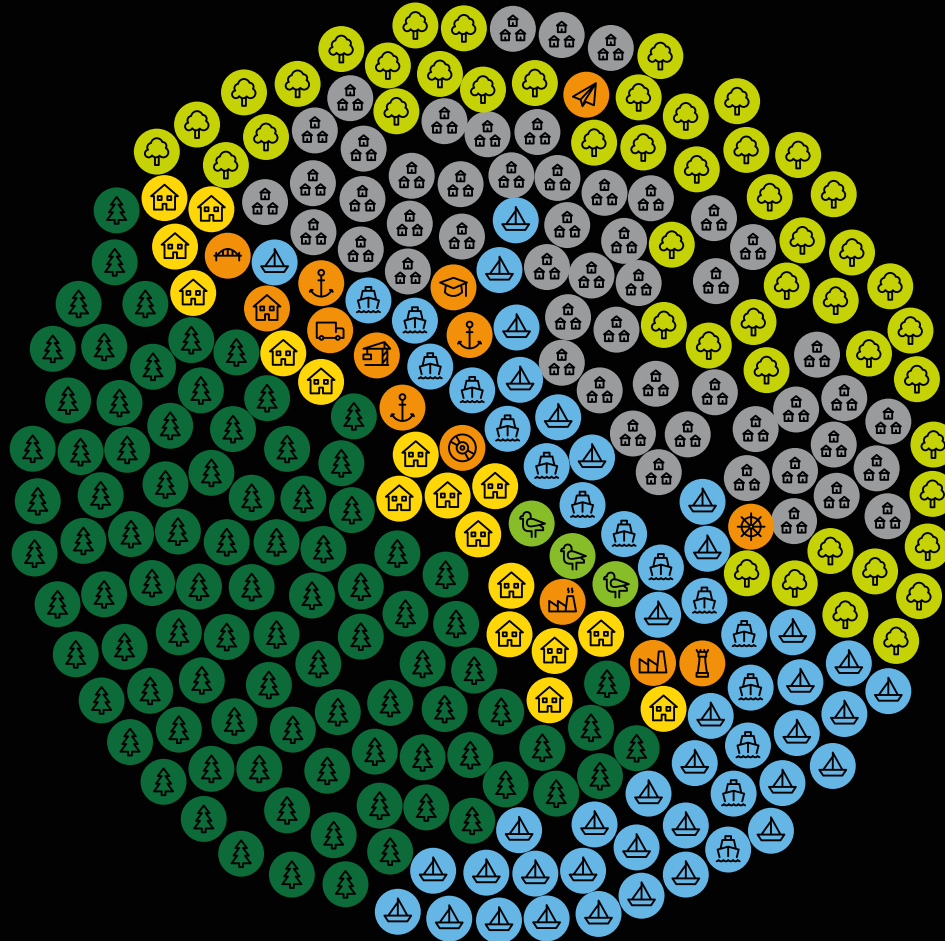




HILLBREAK

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Town Planning and Urban Design



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**THE WATERSIDE** Economic Prospectus  
Executive Summary  
**A vision for a world-class maritime economy  
in a world-class natural environment**

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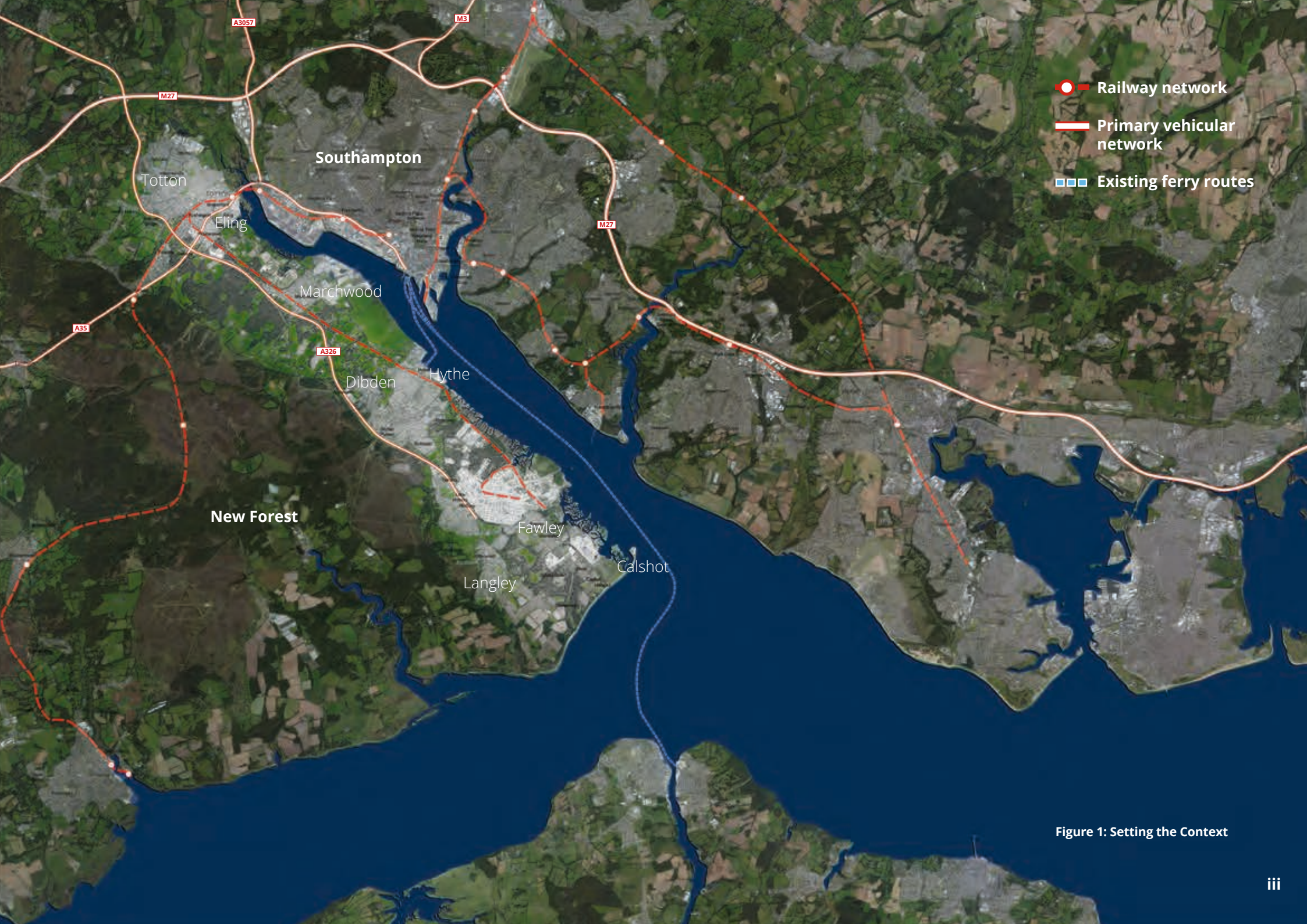
# Executive Summary

1. This Prospectus conveys the national significance and compelling local benefits of harnessing the full potential for maritime and port development, community renewal and environmental enhancement on the Western shores of Southampton Water.
2. Its audience includes all stakeholders with an interest in the economic success and environment of the Waterside, and the health and prosperity of its communities, including local residents and communities, local government, national environmental agencies with responsibility for the Waterside and the Local Enterprise Partnerships. In particular, the Prospectus seeks the attention of central Government, without whose support the economic, social and environmental opportunities that this report identifies will be lost.
3. The Prospectus urges local government to convene and lead the input of a range of stakeholders. These should include representatives of key industries, the major landowners, the Local Economic Partnerships, the Universities, academies and colleges, as well as government departments, all of whom are invited to respond in partnership to the challenge by developing the necessary strategic frameworks and capacity to ensure this nationally-significant opportunity is realised and that all residents are able to share in the benefits of success.

## A national imperative

4. The Waterside – an area along the west coast of Southampton Water, from Totton to Calshot – has the unique potential in the UK to play host to and drive the growth of a world-class marine and maritime economy at the heart of a world-class environment, framed by the iconic landscape of the New Forest and the dynamic coastline of the Solent.
5. The Waterside is home to an extraordinary portfolio of internationally significant assets and infrastructure critical to the competitiveness of the UK, but its full potential to underpin the wider sub-regional and national economy is not being realised. In fact, in employment, resident population, school enrolment, mobility and housing terms, the Waterside is in decline. There are also significant pressures affecting the natural environment.
6. Paradoxically, the Waterside's rich vein of natural and commercial assets are internationally recognised and important. These include, crucially, the Port of Southampton and the New Forest National Park. Together, these assets underpin a unique opportunity to deliver an innovative and transformative investment programme, funded by the public and private sectors, to create thousands of jobs and reverse the fortunes of declining communities.
7. There is a unique opportunity here; an opportunity which, if grasped by central Government and local partners working together, could have a profound effect on the UK's international trading and industrial prospects as it prepares to leave the European Union. The effective and timely delivery of this here-and-now opportunity should, therefore, be a national priority and firmly embedded in the Government's Industrial Strategy and 25 Year Environment Plan. This potential will only be realised if partners work together to drive identified priorities to ensure the effective delivery of the vision.





- Railway network
- Primary vehicular network
- Existing ferry routes

Figure 1: Setting the Context

## A shared vision for a unique place

8. The scale, importance and urgency of this opportunity has inspired Associated British Ports, Barker-Mills Estates, Fawley Waterside Limited and Solent Gateway Limited, owners of crucial assets within the Waterfront, to come together with ExxonMobil, New Forest District Council, the New Forest National Park Authority and Hampshire County Council to develop a shared vision for the Waterside.
9. With effective partnerships and strong leadership to prioritise action, attract investment, and orchestrate stewardship, the responsible economic growth of the Waterside would be of significant benefit to the nation and residents living locally. It would make a major contribution to the Government's long-term Maritime 2050 ambition by helping to make the UK the best place in the world to conduct maritime business.
10. For this to happen, central Government needs to play a full and collaborative role and is urged to do so.

## Challenges and opportunities

11. At the heart of the area is the Port of Southampton – a national success story. The Port is the UK's largest for exports and a global leader in the cruise liner market. The ability of the UK to lead and compete in international markets depends on fast and reliable trading and leisure access, especially in a post-BREXIT context. Increased Port capacity must be at the heart of this strategy.
12. The Port sits alongside and is complemented by research excellence and educational platforms provided by the Universities and a growing and diversified business base. This includes a world-class marine sector anchored by the National Oceanography Centre, the National Maritime Agency, Lloyds Register and an array of advanced design and engineering capabilities.
13. The combination of:
  - a) the marine economy,
  - b) digital technology,
  - c) world class businesses and institutions,
  - d) opportunities to deliver sustainable new communities embracing smart city innovation, and
  - e) the world-class natural environmental context provided by the New Forest National Park and the Solent, provide the essential pillars for future growth and prosperity, and a healthy, biodiverse and well-managed environment.



## Delivering new infrastructure

14. While some developments are likely to happen without strategic intervention, the full extent of the transformative impacts on offer are likely to be lost unless the expansion of the Port at Dibden, the regeneration of Fawley Power Station and the other opportunities identified in the Prospectus are planned in a co-ordinated way. Community priorities, new infrastructure provision and quality of design and execution must all be embedded in decision taking.
15. Investment in local and sub-regional infrastructure has not kept pace with demand. The only main road – the A326 – routinely experiences high levels of congestion. Wider mobility options are impeded by a lack of investment in rail, bus and water-based transport. The peninsular nature of the urban and economic geography means that any future development will require significant investment in local transport in order to deliver a comprehensive and modern mobility system.
16. There is a need for the area to significantly improve its access to available public resources; this is not only about transport, but also the requirements to sustain the essential infrastructure associated with growth – environmental stewardship, housing, education, and health.

## Responsible growth

17. An important bedrock of employment and productivity is the quality of premises necessary to support local businesses. Notably:
  - a) The marine refit and refurbishment industry for commercial ships and recreation craft, which often involves specialist technology in advanced composite materials alongside traditional ship-building skills, is constrained by a lack of available and affordable facilities, such as boat yards and workshops, dry docks and boat lifts. There is an important role for both private landowners and public bodies, to bring forward suitable, technology-enabled premises to meet the growing needs of this high-value and highly-skilled sector.
  - b) Workspace for start-ups and established businesses with full digital connectivity are essential to building a strong, vibrant business community, underpinned by exemplar approaches to placemaking and a rich mix of uses.
  - c) Quality, desirable homes for all age groups and all levels of affordability, particularly for the working age population, are just as important and in very short supply.
18. Growth can – and must – go hand-in-hand with environmental responsibility; not merely to manage the impact of development on valued landscapes and habitats, but through which lasting environmental gains are realised which enhance the investment appeal and resilience of the area.
19. A progressive approach which is complementary to enriching the cultural value and amenity of heritage assets is not only supportive of appropriate development, but positively improves the long-term sustainability of those assets and their widest accessibility to the public.

# A Remarkable Portfolio of **Opportunities**

## Movement



Southern Rail link to Heathrow



Short and long term improvements to the A326



Reopen Fawley branch line and improve rail connections



Bus infrastructure improvements



Ferries and water transport potential



Improving pedestrian experience



Creating a fit for purpose cycle network

## Digital Economy & Skills



Smart Technology



Intelligent Merchant City



5G and digital community



R&D and Enterprise Centre of Excellence



Smart Port



Tailoring skills to employment



Apprenticeships



Encouraging collaboration with business

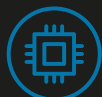


Opportunities with leading technology and marine industries

## Employment



Business and industry



Marine manufacture and advanced composites



Port and logistics



Research and development



Marine services



Leisure and sustainable tourism



Building technology clusters

## Housing



Improving existing public housing



Quality and design



New communities and village extensions



Meeting local need for housing



Increasing density in settlements



Delivering affordable housing



Housing for elderly



Deliver a housing offer that attracts young people and families

## Natural Environment



Creating habitats and biodiversity



Protecting the mudflats and marine ecology



Connecting the Forest to the sea



Improving management of the environment



Connecting public spaces



Coastal Walks



New renewable energy technologies



Local food procedures and supply chain



Zero plastic waste

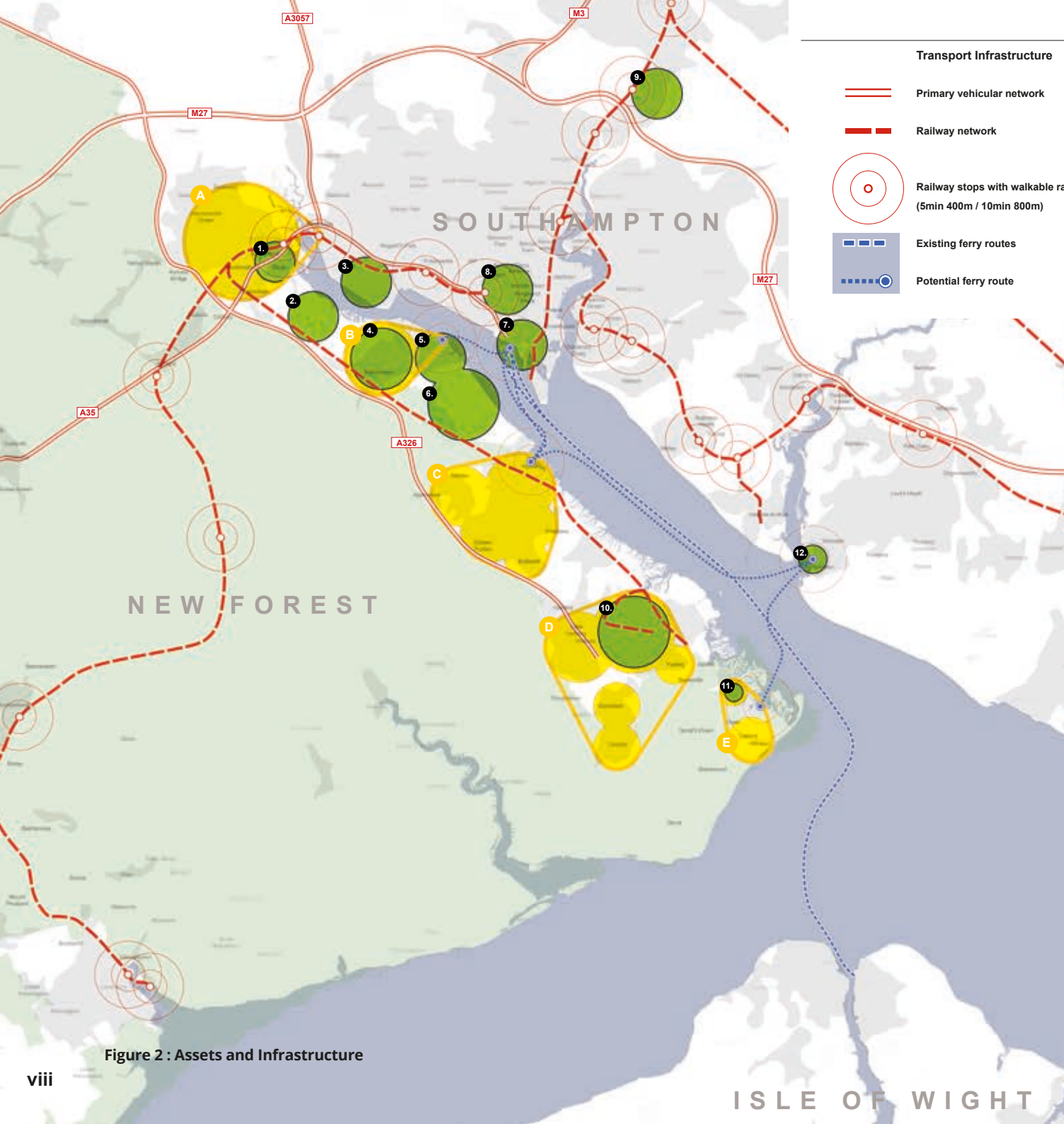


Figure 2 : Assets and Infrastructure



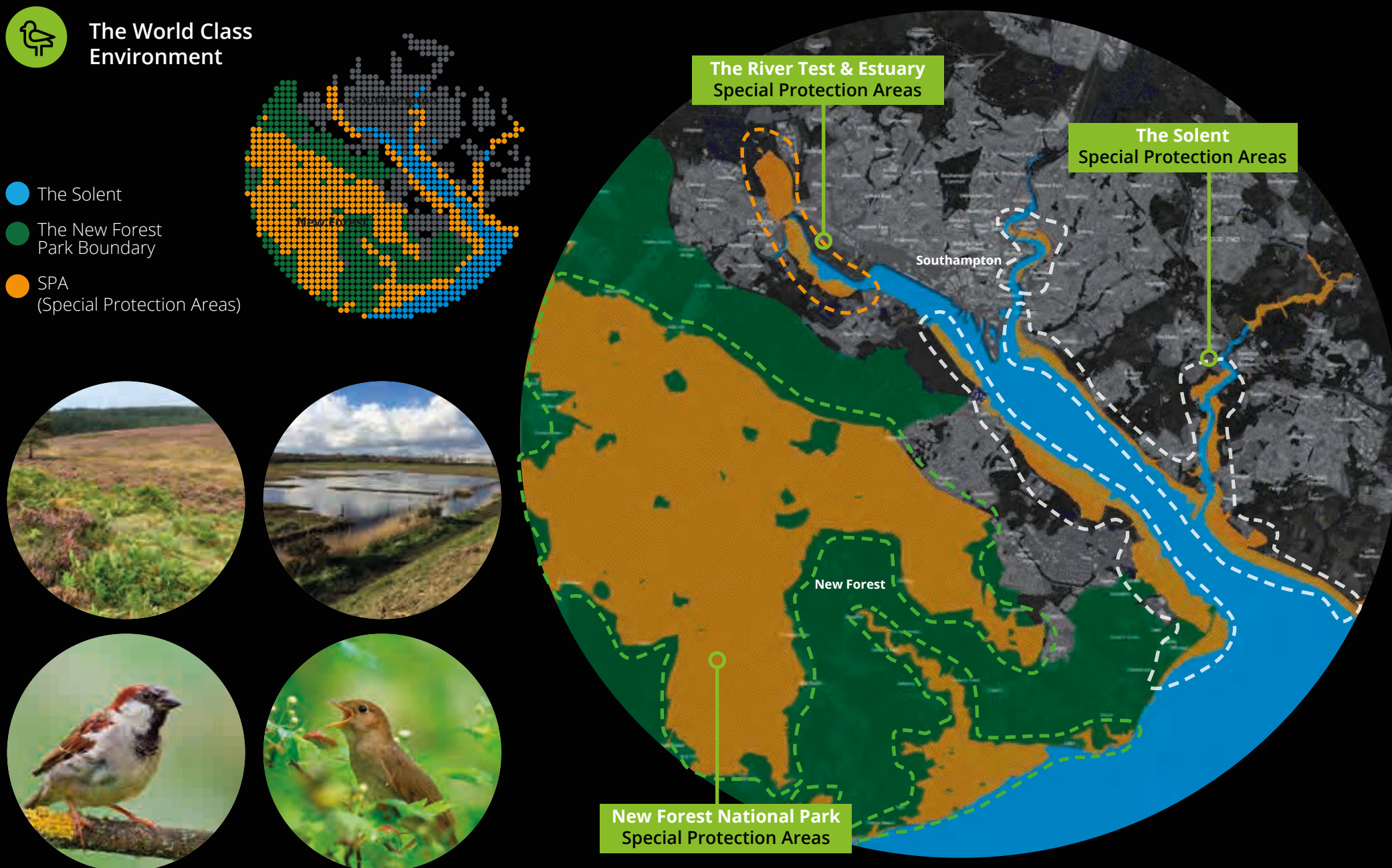


Figure 3 : Celebrating hidden assets and potential jewels

## A new Growth Strategy for the Waterside

20. The Strategy which is required must link the economy, business and people with a sharp focus on innovation and the enhancement of natural capital - one which underpins the creation of the Waterside as a world-class maritime economy in a world-class natural environment.
21. At its heart must be a premier smart Port, underpinning the continued success of the UK with international trade and marine leisure. Experience drawn from Rotterdam – the largest port in Europe, and a key trading partner and competitor with Southampton – highlights the vital role of collaboration between Port, local government, corporates and entrepreneurs, and research and education institutions.
22. There is a need to secure an explicit recognition from government that Southampton Water, and the Solent, is the place of unrivalled opportunity to create a world-class maritime and marine economy. This should be viewed as a national opportunity; one which needs to be embedded as a key priority in the Nation's Industrial Strategy.
23. The analysis in this Prospectus identifies a set of guiding principles to shape the quality and positive impacts which should be captured by the new approach advocated for the Waterside. These are:
  - a) net environmental gain which recognises the role of development in securing a positive environmental future in line with the Government's 25 Year Environment Plan and which embeds this philosophy in all the emerging development and spatial policies in the Waterside;
  - b) investing in natural capital which actively promotes the opportunity for investment in the natural assets in the area to support public health and well-being, workforce productivity, strengthened amenities and greater environmental resilience;
  - c) the importance of place and good design as a crucial contribution to local identity and community pride and to support the development of a world-class marine and maritime economy;
  - d) engaging, connecting and inspiring communities which reflects the fundamental requirement to ensure all residents can play a full and active part, not only in shaping the area, but in accessing all the benefits a successful economy generates;
  - e) building resilience and adaptive capacity which becomes embedded in policies and proposals to adapt to the growing impacts of climate change;
  - f) circular economics and radical resource efficiency which promotes a systems-wide approach to waste elimination and productivity;
  - g) planning for total mobility alongside greater connectivity;
  - h) embracing technology as it affects places, businesses and people; and
  - i) celebrating hidden heritage and potential jewels as part of a wider enhancement of the ecological and cultural network.
24. A Growth Strategy based upon these principles would would in effect be the sub-regional response to the National Industrial Strategy. It would address effectively the Waterside's huge potential and help meet a number of Government priorities for growing the UK's industrial and technology base, promoting clean growth and environmental renewal, and delivering national planning policy priorities, such as delivering new homes.
25. The Waterside would on this basis become a beacon of best practice, maximising the area's capacity to access public resources, including financial investment.

## A new approach to partnership

26. A “business-as-usual” approach will not deliver quickly or effectively all that is required. New partnership arrangements are required to provide the necessary senior leadership to oversee all the tasks which need to be performed.
27. This must extend to all the public and business-led bodies who are involved, as well as key landowners. This structure need not change the statutory responsibility of any individual body, but it would provide a new platform for aligning priorities and resources, particularly in infrastructure and stewardship of the environment. This will be the key to creating the unifying vision and to delivery.
28. The Prospectus requires local leadership in government and the business community to grasp the opportunity, including by preparing a Growth Strategy as a platform for building a world-class marine and digital economy, new sustainable communities, at the same time as delivering net environmental gains.
29. The growth must be linked to the most vulnerable communities in the area, to ensure that inequalities do not increase, placing continuing demands on scarce public resources.
30. The leadership structure should ensure full engagement with all stakeholders – although not all of them can be represented on the leadership group.
31. There must be a focus on clear priorities, championing the vision far-and-wide, taking responsibility for the production of the Growth Strategy and the region’s input to the National Industrial Strategy.
32. This will be the essential framework for significant new infrastructure and developments to be realised and co-ordinated and in ways which maximise the benefits for the area and the people who live within it.

## Next Steps

21. The analysis identifies key priority actions;
  - a) Creation of a new Partnership structure – to champion the Vision and ensure that any action recommended is progressed in a timely and effective way. Elected members and community leaders, businesses, colleges, Universities and environmental agencies should all play an active role. They should articulate the essence of the strategy throughout Government and in the global marketplace. One of the early tests of the effectiveness of partnership efforts will be how quickly Government can be encouraged to become an active partner itself.
  - b) Prepare a Responsible Growth Strategy & Strategic Regeneration Framework - this should present a comprehensive, co-ordinated and ambitious direction for promoting balanced economic growth in the Waterside alongside the enhancement of the environment. It would be the spatial analysis which co-ordinates the key development proposals including the Port, the planning and development relationships between them and the wider area, including critical transport infrastructure and community priorities generally. It needs to be based upon the latest data, the role of the Port in driving the wider economy, and a detailed awareness of business, resident and community aspirations. It should address new housing and improving existing housing conditions, and the development of education, training and public services to ensure that no-one locally is excluded or left behind. It should demand high-quality design to create a world-class built environment in a world-class natural environment.
  - c) Build the business case for investment in a bold mobility strategy – to ensure that the scale of change over the next 10 to 20 years arising from the opportunities presented in this Prospectus are factored into infrastructure planning now, including reopening the Fawley branch line to passengers, connecting to the Heathrow Southern Railway link, and bringing forward smart water-based transport solutions.
34. The Commissioning Group invites leaders of local government and representatives of the local community, and the Local Enterprise Partnerships, to put in place these partnership structures quickly.

## Planning for responsible growth

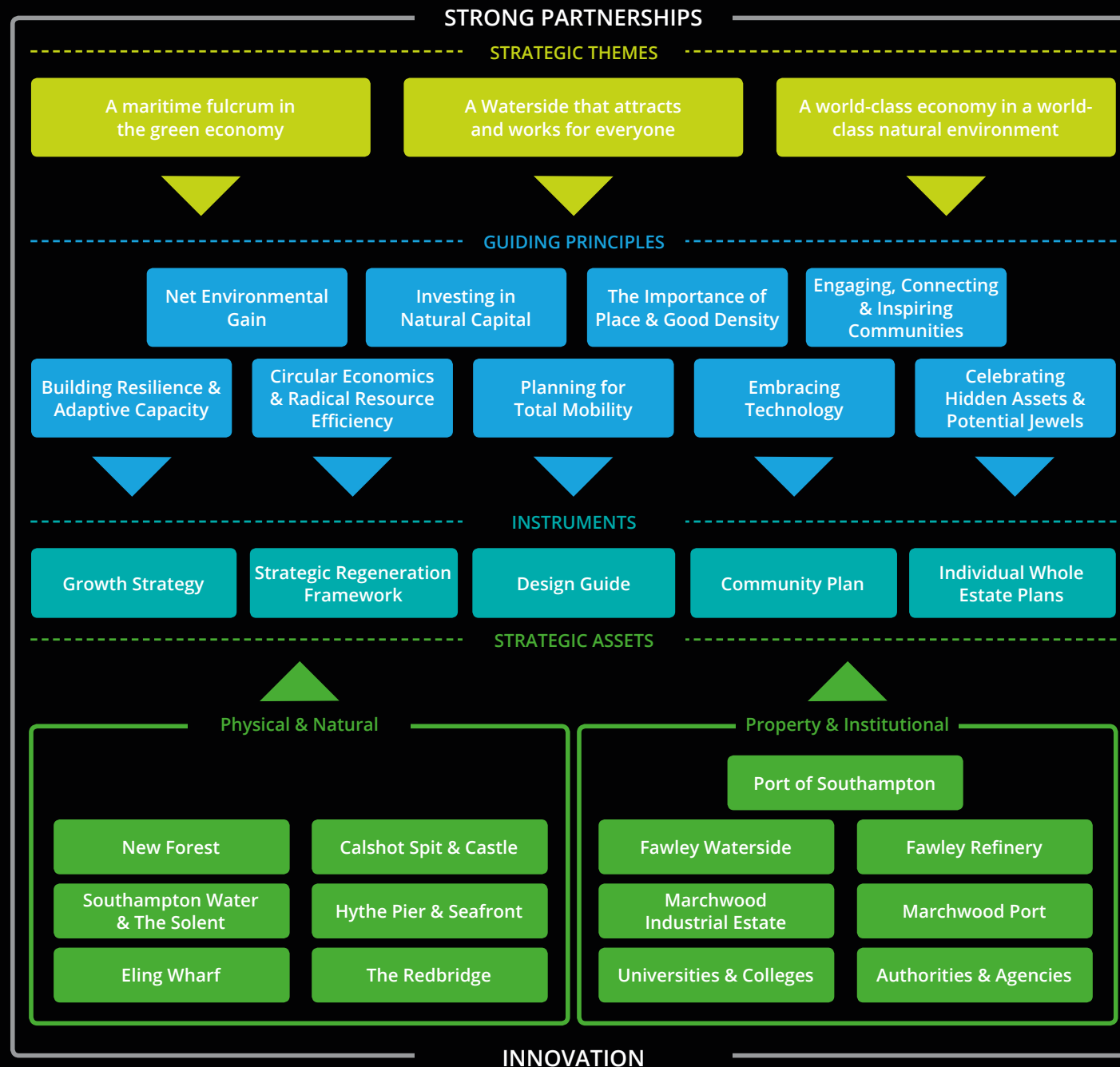


Figure 4 : Strategic Themes





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