population growth over the next 23 years to 2039. For Ashford and Canterbury, this provides an opportunity to cement their role as key population centres in East Kent, while for Thanet this could provide a step change in the scale of population change and growth recorded in the District
- 3.8 Dover is expected to see an increase in its overall population but represents the only authority area in East Kent to see a forecast decline in its working-age population over the period to 2039, according to the latest baseline data.
- 3.9 It is also worth noting that implied population growth across the whole sub-region is anticipated to fall below historic trends, suggesting a gradual slow down over the coming years (Figure 3.2).
- 3.10 In 2015 (i.e. the latest year available), East Kent’s share of working-age population (at 61%) broadly reflected the wider Kent (61%) and South East (62%) averages. Within the sub-region, there is limited geographical variation, although the highest share of working-aged people can be found in Canterbury (Figure 3.3). Meanwhile, Ashford supports a slightly higher share of younger aged people (aged under 15) with Shepway, Thanet and Dover supporting a slightly higher share of older aged people (aged 65 and over).

Figure 3.3 Working Age Population Profile

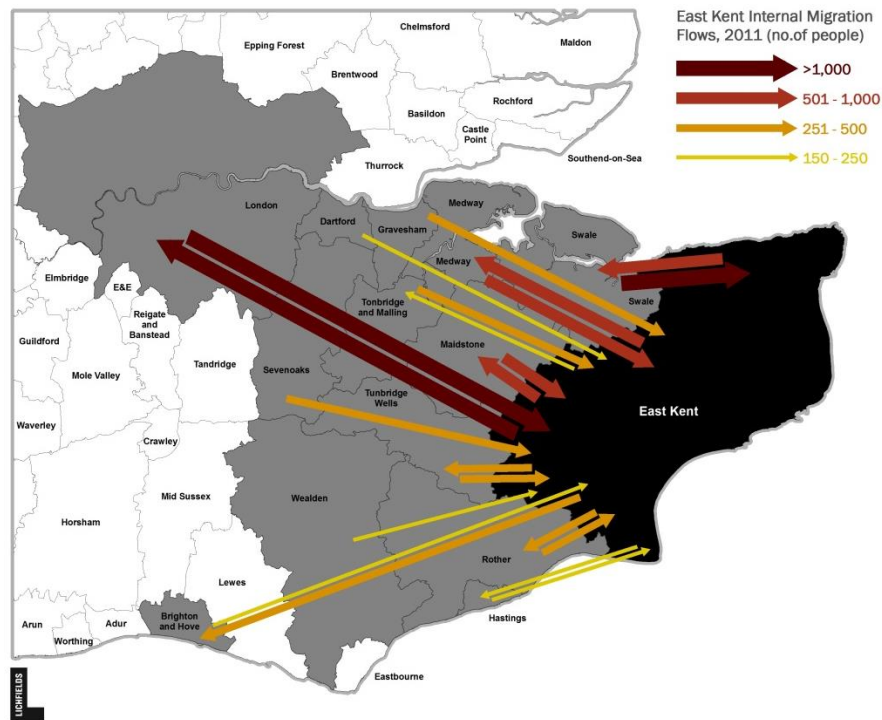


Source: ONS (Mid-Year Population Estimates) / Lichfields analysis

Migration Flows

- 3.11 East Kent experiences significant migration flows with its surrounding hinterland (such as adjoining Kent authorities) as well internally, and these migration patterns are shown below in Figure 3.4. As a combined area, East Kent represents a net importer of migrants from elsewhere, particularly from Greater London and the Kent authorities of Swale, Maidstone and Medway.
- 3.12 Migration has formed an important part of East Kent’s population growth over recent years, and in-migration has in part been driven by the presence of nationally important planned growth points (such as Ashford) as well as the cluster of universities in Canterbury which has historically drawn in strong flows of students, many of whom stay in the area after graduation.

Figure 3.4 East Kent Migration Flows



Source: ONS (2011 Census) / Lichfields analysis

3.13 As summarised in Table 3.1 below, four of the five local authority areas in East Kent received a net migration inflow at the time of the 2011 Census, the largest of which was recorded in Canterbury. Dover stands out as the only local authority in the sub-region to have recorded overall out migration in net terms, albeit this out flow was relatively small in absolute terms.

Table 3.1 East Kent Migration Flows

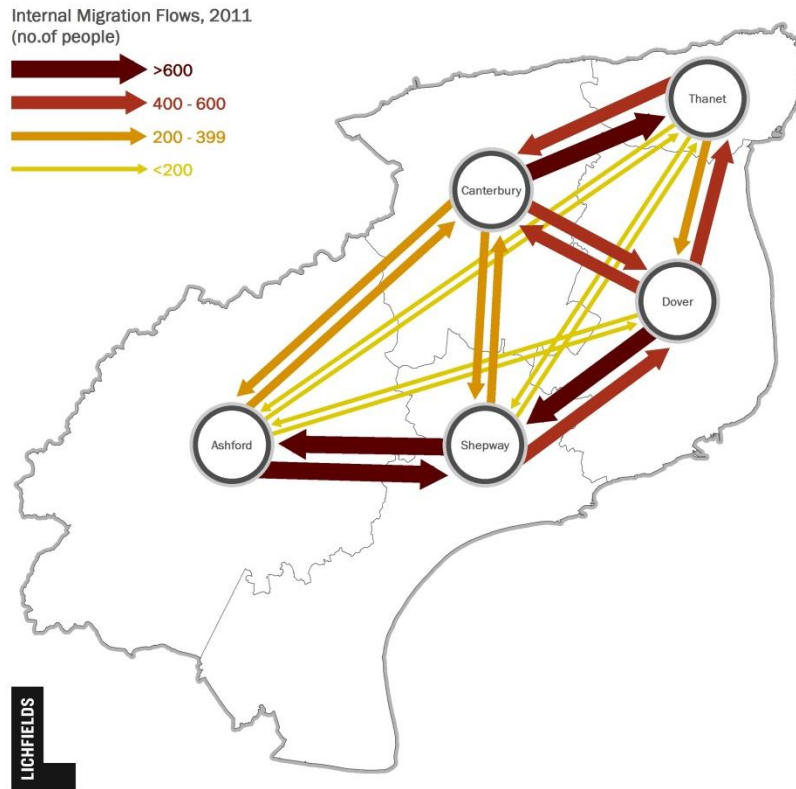
Location	In-Migration	Out-Migration	Balance
Ashford	3,300	3,150	+150
Canterbury	9,100	6,150	+2,950
Dover	2,170	2,200	-20
Shepway	2,990	2,250	+740
Thanet	3,520	2,810	+710
East Kent	21,090	16,560	+4,530

Source: ONS (2011 Census) / Lichfields analysis

3.14 Internal migration patterns within East Kent show significant outward migration from Canterbury to elsewhere in the area, notably Thanet and Dover. 2011 Census net migration flows from within the area for each individual local authority are set out below, and indicate that Ashford, Shepway and Thanet all experience overall net in-migration from elsewhere within East Kent:

- Ashford: +110
- Canterbury: -310
- Dover: -50
- Shepway: +120
- Thanet: +130

Figure 3.5 East Kent Internal Migration Flows

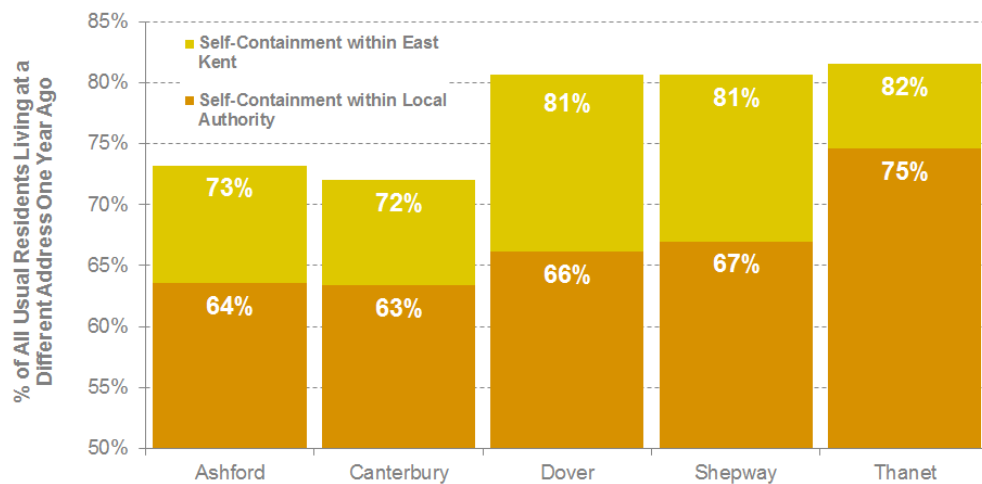


Source: ONS (2011 Census) / Lichfields analysis

3.15

Data from the 2011 Census 2011 also shows that most people that move house in East Kent do so within the same local authority area or within the wider East Kent sub-region (Figure 3.5). This is particularly the case for residents of Thanet, Dover and Shepway, while residents of Ashford and Canterbury are more likely to have relocated from further afield.

Figure 3.6 Migration Self Containment



Source: ONS (2011 Census) / Lichfields analysis

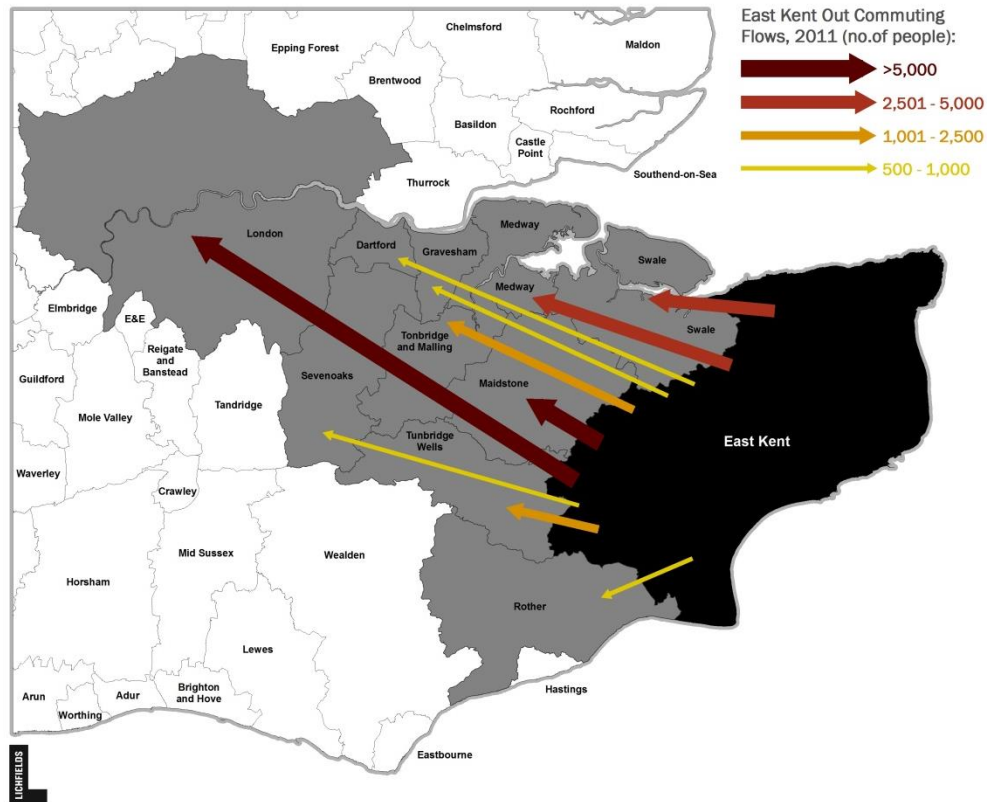
3.16

This data suggests that Canterbury acts as the main attractor of people into East Kent, although many of these people then migrate outwards from Canterbury to other parts of the area, in particular to the coastal authorities of Thanet and Dover.

Commuting Flows

3.17 Drawing on 2011 Census data, it is possible to investigate commuting patterns relating to the volume of workers entering and exiting East Kent for employment. About 37,100 workers or 17% of the total living in East Kent commuted outside the area for their employment in 2011¹. The most significant outflow of workers were to Maidstone, Swale and Westminster, while Medway and Tonbridge and Malling were also relatively popular commuting destinations (Figure 3.7). Greater London Boroughs accounted for around a third (32%) of East Kent’s out-commuters.

Figure 3.7 Out Commuting Flows from East Kent

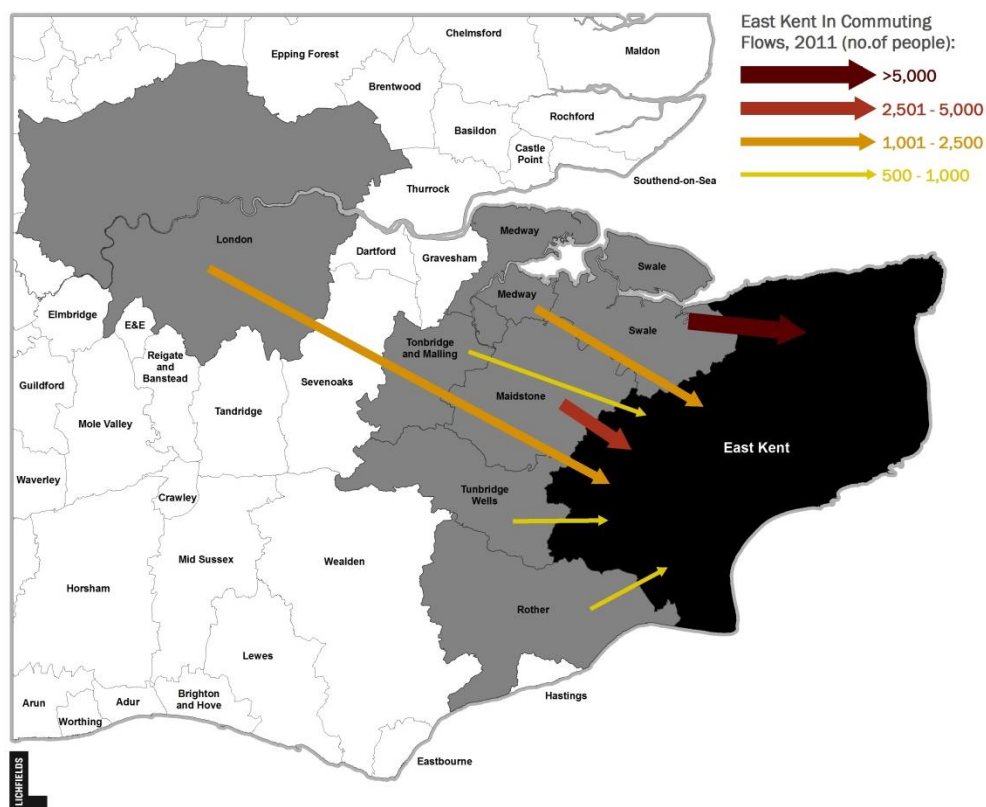


Source: ONS (2011 Census) / Lichfields analysis

3.18 At the same time a large flow of workers travelled into East Kent for employment in 2011. These flows totalled approximately 17,600 workers, equivalent to around 9% of workplace jobs in East Kent. The largest inflow of workers came from the Kent authorities of Swale, Maidstone and Medway (Figure 3.8).

¹ Excluding ‘other’ categories of commuters: Mainly work at or from home, No fixed place, Outside UK, Offshore installation

Figure 3.8 In Commuting Flows to East Kent

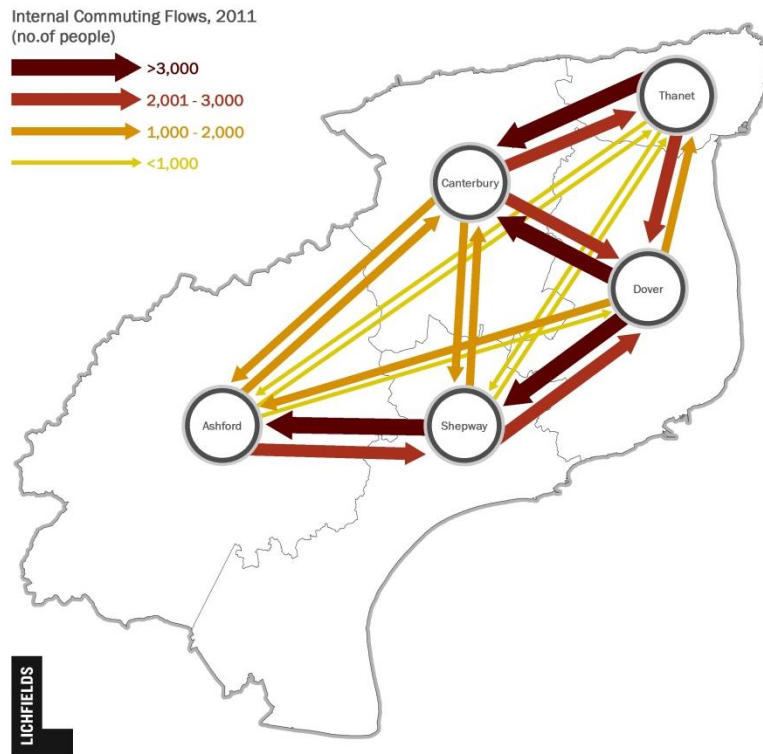


Source: ONS (2011 Census) / Lichfields analysis

- 3.19 In contrast to the relatively dispersed outflow of workers from East Kent, the inflow of workers came from a more concentrated area generally not extending far beyond Kent itself (Figure 3.8).
- 3.20 On balance, East Kent can be characterised as a net exporter of labour with a large net outflow of around 19,500 workers. However the significant outflow of workers from the area should also be considered in the context of an overall self-containment rate of 83%², which indicates that the majority of workers live and work locally within East Kent.
- 3.21 Considering East Kent as a single labour market area (i.e. excluding all commuting flows to/from East Kent), Figure 3.9 shows that Ashford and Canterbury are both net importers, playing an important role in providing employment opportunities for both residents of their own districts and the authority areas of Thanet, Dover and Shepway, all of which are net exporters of labour in East Kent terms. It illustrates an east-west split in terms of the labour profile of individual authorities, with the larger centres of Ashford and Canterbury ‘drawing in’ strong flows of East Kent commuters at the expense of the eastern coastal authorities.

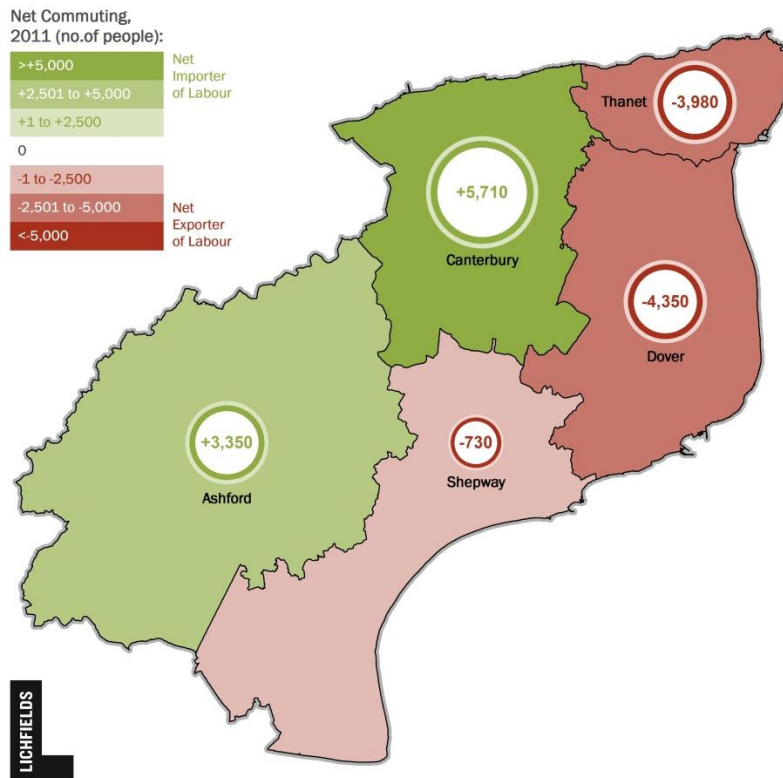
² Excluding ‘other’ categories of commuters: Mainly work at or from home, No fixed place, Outside UK, Offshore installation

Figure 3.9 Internal Commuting Flows within East Kent



Source: ONS (2011 Census) / Lichfield analysis

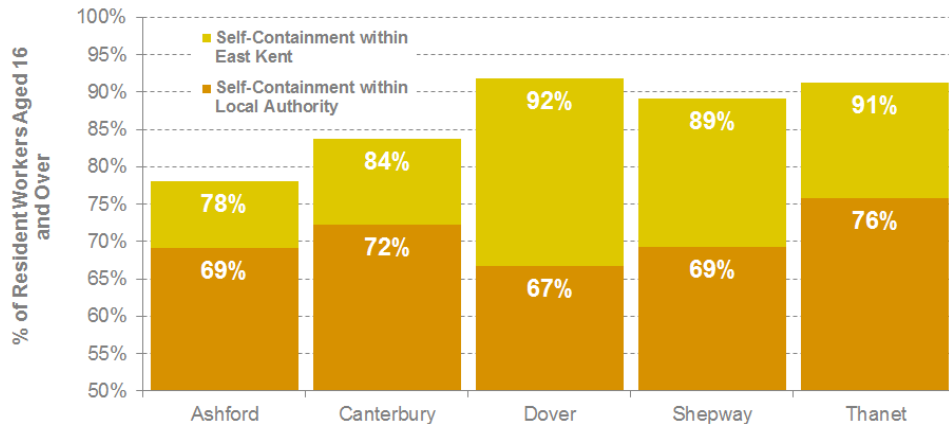
Figure 3.10 Net Commuting Balance by East Kent Local Authority



Source: ONS (2011 Census) / Lichfields analysis

3.22 Census 2011 data also shows that labour self-containment within East Kent is highest in the most eastern local authorities of Dover, Thanet and Shepway, with working residents of Ashford and Canterbury more likely to commute outside of the sub-region for their work (Figure 3.11).

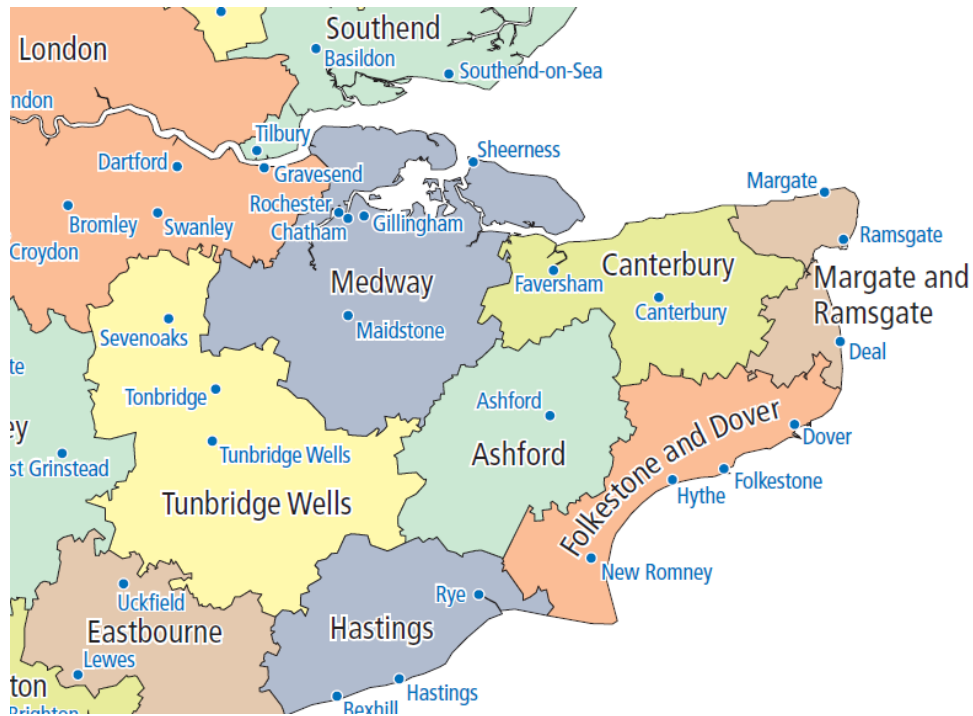
Figure 3.11 Commuting Self Containment



Source: ONS (2011 Census) / Lichfields analysis

3.23 In 2015, the ONS used 2011 Census data on home and work addresses to define 228 Travel to Work Areas (TTWAs) that cover the whole of the UK. This assessment identified four TTWAs that cover the East Kent sub-region; Canterbury, Margate and Ramsgate, Folkestone and Dover, and Ashford (Figure 3.12). This underlines the significant role played by the centres of Ashford and Canterbury in providing employment opportunities for the wider area. By contrast, the coastal stretch from New Romney in the south to Margate in the north is characterised by a larger number of smaller centres, which only when grouped together, form their own labour market area.

Figure 3.12 2011 Travel to Work Areas

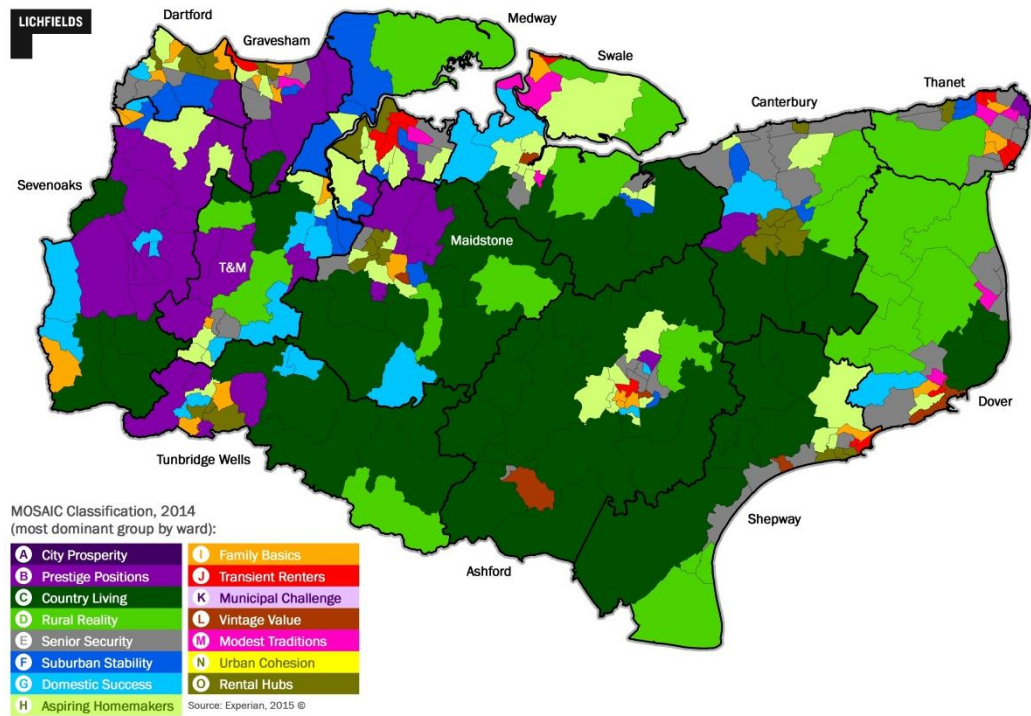


Source: ONS

Socio-Economic Profile

- 3.24 A guide to the characteristics and mix of different communities is available from Experian's Mosaic dataset. Widely used in policy making as well as commercial research, Mosaic uses a range of datasets to build a profile of any local population based on a series of person-type, household types and group typologies. These consumer classifications are designed to help understand the demographics, lifestyles, preferences and behaviours of the UK adult population in detail at small geographic levels. Mosaic classifies areas into one of fifteen categories dependent on the prevailing patterns. This analysis has been undertaken for East Kent and is set out in Figure 3.13 overleaf.
- 3.25 This identifies a mixed socio-economic profile with significant areas of the sub-region characterised by 'country living' and 'rural reality' socio-economic groups, with large stretches of the coastline within Shepway, Dover, Thanet and Canterbury accommodating clusters of retired residents falling within the 'senior security' group.
- 3.26 It also shows that Canterbury city, parts of Ashford town and Folkestone attract those on starter salaries (young workers) in the 'Rental Hubs' as well as 'Aspiring Home Owners' who typically comprise younger working families. Compared with the rest of Kent, there is a very low concentration of more affluent socio-economic groups such as 'city prosperity' and 'prestige positions' in East Kent, with rare pockets found to the north of Ashford town, to the east of Canterbury city and within the Kingsgate area of Margate (Figure 3.13).
- 3.27 The LEP notes within its Strategic Economic Plan that economic activity is not evenly spread across the LEP area, with unemployment tending to be higher in more peripheral parts of the LEP, particularly in the coastal communities including Thanet.

Figure 3.13 Socio-Economic Classification by Ward



A City Prosperity	High value properties in central city areas, those living there have high status jobs and low car ownership.
B Prestige Positions	High value detached homes, those living there tend to be married couples with older children working in managerial/senior positions.
C Country Living	Attractive detached homes in rural locations, homeowners tend to be well-off and there is high car ownership. There is also a higher rate of self-employment.
D Rural Reality	Affordable value homes in rural locations including villages. Those living here are mostly homeowners and agricultural employees.
E Senior Security	Homeowners in comfortable homes including elderly singles and couples. Those living here tend to be low mileage drivers.
F Suburban Stability	Suburban mid-range homes (3 bedrooms). Those living here tend to be older families with some adult children at home.
G Domestic Success	Upmarket suburban housing (3 or 4 bedrooms) owned with a mortgage. Those living here tend to be families with children.
H Aspiring Homemakers	Private suburbs with affordable housing costs. Those living here tend to be younger households in full time employment on starter salaries.
I Family Basics	Those who live here tend to be families with children aged between 25 and 40. Some may own low cost housing while some will rent from social landlords.
J Transient Renters	Those who live here tend to be singles and sharers who are privately renting low cost housing, typically terraced properties. There is generally a low length of residence.
K Municipal Challenge	Those who live here tend to be social renters living in low cost housing with a low income. There are often few employment options in these locations.
L Vintage Value	Those living here tend to be elderly and living alone on low incomes in small houses and flats.
M Modest Traditions	Those living here tend to be mature homeowners on modest incomes living in affordable housing in suburban locations.
N Urban Cohesion	Those living here tend to be multicultural settled extended families living in the city suburbs who own their properties (3 bedrooms).
O Rental Hubs	Those living here tend to be 18 and 35 singles or sharers living in urban locations within the private rental sector.

Source: Experian, 2014 ©

Qualifications and Skills

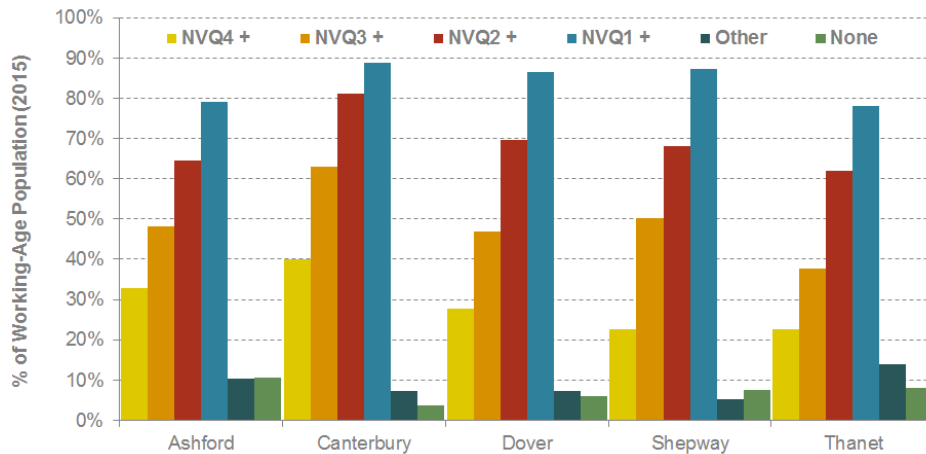
3.28

Figure 3.14 shows that Canterbury and Ashford support the most qualified working-age population in East Kent in terms of NVQ attainment, while Thanet and Shepway score lowest on this measure. This trend was also noted in the previous East Kent Growth Plan. On NVQ Level 4 and above (i.e. degree level qualification and above), only Canterbury

exceeds Kent, South East and UK wide averages, while Dover, Thanet and Shepway all fall below the LEP-wide average.

3.29 Whilst the proportion of working-age residents holding no qualifications is generally low across East Kent, it stands out at 10% in Ashford indicating the presence of some particular skills gaps and challenges.

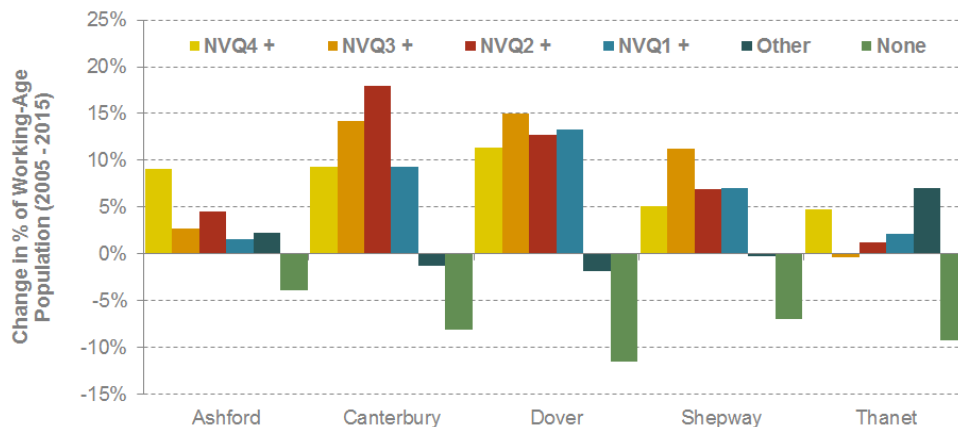
Figure 3.14 NVQ Attainment Levels by Local Authority



Source: ONS (Annual Population Survey) / Lichfields analysis

3.30 Over the last 10 years, the most significant improvement in working-age resident skills was recorded in Dover (particularly in regards to higher level NVQ4+ and NVQ3+ skills), and to a lesser extent Canterbury (Figure 3.15). In contrast, little change was recorded in Thanet or Ashford, although the proportion of working-age residents holding no qualifications fell right across East Kent, suggesting that the sub-region’s resident skills base has been gradually improving in recent years.

Figure 3.15 Change in NVQ Attainment by Local Authority, 2005-2015



Source: ONS (Annual Population Survey) / Lichfields analysis

3.31 The South East LEP notes that the resulting effect of this below average higher level skills attainment is that companies have been finding it hard to recruit due to skills shortages in recent years. In its SEP, it notes that revenue funding rates are not high enough to enable colleges and providers to make long term investments in their infrastructure to align with skills priorities, particularly in high cost areas such as Advanced Manufacturing. In the absence of higher funding rates, a more focused and locally led investment in skills

infrastructure, managed by SE LEP, would support better alignment with priority sectors, including the purchase of specialist equipment to support new programmes.

- 3.32 The previous East Kent Growth Plan acknowledged the significance of East Kent's higher education base and noted that whilst at county-wide level, Kent performs fairly well in the number of graduates from Kent institutions going on to secure employment in the county, Kent is less successful in attracting back to the county those graduates who moved away to study.
- 3.33 More recent data published by Kent County Council³ suggests that Kent has become more successful in attracting (back) and retaining graduates within its workforce, although London continues to provide a key draw. The analysis also shows that Kent proves to be a popular employment destination for people who studied outside of Kent, mainly graduates from neighbouring authorities, or other authorities in the South East.

Summary

- 3.34 East Kent's population has seen significant change over recent years, including strong population growth. Echoing the situation under the 'economy' theme, a notable east-west divide is evident, with Ashford and Canterbury expected to continue to drive population growth and this will be vital for economic sustainability and vitality going forward.
- 3.35 Part of this recent population change has been driven by migration flows and East Kent is a net importer in migration terms. Canterbury in particular plays a key role in attracting people to East Kent, and its geographical location (alongside Ashford's) partly explains this dynamic. By contrast, Thanet, Dover and Shepway are all more self-contained in migration terms. Once here, many of East Kent's residents move elsewhere within the sub-region, in particular to the coastal authorities.
- 3.36 In labour market terms East Kent is characterised by its strong economic relationships with the wider sub-region and other parts of Kent (and London) and its overall role as a net exporter of labour. Again, an east west split is evident, with Ashford and Canterbury (as East Kent's largest economies) drawing in significant flows of workers from Dover, Thanet and Shepway.
- 3.37 Whilst a number of local TTWAs are evident, this analysis underlines the need for strong connectivity and accessibility between East Kent's key locations and employment centres in order to facilitate the flexible movement of labour and match local residents with suitable employment opportunities.
- 3.38 East Kent has a mixed socio-economic profile but with generally fewer high value household groups and a higher concentration of households facing multiple socio-economic challenges when compared with the rest of Kent. There are also notable pockets of young professionals and families in the sub-regions key towns (such as Folkestone, Dover and Ashford), with clear opportunities through planned development and regeneration to broaden this demographic mix in future.

³ Kent County Council Business Intelligence Report, Origin and Destination of Graduates in Kent 2013/14, September 2015

4.0 Place

4.1 This section considers a range of place based factors in East Kent, in terms of recent patterns of development, market trends and growth capacity issues.

4.2 The following analysis is structured around four broad questions:

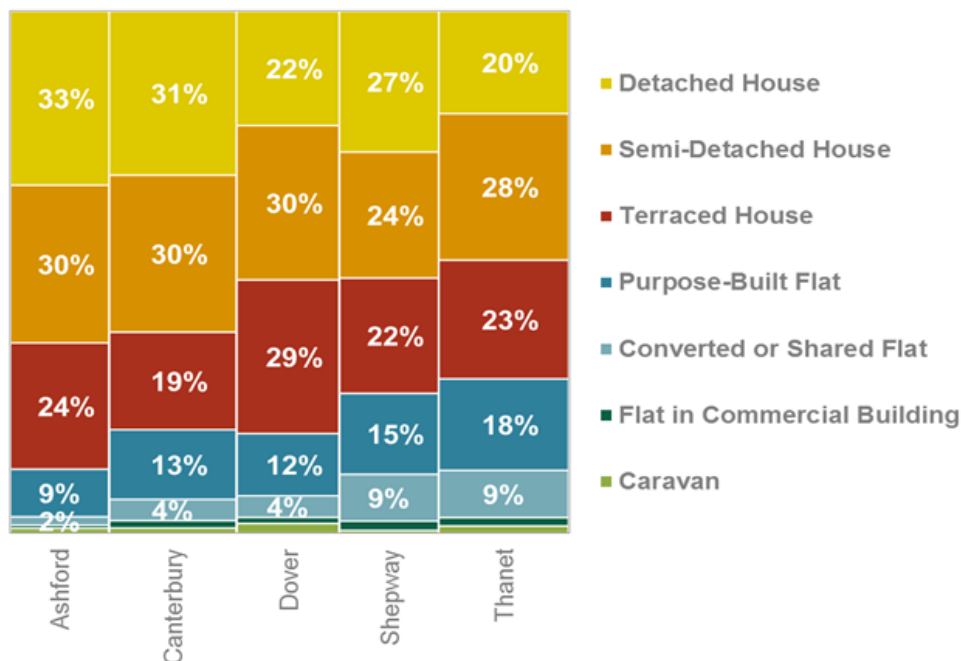
- What is the structure of the housing stock?
- How do affordability challenges vary across East Kent?
- What are the identified infrastructure challenges (and opportunities)?
- What is the profile of the commercial property market?

Housing Stock and Change

4.3 The profile and nature of existing housing stock varies across the East Kent authority areas, with a greater proportion of houses (detached and semi-detached) found in Ashford and Canterbury and the greatest prevalence of flats (purpose built or converted) in Thanet and Shepway (Figure 4.1).

4.4 Housing stock has a key role to play in influencing housing market choices, particularly for those people who might be moving into East Kent. It has an important influence upon the ability of East Kent as a whole and individual local authority areas within the sub-region to attract and retain particular segments of the population, and also impacts upon affordability and patterns of migration (as described in section 3.0) for example if housing aspirations of particular groups cannot be met.

Figure 4.1 Housing Stock by Dwelling Type

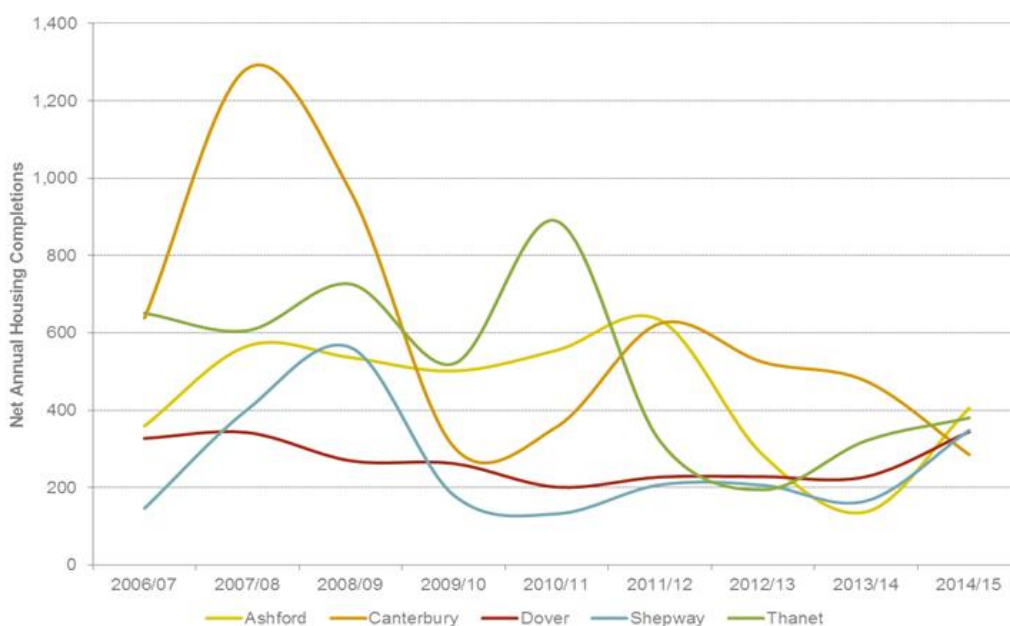


Source: ONS (2011 Census) / Lichfields analysis

4.5 Recent rates of housing delivery across East Kent are summarised in Figure 4.2 below, based upon completions data reported in each local authority's recent annual monitoring reports. The overall trend is one of a gradual slowdown in housing development since

2006/07 following the onset of recession, but with positive signs of a recovery more recently.

Figure 4.2 Housing Completions by Local Authority



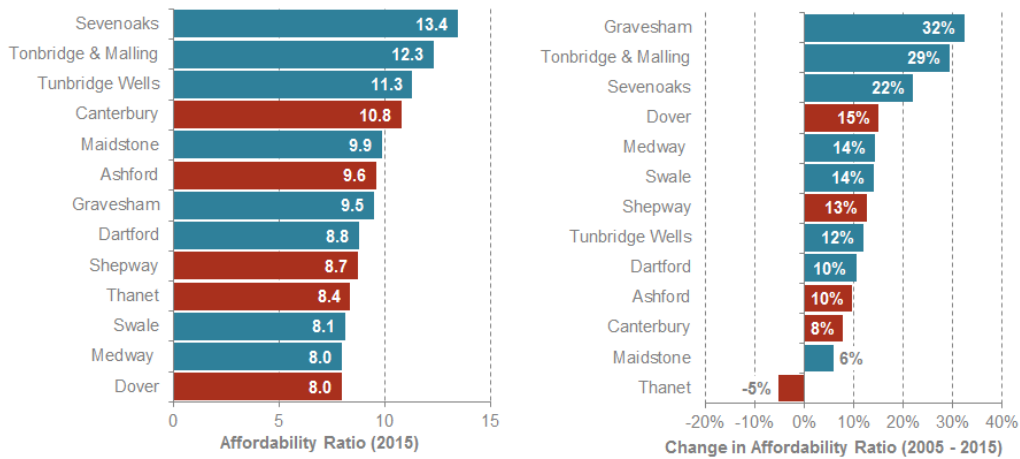
Source: Local authority annual monitoring reports / Lichfields analysis

- 4.6 Whilst housing completions have inevitably fluctuated year-on-year (due to the uneven nature of individual sites and schemes being built out), the authority areas of Thanet, Canterbury and Ashford have consistently outperformed the coastal authorities of Dover and Shepway over recent years, making the most significant contributions towards new housing supply in East Kent over this period.

Housing Affordability

- 4.7 As noted in section 3.0, whilst Canterbury acts as the main attractor of people into East Kent, many people then migrate outwards from Canterbury to other parts of the area, in particular to the coastal authorities of Thanet and Dover. One reason why these patterns of migration, particularly internally, are important in relation to housing market choices relates to affordability. Affordability in the East Kent area varies by local authority, but affordability issues (due to the high cost of housing) are most pronounced in Canterbury and Ashford. Figure 4.3 below shows affordability ratios based on the cost of a median dwelling compared to median earnings in each local authority.
- 4.8 Although Canterbury is the primary destination for migrants moving into East Kent, the evidence suggests that people are unable to afford to stay within the City as their housing requirements change. This affects a number of different types of households including single people, couples and those starting a family for reasons of affordability, but also the types of housing required to accommodate their needs.
- 4.9 Figure 4.3 also shows that the greatest change in affordability ratios has occurred in Dover and Shepway over the past 10 years; although this has helped to bridge the gap between the East Kent authorities, Dover and Shepway continue to represent some of the most affordable local authority areas in East Kent in relation to house prices.

Figure 4.3 Housing Affordability Ratio by Local Authority



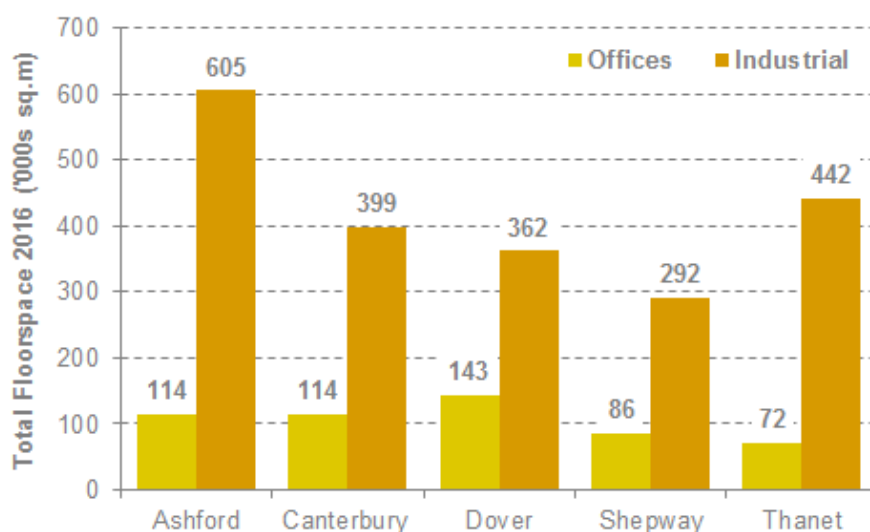
Source: CLG Live Table 576 / Lichfields analysis

- 4.10 The South East LEP identifies two central housing challenges faced by the LEP area; building more houses each year and rebuilding confidence in housing markets in many of its coastal communities and other communities where there are concentrations of severely deprived neighbourhoods. These are areas where the dysfunctional private rented housing sector is currently holding back economic regeneration.

Business Floorspace

- 4.11 In 2016, East Kent recorded approximately 2.6 million sq.m of B class employment floorspace, comprising office, factory and warehouse space. This represents just over a third (34%) of the Kent-wide total.
- 4.12 The largest concentration of overall space is found in Ashford (27% of East Kent total), the smallest in Shepway (14% of East Kent total), with Dover, Canterbury and Thanet all recording a similar scale of total employment floorspace (Figure 4.4).
- 4.13 Based on 2016 VOA data, Ashford is by far the largest industrial centre in East Kent with just under 30% of the total stock of industrial accommodation. Of all five local authority areas, Dover records the largest stock of commercial office floorspace, partly reflecting the presence of large office premises at the Discovery Park Enterprise Zone.

Figure 4.4 Employment Floorspace by Local Authority, 2016

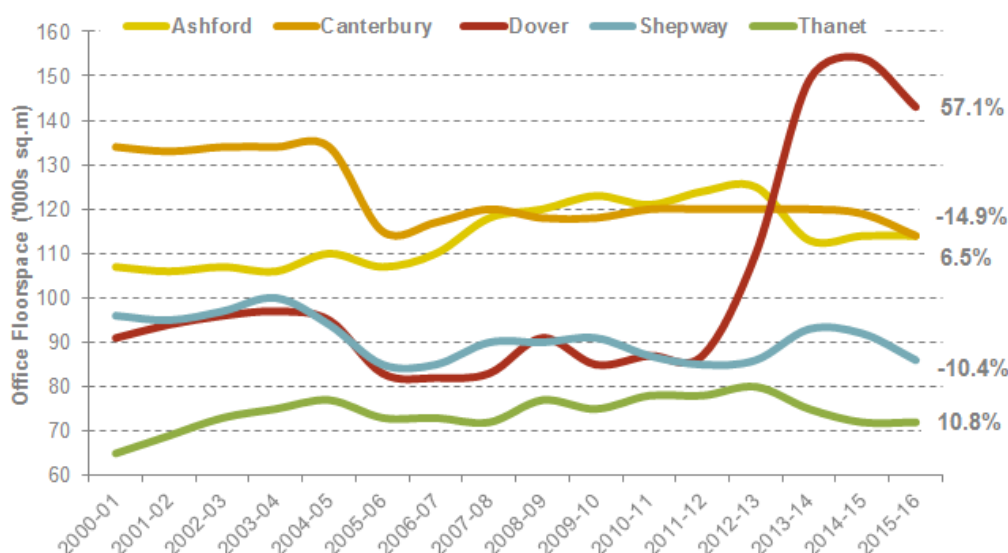


Source: Valuation Office Agency / Lichfields analysis

4.14 Over the last 15 years, the stock of office floorspace in East Kent has increased by around 7%, although the pattern of new development has varied and fluctuated over this time. This scale of growth is consistent with the Kent-wide average, and slightly above the South East equivalent.

4.15 Within East Kent, this overall growth has been driven by Dover, and to a lesser extent, Thanet and Ashford (Figure 4.5). The significant spike in office development in Dover recorded between 2012 and 2015 is understood to relate to the reclassification by the VOA of floorspace formerly occupied by Pfizer at Discovery Park. These increases have helped to offset losses of office space recorded in Canterbury and Shepway over the last 15 years.

Figure 4.5 Office Floorspace by Local Authority

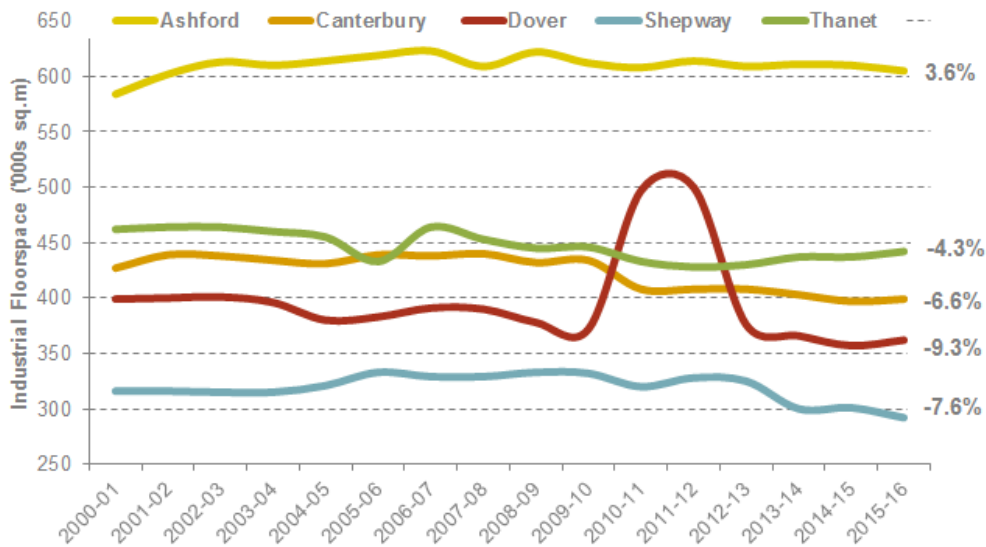


Source: Valuation Office Agency / Lichfields analysis

4.16 The pattern of industrial floorspace change in East Kent has been more even over recent years, with Figure 4.6 illustrating a gradual decline in overall space equivalent to -4%

between 2000 and 2016. This scale of decline was slightly higher than that recorded across Kent (-1.8%) and the South East (0.9%) as a whole over this period.

Figure 4.6 Industrial Floorspace by Local Authority



Source: Valuation Office Agency / Lichfields analysis

4.17 Ashford was the only East Kent authority to see an increase in industrial floorspace over this time. The significant rise and then decline in industrial floorspace shown in Figure 4.6 for Dover between 2010/11 and 2012/13 is understood to relate to the reclassification by the VOA of floorspace formerly occupied by Pfizer at Discovery Park, and has little overall effect on the scale of industrial floorspace decline recorded over the 15 year time series.

Commercial Property Market Trends

4.18 In overall terms, East Kent’s commercial property offer is characterised as fairly diverse, with different locations offering distinct selling points and competitive advantages. Given its strategic accessibility via road and rail, Ashford is likely to be the area’s strongest location to attract mobile investment, although Canterbury maintains a strong retail, leisure and office offer, particularly associated with the City’s higher education presence.

4.19 Further east, the authority areas of Dover, Thanet and Shepway all have ambitious proposals to develop their economic base and business offer, including through the Otterpool Park Garden Town, Advanced Manufacturing Park at Manston and redevelopment of the Discovery Park Enterprise Zone in Sandwich.

4.20 The recent EU referendum vote and resulting economic uncertainty is anticipated to have an impact upon commercial property markets across the country with investor and developer confidence likely to be hit in the short term at least. Nevertheless, sentiment in commercial property appears to be the most positive it has been for many years. While central London offices are still the outperforming market segment, some investors and developers are also looking further afield in an attempt to access stock and achieve good returns.

4.21 Within parts of East Kent, relative values between the cost of land and development and achievable rents/values are currently insufficient for speculative development to occur, and that this is unlikely to change over the short term. This position is not unique to East

Kent; this ‘viability gap’ represents a key barrier to new development across many parts of the wider South East and East Kent in particular, especially within more economically marginal locations and outside of the strongest performing commercial locations.

4.22 The latest (2016) Kent Property Market Report⁴ provides a comprehensive overview of recent trends and future prospects for the sub-region’s commercial property markets, and a summary of key points relevant for the EKGf are provided below.

- 1 Whilst at the macro level growth has slowed recently, the economy is forecast to expand over the coming months. Britain’s decision to leave the EU has led to considerable policy uncertainty and this is likely to persist for some time as the nature of the UK’s exit is worked out and may impact on investment decisions. However, **Kent remains a favourable business location**, with relatively more affordable business and residential property than other parts of the South East, and will remain a vital gateway to continental Europe regardless of the Brexit impact.
- 2 Kent’s occupational market has seen continued activity over recent months and **growing office demand from high value industries** such as the life sciences, creative and technology industries as well as those in the finance and business services sector. High quality affordable office stock and accessibility to London and European markets that surpasses most South East locations, are key drivers. This upturn in demand is reflected by increased rental values and hardening of yields.
- 3 The county’s **industrial and distribution sector saw a year of strong occupational demand**. Average prime rents rose by nearly 7% driven by a number of key lettings, in part reflecting the county’s strategic position in distribution networks and activity. The industrial sector is also seeing greater demand from more technical industry sectors, providing encouraging signs for long-term performance.
- 4 The county’s retail sector will not be immune to economic uncertainty, although Kent’s historic and coastal towns are well placed to benefit from the sudden sharp depreciation of sterling attracting more tourist spending, while **established shopping towns and centres will inevitably maintain their appeal**.
- 5 The county is **seeing much-needed housing development** across a mix of new communities and town centre schemes. The improved performance of Kent’s residential market is evident in the migration of developers from other areas of the home counties across the Kent border. There is also increased demand from build to let investors (particularly in locations such as Ashford) reflecting improved transport accessibility and the quality of town centre life.
- 6 Longer term, the regeneration of Kent’s towns will not only improve performance of the county’s retail centres and residential markets, but also boost their appeal to business. Recent activity has demonstrated that companies, workers and residents seeking a quality urban environment, with strong transport links, are drawn by the county’s regeneration schemes and towns offering a critical mass of skilled labour.

4.23 Linked to this last point, the SE LEP also recognises that its coastal communities are a defining feature of South East England and require bespoke, co-ordinated programmes of investment to enable them to generate the returns available from the enterprise and employment, culture and heritage that their location provides.

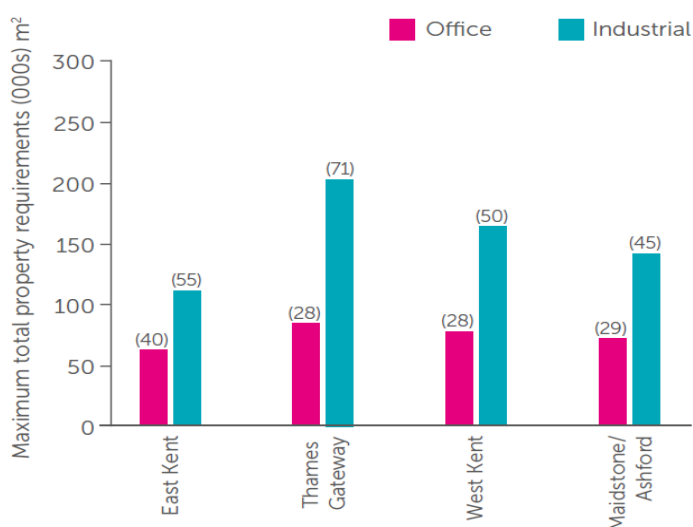
⁴ 2016 Kent Property Market (Kent County Council, Caxtons and Locate in Kent)

Inward Investment

4.24 Locate in Kent – Kent and Medway’s investment promotion agency – maintains a client database that holds details of the property requirements of companies looking to relocate to or expand in Kent. The 2016 Kent Property Market Report provides a summary of recent inward investment trends in the county.

4.25 At the end of June 2016, there were 274 active inward investment projects in Kent. Of these, 183 (67%) had a potential requirement for property or land, equivalent to a total of 298,605sq.m. The highest demand for industrial properties was focused in Thames Gateway, followed by East Kent, West Kent and Maidstone/Ashford. Office demand was more likely to favour Thames Gateway locations, followed by Maidstone/Ashford and West Kent (Figure 4.7).

Figure 4.7 Total office and industrial property demand by sub-region, June 2016

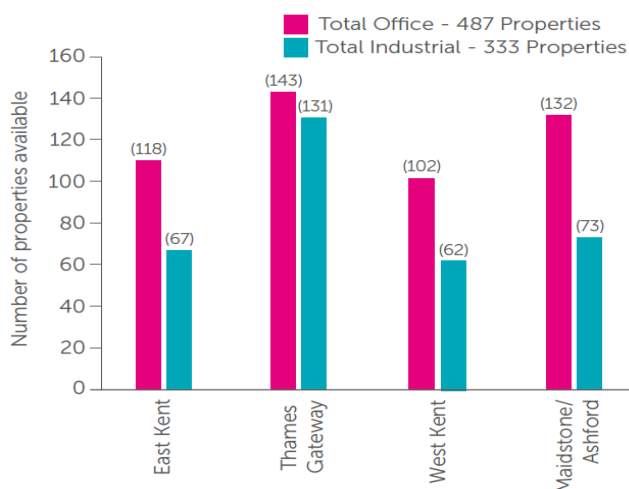


Figures in brackets = no. of active projects at June 2016
 (NB. Some projects may have had demands for property in more than one area of Kent.)

Source: 2016 Kent Property Market (Kent County Council, Caxtons and Locate in Kent)

4.26 At the end of June 2016, a total of 820 properties were registered on Locate in Kent’s property database. 41% of this supply was industrial in nature, and 59% office. The greatest number of properties overall were available in Thames Gateway, followed by East Kent, Maidstone/Ashford and West Kent (Figure 4.8).

Figure 4.8 Property supply by area, June 2016



Figures in brackets = number of properties logged on Locate in Kent's property database at June 2016

Source: 2016 Kent Property Market (Kent County Council, Caxtons and Locate in Kent)

4.27 This analysis suggests that East Kent is well placed to accommodate inward investment activity in future if it can maintain a good supply of suitable premises and development opportunities in the right locations.

Infrastructure and Connectivity

4.28 A significant amount of evidence base work has recently been undertaken on infrastructure issues and priorities within East Kent including a Growth and Infrastructure Framework (GIF) for Kent and Medway⁵ which provides a framework for identifying and prioritising investment in infrastructure across the sub-region. Where possible, key findings from this work are incorporated into the summary provided below.

Overarching Themes

4.29 East Kent enjoys a unique position as a gateway between Europe, London and the rest of the UK, and benefits from a stock of nationally significant infrastructure, including:

- The only High Speed Line currently in the UK providing fast journey times between the sub-region's key settlements and London;
- Europe's busiest passenger port at Dover, with plans for Port expansion;
- Cross-Channel services via Eurotunnel and international passenger rail services via Eurostar from Ashford;
- Strategic road infrastructure from the Channel to London and the rest of the UK, in particular the A20/ M20 and the A2/M2 corridors;
- Strategic access to Thanet provided by the A299 Thanet Way via the M2.

4.30 Within its Strategic Economic Plan, the South East LEP recognises that the area's sea ports – and the road and rail networks that serve the ports – provide the UK's most important gateway to the rest of the world.

⁵ Kent and Medway Growth and Infrastructure Framework, AECOM September 2015

4.31 In addition to these strategic networks, East Kent also accommodates a number of under-utilised economic assets such as London Ashford Airport (Lydd) in Shepway, which provide further economic growth opportunities should new investment come forward.

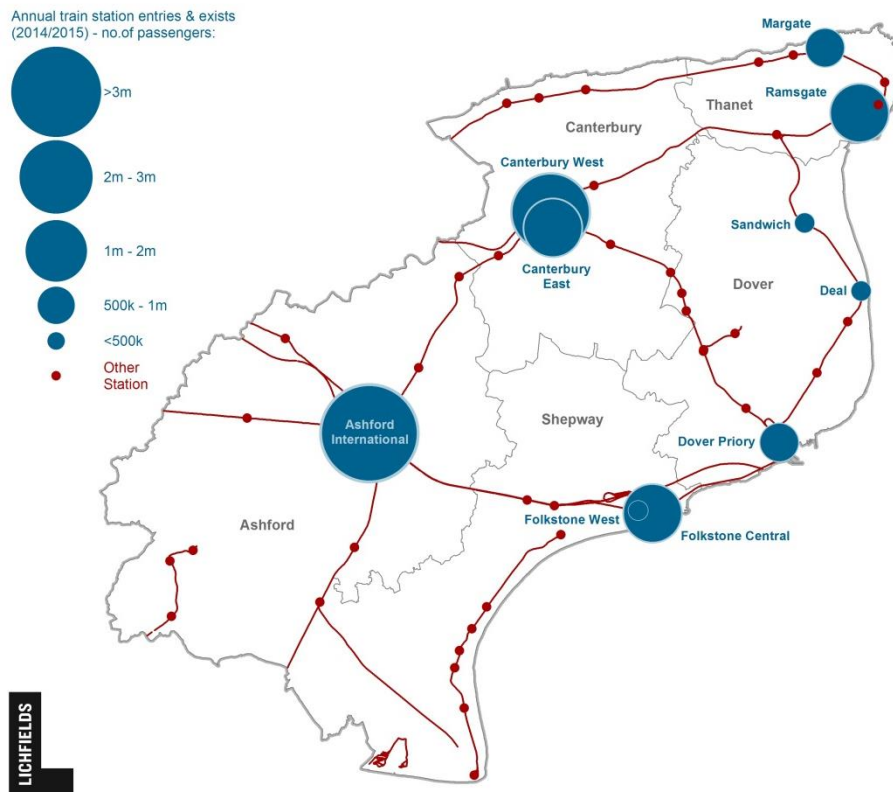
4.32 Whilst strategic routes to and from East Kent are good, the previous Growth Plan noted that the dominance of London-to-coast corridors within East Kent’s transport system and the fact that no single centre is sufficiently dominant to warrant a radial network means that some connections within East Kent are fairly weak, such as road connectivity between Thanet and Ashford. Furthermore, the strategic network suffers from a number of bottlenecks and congestion points which if not addressed, could act to impede future growth within East Kent, and there remains a need to secure comparatively smaller amounts of investment to maximise the local benefits of High Speed One.

Rail Infrastructure

4.33 Data from the Office of Rail and Road illustrates the uneven pattern of train station usage across East Kent (as at 2014/15), with the highest volume of entries/exists recorded at Ashford International and Canterbury West (Figure 4.9). By contrast, stations in Shepway (Folkestone West and Central), Dover (Dover Priory, Deal and Sandwich) and Thanet (Margate and Ramsgate) accommodate much lower volumes of passenger usage.

4.34 These patterns are inevitably closely linked with labour market flows, with commuting data presented in section 3.0 showing strong labour market relationships between East Kent and London, facilitated by Ashford and Canterbury’s competitive journey times to the Capital, while strong station usage here can also be explained by their respective roles as key employment hubs within the sub-region.

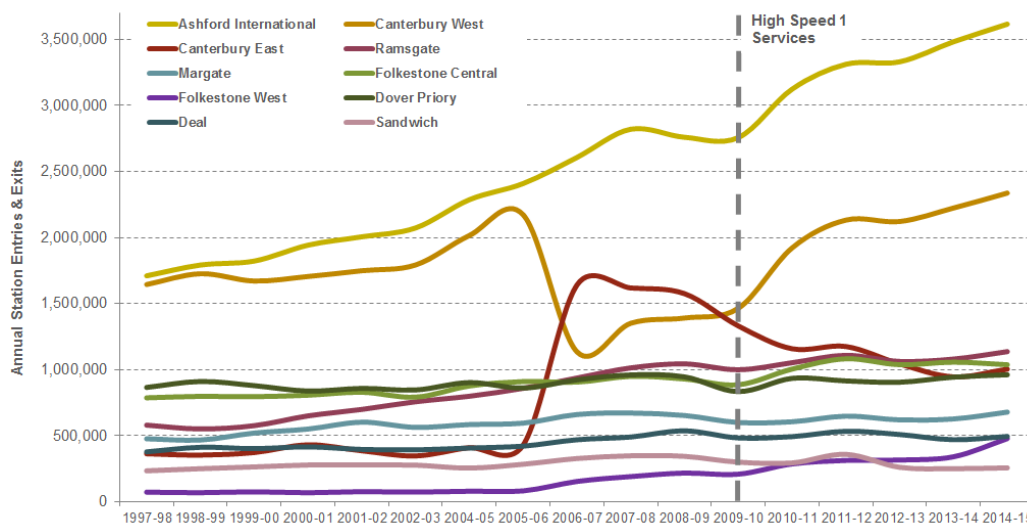
Figure 4.9 Annual Station Entries and Exits (2014/15)



Source: Office of Rail and Road 2014-15 / Lichfields analysis

- 4.35 Rail station usage in East Kent has increased since the recent introduction of high speed rail services (Figure 4.10) and station usage has consistently been highest at Ashford International and Canterbury West over the last 16 years.

Figure 4.10 Annual Station Entries and Exits



Source: Office of Rail and Road 2014-15/ Lichfields analysis

- 4.36 High speed domestic rail services have significantly reduced journey times between East Kent and London since the introduction of the new service in December 2009. To date, these benefits have primarily been felt in Ashford, and to a lesser extent in Folkestone and Canterbury, all of which are now within an hour of central London via High Speed One (HS1) services.
- 4.37 Further east, the Thanet towns have benefited from improved journey times via HS1, but remain relatively disadvantaged within the East Kent context. Recent investment has recently been secured to improve the Ashford to Ramsgate route, allowing Thanet to benefit to a greater degree from HS1. Figure 4.10 shows that passenger usage of rail stations in Thanet, Dover and Shepway has increased more gradually over recent years when compared with Ashford and Canterbury. Some locations that remain dependent on more localised services (such as Whitstable and Herne Bay on the North Kent line) continue to experience lengthy journey times, which in some cases have deteriorated as timetables have been changed to accommodate the HS1 schedule. The opportunity therefore exists for residents of these parts of East Kent to further benefit from improved connectivity presented by the sub-regions rail infrastructure, subject to necessary investment in more localised connections.
- 4.38 The need for investment in Kent's existing rail infrastructure has recently been articulated by the Kent and Medway Economic Partnership who are currently preparing a Rail Strategy for Kent & Medway in order to link new investment opportunities with planned population and job growth in the area. Key priorities relating to East Kent include:
- Ensuring that the new Thameslink services to the city via London Bridge and Blackfriars from the Maidstone East line and Medway Towns are introduced successfully in 2018;
 - More intensive use of the HS1 infrastructure to deliver growth in Thames Gateway, Ashford, Canterbury, Folkestone, Dover and East Kent;

- Improve access to services at stations, more car parking, integrated transport cycle and walking access; and
- Maintain international access to Ashford.

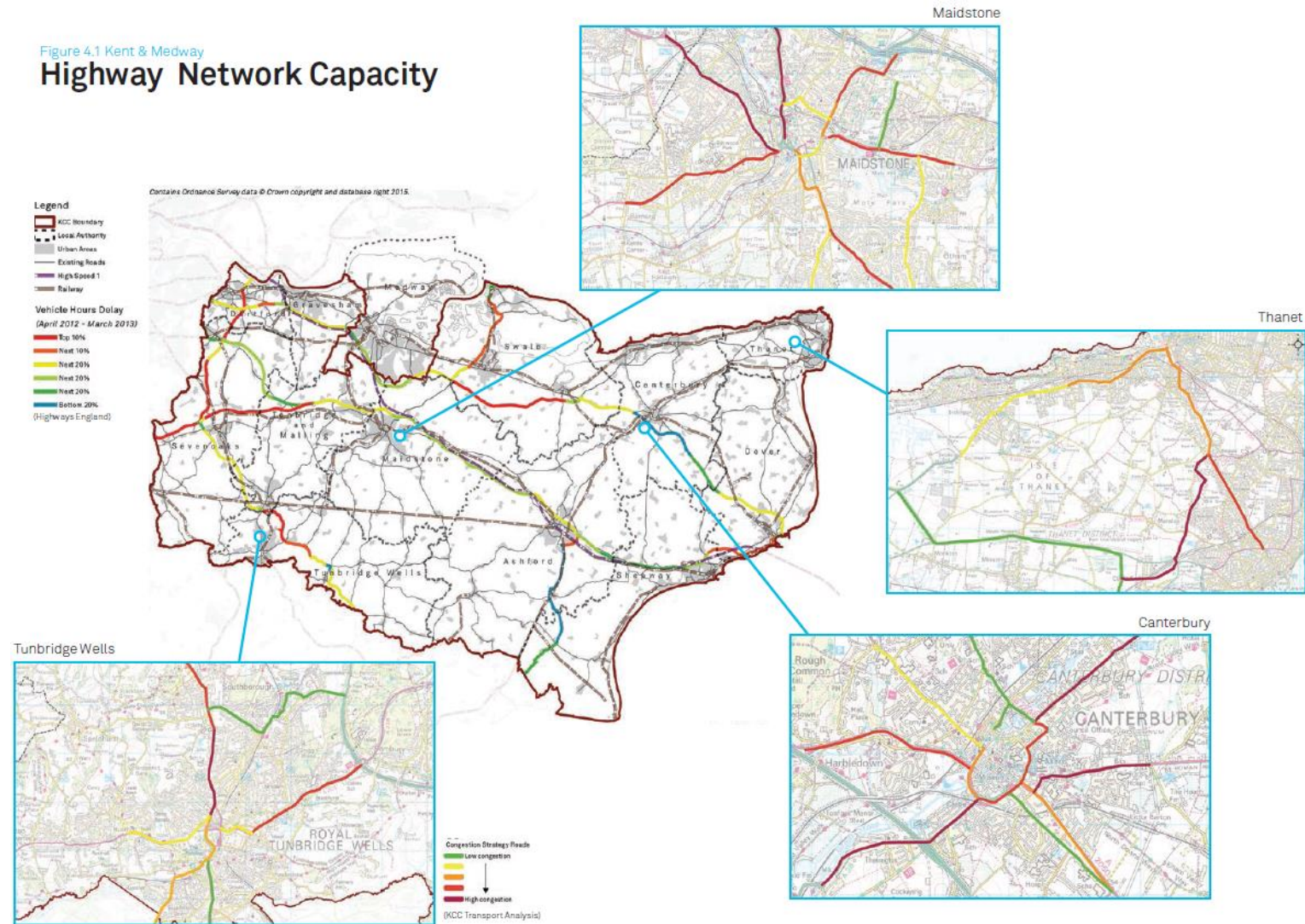
Highways Infrastructure

- 4.39 The Kent and Medway GIF notes that the sub-region is currently facing increased congestion, on both road and rail. Major routes such as the M20, A2/M2 and A21 form important local and strategic links that when congested result in delay on the wider local network. The study acknowledges that with increasing congestion in Kent's major town centres such as Ashford and Canterbury, growth across the County will be constrained without investment in increasing capacity.
- 4.40 Kent and Medway's highways play a significant role in carrying strategic through traffic as well as intra-urban movements. Current levels of congestion on Highway's England's road network and locally within key urban centres across Medway and Kent are shown in Figure 4.11 below, indicating that much of Kent's strategic road network and the key urban centres witness delay during peak periods. The growth proposed will further add to this congestion unless suitable intervention is implemented.
- 4.41 Of major sub-regional significance is the Government's planned Lower Thames Crossing for which a preferred route comprising a bored tunnel crossing under the River Thames east of Gravesend and Tilbury was announced in April 2017.⁶ The Crossing has the potential to generate significant economic benefits and growth opportunities for East Kent if the area's road networks can be upgraded to effectively facilitate the enhanced connectivity brought about by this new crossing.
- 4.42 SELEP's recent response to the Highways England consultation⁷ states that the Lower Thames Crossing is strongly supported by businesses in the South East and has an important contribution to make to the UK's current productivity challenge and need to increase exports by opening new routes. The view of businesses in the LEP area is that there will be wider opportunities for their growth potential with an opening of this additional route, connecting the south to the north and vice versa while opening up access to wider European networks.
- 4.43 The major ports in the area, including at Dover and Folkestone, are reported to be particularly strong supporters of the proposed crossing and are all planning for increased throughput which will have a significant impact on the highways network. It will also enable Kent County Council's policy objective of "bifurcation" to be implemented, splitting traffic to and from Dover between the M2/A2 and M20/A20 corridors. The aim is to create a high quality strategic corridor that will cater for the significant growth of the port and release capacity on the M20.

⁶ <https://www.gov.uk/government/news/new-lower-thames-crossings-to-cut-congestion-and-create-thousands-of-jobs>

⁷ South East Local Enterprise Partnership, Response to the Lower Thames Crossing Route Consultation 2016

Figure 4.11 East Kent Highway Network Capacity



Source: Growth and Infrastructure Framework for Kent and Medway (September 2015)

Infrastructure Priorities

4.44 Existing infrastructure capacity issues for each local authority in East Kent are summarised in Table 4.1 below.

Table 4.1 Summary of Existing Capacity Issues

Location	Existing Capacity Issues
Ashford	Capacity issues with operation of M20 (schemes identified) Public transport linkages required between town and growth points Existing highway capacity issues at town centre ringroad (schemes identified) Major priorities for Ashford include the J10a, A28 and Ashford International signalling projects
Canterbury	Ring Road a key constraint A2 Junction has limited movement A28 Corridor from Thanet to Ashford a major barrier to east Kent growth Comprehensive package of transport schemes identified – no major areas of concern
Dover	Port activity causes congestion on A20 and A2 corridors Development in the north of Dover dependent upon delivery of public transport connectivity Developments identified within Flood Zone 3 Issue with capacity for treating sewage arising from new houses at Whitfield
Shepway	A20 Congestion issues due to Port Activity Congestion within Folkestone (a number of schemes already identified) Flood risk a significant issue for existing and proposed development, with ongoing investment requirements.
Thanet	Transport improvements to allow for evolution of Westwood Cross Improved accessibility to London and rest of Kent through reduced rail times and new parkway station Regeneration of coastal towns to stimulate wider investment and meet demands from new development Investment in Inner Traffic Circuit to address bottlenecks and unlock development Need to recognise variable land values within the district and address their impact on viability

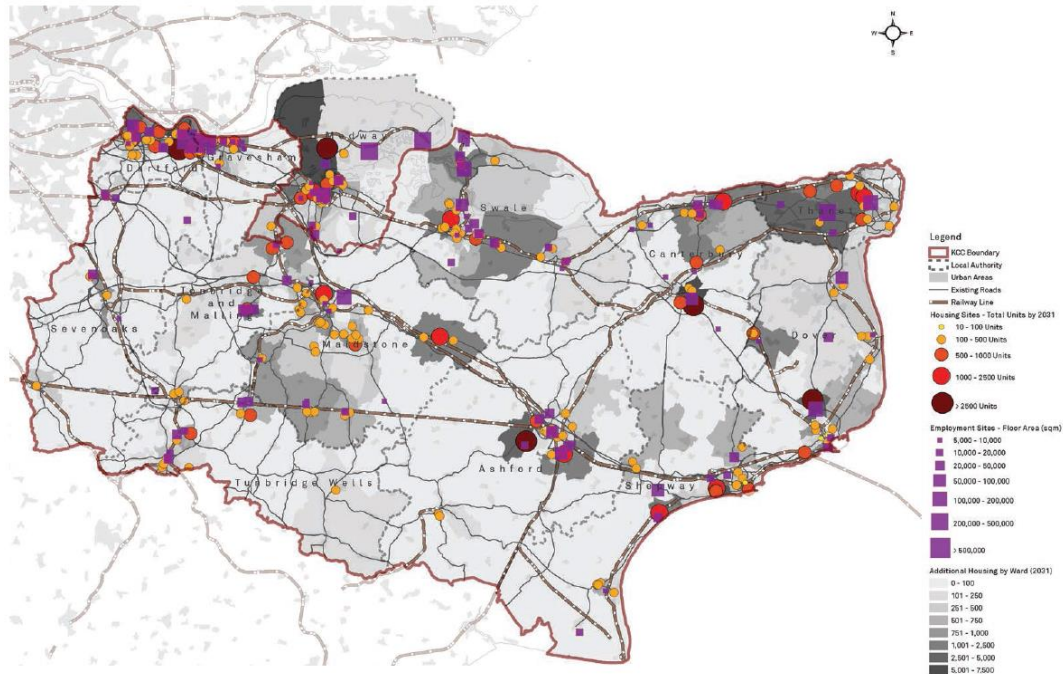
Source: Growth and Infrastructure Framework for Kent and Medway (September 2015)

4.45 The GIF states that addressing capacity issues on the transport network requires careful consideration of where growth is likely to take place and the movement of people in the future. A Census-based analysis of where trips from proposed growth locations in Kent would occur suggested that commuting in the County will predominantly take place intra-district, which suggests that most residents of Kent will continue to work in the same area as where they live. Specifically:

- 79% of all new commuting trips are forecast to remain within the County;
- Dartford will generate 16% of all new work based trips, followed by Maidstone (14%), Medway (13%) and Canterbury (14%);
- London will receive 17% of all new commuting trips, a large proportion expected by rail; and
- Largest trip containment within Thanet at 70%, followed by Canterbury (66%) and Tonbridge and Malling (63%).

4.46 Overcoming these capacity issues will be crucial if the sub-region’s growth potential – as illustrated in Figure 4.12 below – can be realised over the coming years.

Figure 4.12 Housing and Employment Growth in Kent and Medway



Source: Growth and Infrastructure Framework for Kent and Medway (September 2015)

4.47 The South East LEP’s Strategic Economic Plan identifies 12 growth corridors/areas together providing the focus for infrastructure investment. This includes the ‘HS1, A2, A20 & A29’ growth area which is estimated to have capacity for 30,000 new homes and 20,000 jobs by 2021. Key priorities include:

- 1 The opening of High Speed One has dramatically improved access to East Kent, opening up a new corridor for growth – with plans in place for further journey time reductions. Ashford is Kent and Medway’s fastest growing urban centre outside the Thames Gateway; planned investment in M20 Junction 10a will help to unlock Ashford’s growth potential, helping to deliver around 10,000 jobs and 7,000 homes.
- 2 On the A2, Canterbury is an important university city. Beyond Canterbury on the A2, the Port of Dover is already Europe’s largest passenger port and with major plans for expansion. However, significant investment will be required if the area’s long term opportunities are to be realised, in particular in improving the A2 to link an expanded Port of Dover with the planned Lower Thames Crossing.
- 3 North of Dover, Discovery Park at Sandwich has become England’s most successful Enterprise Zone. At Margate and Ramsgate, prospects for growth have been enhanced by investment in transport and cultural infrastructure.
- 4 Folkestone is also benefiting from reduced journey times on High Speed One, and is now within an hour’s journey time of London. This is making a difference to the town’s creative and visitor economy, with the development of Folkestone Creative Quarter and the revitalisation of Folkestone Seafront underpinned by the successful Folkestone Triennial.

Broadband Connectivity

- 4.48 Availability of broadband has significant positive economic, environmental and social impacts. Recent research⁸ emphasises that at the local level economic impacts arise from construction effects, productivity growth, enterprise creation, job creation and increased labour force participation. Broadband is also an enabler for international trade and innovation. BT estimate that for a typical rural area in the South East superfast broadband could lead to an annual increase in GVA of 0.3% per annum over 15 years⁹. The availability and quality of broadband coverage are increasingly essential to the relative attractiveness of an area to do business. The Government's Universal Service Commitment aims to ensure that everyone will have access to at least basic broadband (with a download speed of 2 Mbs). However, as bandwidths available in urban areas improve it is possible that a 'digital-divide' is emerging.¹⁰
- 4.49 Improving East Kent's broadband connectivity has long been recognised as a priority and the 'Making Kent Quicker' programme covers a range of projects that Kent County Council is leading to improve broadband infrastructure and services across the county. The aim of the programme is to bring superfast broadband to more than 140,000 homes and businesses. To date, this work has already brought superfast broadband to over 120,000 homes and businesses, who would otherwise have been left with no, or slow broadband.
- 4.50 Kent County Council is currently working with the Government's broadband agency, Broadband Delivery UK (BDUK) on a second project to further extend the reach of superfast broadband. In Kent, this aims to achieve 95% coverage by the end of 2017 and 95.7% coverage by September 2018. This still leaves a number of East Kent communities with relatively slow access and a number of projects are underway within the East Kent districts to provide solutions to improve speeds in the remaining communities where market failure can be demonstrated.

Summary

- 4.51 The rate of new housing development in East Kent has been uneven over recent years, characterised by a general slowdown following the recession. The reasons for this lumpy and uneven pattern of delivery are manifold, not least as a direct result of land supply and allocations. The authority areas of Canterbury and Ashford have seen the most significant volume of new development, but their housing stock remains the least affordable of all East Kent authority areas.
- 4.52 It offers a range of housing choices, albeit provision varies within the sub-region with greater availability of houses in Ashford and Canterbury, and flats in Thanet and Shepway. This will inevitably influence East Kent's ability to attract and retain particular population groups, including those of working-age and able to contribute to wider economic growth.
- 4.53 East Kent accommodates a relatively buoyant and diverse commercial property market, and although growth in its business space has been sluggish over recent years (due to generally limited levels of new development), recent property market intelligence indicates a positive outlook. Ashford represents the largest commercial centre in terms of stock of employment space and industrial space in particular, with Dover accommodating East Kent's largest stock of office space (due in part to the presence of Discovery Park). Local property agents and stakeholders believe that the planned regeneration of a number of East Kent's town centres will be an important step in maintaining the sub-region's attractiveness to business.

⁸ UK Broadband Economic Impact, Literature Review, SQW, February 2013

⁹ Social Study 2012 The Economic Impact of BT in the United Kingdom and the South-East, Regeneris

¹⁰ UK Broadband Economic Impact Study, Impact Report, SQW, November 2013

- 4.54 The sub-region enjoys a unique position as a gateway between Europe, London and the rest of the UK, and as a result benefits from a stock of nationally significant infrastructure. Nevertheless, its key routes suffer from congestion and this is set to increase as new development continues unless interventions are made to enhance capacity and facilitate cross-county transport links.
- 4.55 A number of locally significant infrastructure capacity issues have been identified by the recent Growth and Infrastructure Framework for Kent and Medway and the strengthening of existing key routes will be vital if the scale of planned new housing and commercial development can be achieved.

5.0 Bringing the Evidence Together

- 5.1 This evidence report brings together a range of data and intelligence to provide a broad strategic narrative of how East Kent’s economy, people and place have changed over recent years and articulate the sub-region’s collective strength as a location for growth. A summary of East Kent’s challenges and opportunities to future economic growth is presented in Table 5.1 overleaf.
- 5.2 Considering East Kent as a single economic entity provides a helpful starting point in developing and showcasing this offer, yet it inevitably masks more local level trends and the specific economic objectives being pursued by each constituent local authority area. Analysis presented within this report shows that relative economic performance varies considerably within East Kent, with the sub-region characterised by a notable east-west divide between Ashford and Canterbury to the west, and the coastal authorities of Dover, Thanet and Shepway to the east.
- 5.3 Part of the success of individual locations in East Kent has been driven by relative attractiveness of these places to residents and businesses. The regeneration of key towns (with a particular focus on town centres) has long been recognised as an economic strategy priority for East Kent authorities although these plans have been slow to come forward (not helped by the recent recession). Various elements of the evidence gathered as part of this report (including as part of the commercial property market and infrastructure themes) point to the catalytic role that these schemes are expected to play in boosting the economic performance of individual locations and East Kent overall.
- 5.4 East Kent benefits from a stock of nationally significant infrastructure that reflects its gateway location. Whilst these key pieces of infrastructure have helped to open up growth opportunities through enhanced connectivity and capacity, these benefits have been unevenly felt across East Kent and infrastructure capacity issues are now emerging right across the sub-region. For example, the London to coast corridor is well served but intra-East Kent links can be comparatively poor. Viability issues in many parts of East Kent also mean that development schemes can stall or fail to come forward as a result of infrastructure ‘show stoppers’.
- 5.5 Whilst East Kent’s commercial property market is relatively diverse and buoyant with recent intelligence pointing to a positive market outlook, delivery of new commercial space has been limited over recent years and viability challenges mean that much of East Kent’s business space is now becoming relatively outdated and in need of redevelopment. It represents an attractive location for inward investment provided that a suitable portfolio of sites/supply can be unlocked and well serviced by infrastructure.
- 5.6 From a sector perspective, East Kent accommodates a number of clusters of high value economic activity, but these tend to be concentrated in relatively isolated pockets, with limited evidence of ‘spill over’ effects into wider parts of the sub-region’s economy. Evidence points to a widening productivity gap between East Kent and the wider sub-region, as well as within East Kent itself. Its resident skills base has been improving over recent years, but still lags behind wider regional and LEP benchmarks. Together, these trends have the potential to inhibit innovation and productivity within East Kent’s business base and restrict its ability to compete at a broader regional and national scale for labour, residents and business. Continued investment in education and training provision linked to particular local sector priorities will therefore be important.

Table 5.1 East Kent SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong working-age population and employment growth in recent years • Rising skill levels and improved productivity across all local authorities • Relatively high levels of labour self-containment in Dover, Shepway and Thanet • Success in attracting in-migrants, particularly to Ashford and Canterbury • Quality of life advantages and cultural offer • Competitive travel times to London and relative ease of commuting to the Capital • Major higher education offer • Comparative affordability of housing and commercial space • Strong demand for commercial space • Presence of strategic infrastructure giving excellent access to London, continental Europe and the wider South East region 	<ul style="list-style-type: none"> • Uneven spatial distribution of growth • High value sectors currently clustered in a small number of locations • Widening productivity gap between East Kent and wider region since the recession reflecting drop in recent investment • Uneven qualification attainment levels and below regional average in all areas except Canterbury • Housing affordability issues particularly in Canterbury and Ashford • Pockets of socio-economic deprivation, particularly in some coastal communities • Congestion issues on some parts of the strategic infrastructure network, including Operation Stack
Opportunities	Threats
<ul style="list-style-type: none"> • Representation across multiple growth sectors, and access to range of economic assets • Space to grow with significant unrealised development schemes and projects (to enable both housing and employment development) • Councils taking a proactive approach to making land available for development • Capacity to grow usage of High Speed 1 and to increase service provision • Forecast population, employment and economic output growth • Increasing demographic and socio-economic diversity, including more young people, families and share of working-age population • Potential to retain a greater share of high-skilled out-commuters and graduates from HE institutions to generate more business start-ups • Regenerating East Kent’s town centres to boost resident and business attractiveness • Increased joint working between East Kent local authorities could lead to greater capacity and capability to coordinate investment and economic development policy 	<ul style="list-style-type: none"> • Higher recent economic growth in Ashford and Canterbury (compared to other areas in East Kent) expected to continue • Cross-county infrastructure constraints impacting ability to deliver strategic housing and employment growth • Lack of infrastructure investment could limit economic growth potential of East Kent and wider UK economy • Limited housing market choices outside of Ashford and Canterbury • Under-performance of town centres and need to support long-term regeneration • Losses of employment space, and lower land values and viability issues constraining new commercial development particularly in Dover, Shepway and Thanet • Lack of comprehensive improvements to the M2/A2 route from the planned Lower Thames Crossing to the Port of Dover • Lack of long-term solution to address lorry parking issues associated with Operation Stack • Future customs arrangements following Brexit currently unknown but may adversely impact functioning of Port of Dover and Channel Tunnel • Impact of Brexit on the flow of people and trade across the Channel

Source: Lichfields analysis

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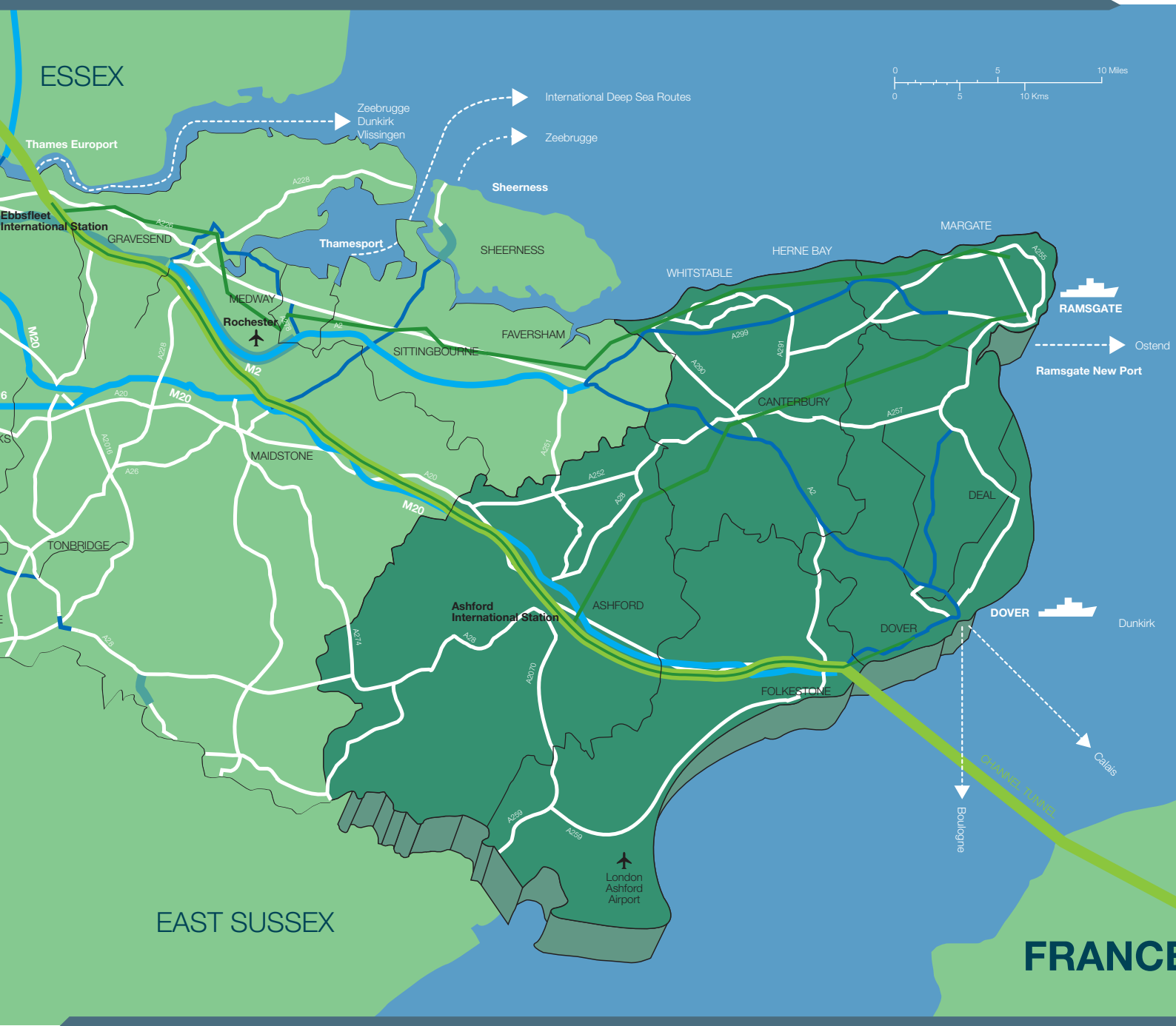
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East Kent - The Gateway to UK plc



Foreword

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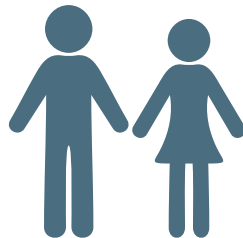
40% of UK trade to Europe goes through the Channel Tunnel and ports of Dover and Ramsgate in East Kent.



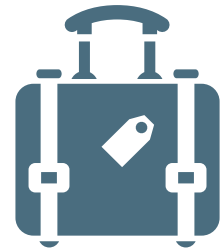
East Kent generates £11.9 billion to the UK economy (2016).



East Kent's two largest universities together - output of £900 million (2014), employ 7,800 people, attract almost £32,000 HE students.



95,599 people of working age = 42% of those in Kent, 16% in SE LEP area, 1% in GB.



HS1 - 10million passengers each year.



Channel Tunnel - has average of 57,000 passengers per day; since opening has had 25 million trucks, transported more than 320 million tonnes of freight goods and seen 390 million passengers using its services.



238,000 total employment = 38% of total employment in Kent, 15% in SELEP area, 1% in GB.



£510 million tourism-related spend (2015).

About East Kent

- East Kent provides the largest single access to the country [stats to be used to convey scale]
- We play a critical role in the overall prosperity of the UK offering direct access to X [number of destinations]
- The return on investing in East Kent will help UK plc to prosper and help us to fulfil our ambitions for growth and bring economic prosperity.
- We are a significant economic sub-region (generating £11.9 billion to the UK economy (2016)) offering unrivalled potential for and an aspiration for growth
 - We have distinct characteristics that support our potential for growth
 - a rapidly-expanding base of high growth sector
 - proximity to London and mainland Europe
 - excellent international connectivity
 - world-class education institutions
 - incredible quality of life assets in beautiful coastal and rural settings

Why Invest in East Kent

- Growth will be achieved through targeted investment in four key objectives:
 - 1. Unlocking growth through infrastructure** - a need for sites for development, an effective transport and digital infrastructure and targeted upgrading of our road and rail networks (particularly High Speed 1) to enhance domestic and international connectivity.
 - 2. Delivery of business space** – high quality flexible modern commercial space is needed in the right locations to support our existing businesses while attracting new investors.
 - 3. Supporting skills and productivity** – creating an environment for innovation in productivity and the creation of talent will strengthen us further.
 - 4. Place making and shaping** – investment will make East Kent a location of first choice that retains and attracts young people, families and entrepreneurs, while at the same time maximising the potential of the natural assets we hold, enhancing our town centres and ensuring a high quality built environment.

- Our investment plans are in line with the Government's own National Infrastructure Commission report which prioritises the three Cs – Congestion, Capacity and Carbon (launched on 13th October 2017).
- Our proposed investments aim to capitalise further benefits arising from HS1 and the proposed Lower Thames Crossing, with positive impact on the rest of the country including the Midlands Engine and the Northern Powerhouse, and to realise appropriate solutions to Operation Stack and the impacts of Brexit
- We have a strong track record of the East Kent local authorities working together to plan for and execute investment

Our Investment Priorities

- Our four critical East Kent nationally significant investment priorities are:
 - **Strategic network improvements to A2/M2** - required to support the new Lower Thames Crossing, the growth of Canterbury and the ports of Dover and Ramsgate;
 - **M20/A20 improvements** - including junction 10A, the proposed lorry holding area, HGV overnight parking and access to Dover;
 - **Improvements to rail capacity, speeds, frequency and associated infrastructure** - including Ashford SPURS, Westenhanger Station enhancement, and Thanet Parkway; and
 - **A28 corridor artery** – stretching across East Kent from Margate in Thanet to Ashford via the City of Canterbury this includes eight separate but connected transport infrastructure projects to improve road links, address bottlenecks and ease problems of congestion.
- Our East Kent Economic Growth Framework sets further specific investment priorities to achieve long-term economic growth across East Kent and have the capacity to deliver 86,300 new dwellings and 47,400 jobs in East Kent over the next 10 years.



East Kent is home to:

HS1 – the only High Speed rail service to Europe providing direct links to 11 major european cities

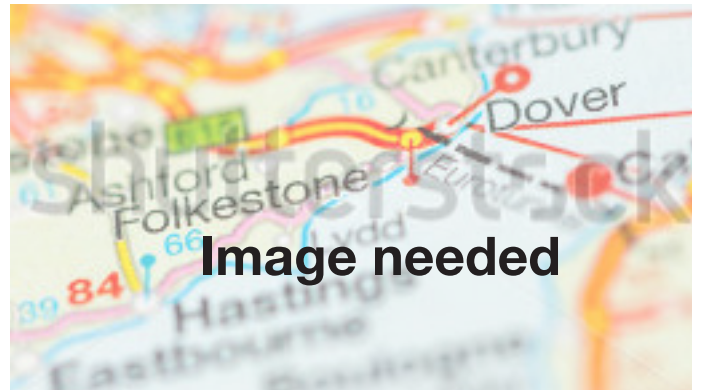
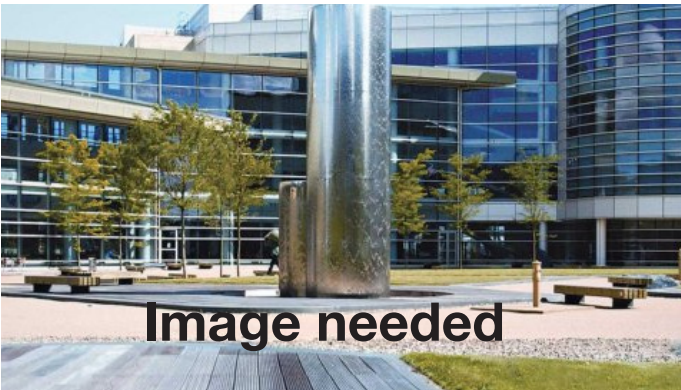


An Enterprise Zone at Discovery Park

Major employers including P&O, Saga, Premier Foods, Coty Rimmel, Cummins Power, Bretts, Vattenfall, Wahl and EDF



21 miles away from France



76.5 miles of stunning accessible coastline



Contact us:

- Ashford Borough Council: ??????
- Canterbury City Council: ?????
- Dover District Council: ?????
- Shepway District Council: ?????
- Thanet District Council: ?????