SOLENT
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Maritime Futures: Solent Waterfront Sites

Final Report

September 2015






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Revision Schedule

Rev	Date	Details	Prepared by	Reviewed by	Approved by
1	13 May 2015	Draft Report: Overview of Supply and Waterfront Waterfront Sites Register	Simon Thurley Gregory Openshaw	Gregory Openshaw Project Manager	Gregory Openshaw Project Manager
2	27 May 2015	Draft Report	Simon Thurley Gregory Openshaw	Gregory Openshaw Project Manager	Gregory Openshaw Project Manager
3	03 June 2015	Draft Final Report	Simon Thurley Gregory Openshaw	Gregory Openshaw Project Manager	Gregory Openshaw Project Manager
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Conflict of Interest

We are aware of one waterfront site in the study area for which AECOM is providing technical inputs to a planning application. To ensure that research on this report (Key Waterfront Employment Sites in the Solent) and technical work to the planning application was undertaken objectively, the teams working on the two projects comprised different consultants, were led by different office locations and had no interaction or exchanged information regarding their research.

Front Cover

Griffon Hoverwork, Itchen East Bank Southampton, Site 49.

CONTENTS

ABBREVIATIONS

ABP	Associated British Ports
CD	Chart Datum
ELR	Employment Land Review
HCC	Hampshire County Council
IOW	Isle of Wight
LEP	Local Enterprise Partnership
LAT	Lowest Astronomical Tide
LP	Local Plan
MM	Marine and Maritime
MOD	Ministry if Defence
NOC	National Oceanographic Centre
PUSH	Partnership for Urban South Hampshire
RAMSAR	Wetlands of international importance
SLEP	Solent LEP
SCA	Special Area of Conservation
SINC	Site of Importance for Nature Conservation
SPA	Special Protection Area
SSSI	Site of Special Scientific Interest

1 INTRODUCTION

1.1 Study Context

1.1.1 AECOM Infrastructure and Environment UK Limited (AECOM) was commissioned by the Solent Local Enterprise Partnership (LEP) to develop an evidence base of key waterfront employment sites in the Solent region to inform planning policy decision making on waterfront site retention.

1.1.2 The Solent LEP is the key interface and lead for economic development in the Solent. The LEP has a strategy to deliver transformational economic growth within the Solent region as set out in its Strategic Economic Plan (SEP), published in 2014. The SEP aims to focus investment on those parts of the economy that need to develop or change the most to accelerate growth and identifies the marine and maritime sector (including defence and advanced manufacturing) as a key economic strength, around which the strategy for growth is built.

1.1.3 This research aims to support the aspirations of the SEP. It builds on work undertaken previously notably the Transforming Solent – Marine & Maritime Supplement (2014)[1] and the Solent Waterfront Strategy (2007)[2], both of which highlighted the importance of the marine and maritime sector to the Solent and the need for a thorough review of the provision of waterfront sites and understanding of their characteristics and assets.

1.1.4 The need for a better understanding of the Solent area's waterfront assets, as part of an evidence base to support policy making on site retention, is echoed in concerns being raised by the marine and maritime business community and some policy makers that land suitable for marine industries is being lost to alternative uses such as residential.[3]

1.1.5 The loss of land at strategic waterfront locations reduces the Solent area's ability to provide the right sites and cater for demand from the marine and maritime sector which is currently growing. Without a Solent-wide up to date assessment of supply and a long term perspective of demand, sites may continue to be lost as the viability of residential prices out industry, and local planning authorities lack the evidence base to counter applications for change of use. This study on supply has therefore implications for supporting employment retention and growth in the marine and maritime sector, competitiveness and securing inward investment to the Solent area.

1.2 Objectives and Outputs

1.2.1 Following from the above, the objectives of this study are to identify:

1. The strategic waterfront employment sites in the Solent LEP region that support (or are designated to support) marine-manufacturing, defence, port-related or leisure marine uses; and

[1] Transforming Solent, Marine and Maritime Supplement (Rear Admiral Rob Stevens, CB; March 2014)
[2] Solent Waterfront Strategy, Volume One Report (Adams Hendry Consulting Ltd, WS Atkins & Marina Projects Ltd; December 2007)
[3] Analysis of recent planning permissions data indicates that within the last six years approximately 0.5ha of waterfront B-use employment land has been lost to residential uses. In addition there a number of larger waterfront sites where residential development has either come forwards or is proposed, to enable the redevelopment of employment sites. Examples include Centenary Quay and Chapel Riverside in Southampton, Medina Yard in Isle of Wight and Trafalgar Wharf in Portsmouth.

2. The underlying rationale for:
    - Why at a macro level, the retention of marine employment waterfront access sites are vital for the prosperity of the sector and the wider economy of the region; and
    - Why the retention of each individual site is advantageous to the local economy.

1.2.2 The focus of this research is on identifying and collecting information on the supply conditions of waterfront sites across the Solent sub-region. A Waterfront Sites Register, in Excel format, has also been produced and provides details on the individual site characteristics of all waterfront sites. The Waterfront Sites Register details the following:

- Site name, address and location (including cluster location)
- Existing site characteristics, taking account of land use, site and premises quality, and presence of on-site assets of relevance to the marine and maritime sector
- Strategic access, via road or rail
- Navigational access, including details on water depth, site water frontage and access to water at all states of tide
- Development prospects based on land and buildings which are currently not in use, opportunities for intensification and investment requirements
- Site allocations and employment policy designations
- Flood risk and environmental designations; and
- Indicative estimate of the current employment supported by the site.

1.2.3 Captured at a site level, the Waterfront Sites Register allows for assessments to be made at sites level and sub-regional level.

1.2.4 Providing a sub-regional / cross-council overview of provision is of relevance and interest to all local authorities which fall within the study area, as well as those involved in sub-regional spatial strategy and economic development, such as the Partnership for Urban South Hampshire (PUSH). The evidence present in the register will provide local authorities and policy makers with a greater understanding of which waterfront employment sites are important to sustaining the marine and maritime sector and which sites could support growth. As such it could be used to support councils thinking on employment land policy and spatial strategy; as a basis for monitoring the provision of waterfront sites; and respond to inward investment queries or be used in marketing sites. The information could also be used to guide Solent LEP and partners on where capital investment could be focused to unlock sites for development and maximise economic benefits.

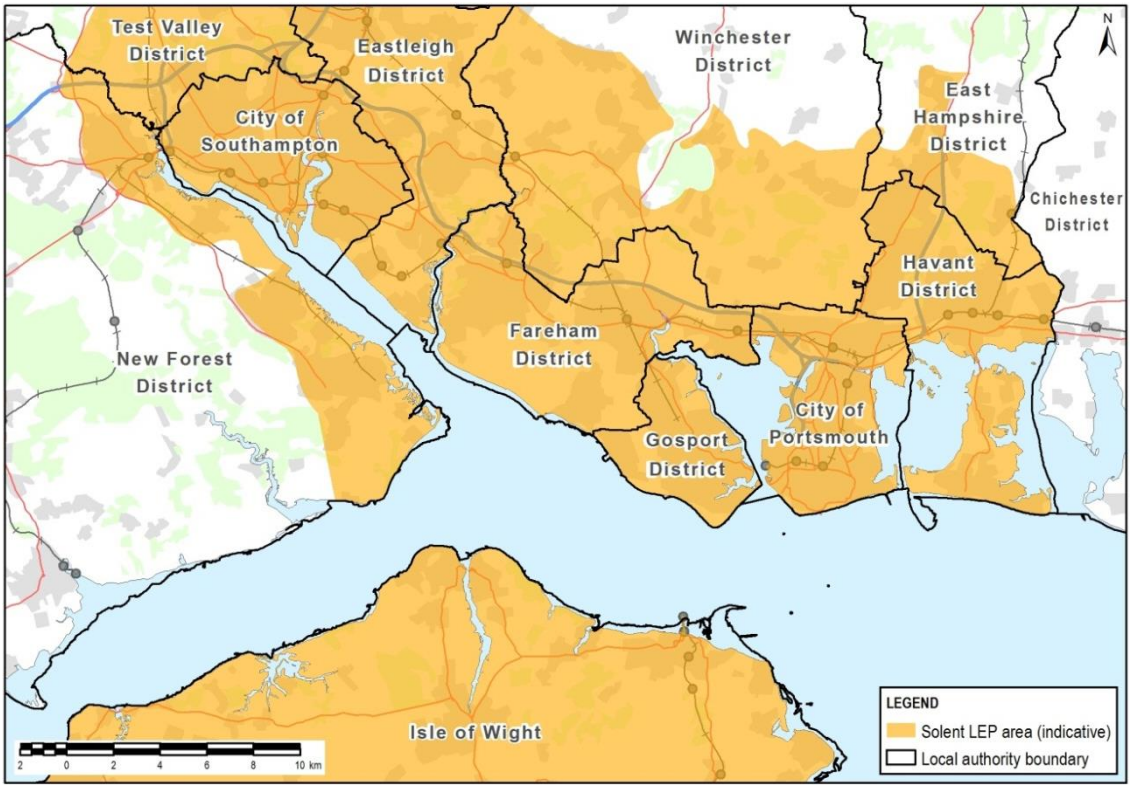
1.2.5 It is suggested that the Waterfront Sites Register could function as a live document held by Solent LEP / partners and updated as site conditions change. Information on changes to site conditions could be provided by planning authorities of the LEP area, as planning permissions are granted / implemented, and/or in conjunction with publication of annual monitoring reports.

1.3 Scope of the Study

Study Area

1.3.1 The study area, as illustrated in **Figure 1.1**, comprises all of Portsmouth, Gosport, Fareham, Isle of Wight and Southampton local authorities and part of Havant, East Hampshire, Winchester, Eastleigh, Test Valley and New Forest authority boundaries as well as Hampshire County Council. Focussed on the provision of waterfront employment land, the study area is limited to those areas which have direct water frontage and therefore does not include sites located in Test Valley, Winchester and East Hampshire. **Section 2** includes further details on the scoping of sites for assessment.

Figure 1.1: Study Area



Source: AECOM. Note: This figure reflects the study area not the full extent of the Solent LEP area.

Marine and Maritime Sector

1.3.2 The marine and maritime sector is complex to define. Broadly however, it can be seen to comprise activities associated with component manufacturing, ports, defence, leisure, ship and boat building and research across a product or service cycle. The sector is changing rapidly with technological advancements opening up new business lines and markets, as testified by the growth in marine autonomous vehicles, the offshore renewable energy sector and robotic systems.

1.3.3 The provision of suitable land, accommodation and business support systems within locations have long been recognised as a driver of competitive economic advantage. This is seen in the Solent area, which has a high representation of marine and maritime businesses co-locating, some of which are highly specialised and of international renown. Many of these businesses are interlinked through the business supply chain, with smaller firms providing specific products and services support to larger ones.

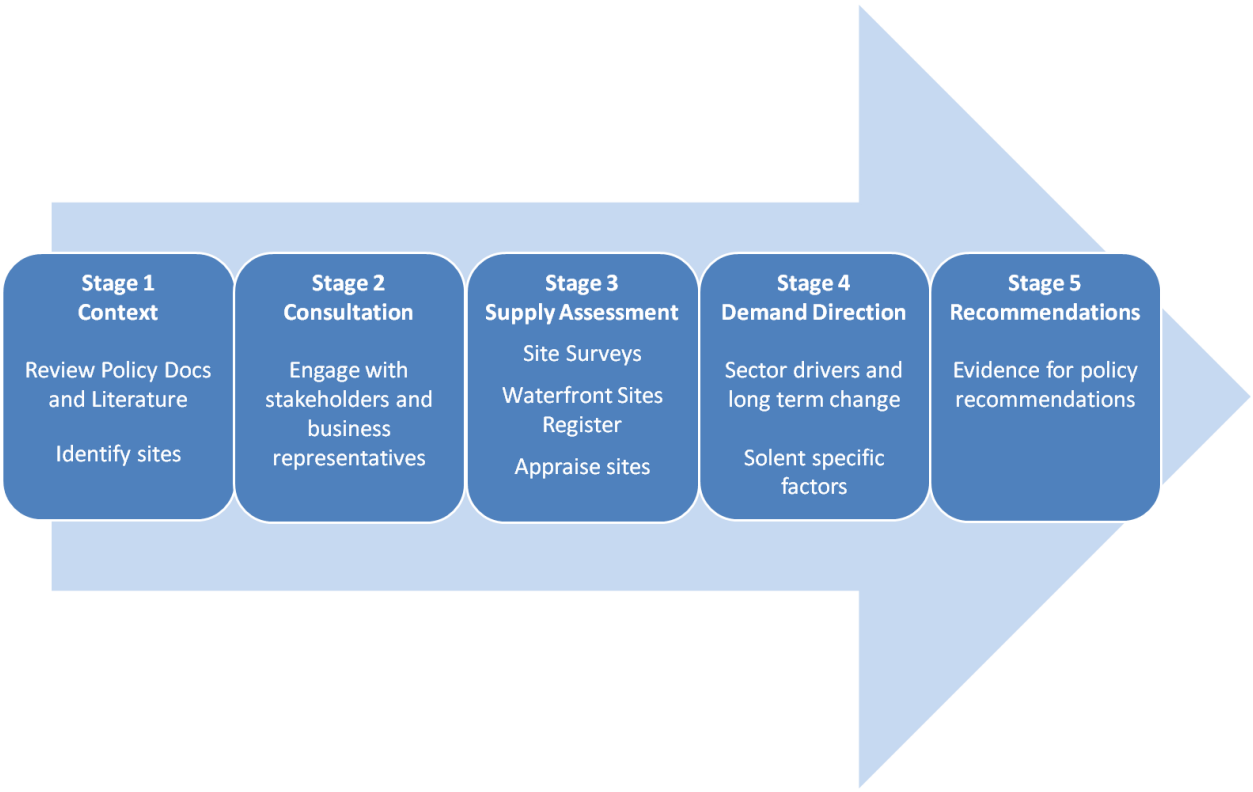
Waterfront Sites

1.3.4 This study identifies key waterfront employment sites within the study area which currently support the marine and maritime sector, as well as identifying those which are utilised by other employment uses but which have the potential to accommodate marine and maritime activities[4]. It is important to note that not all marine and maritime activities require waterfront locations and some land-locked sites play an important role in supporting both the MM sector and its associated supply chain. It is not however, within the scope of this study to identify those sites and the focus of this report will be on identifying employment sites with direct water frontage and assessing their characteristics.

1.4 Study Approach

1.4.1 **Figure 1.2** below provides an overview of our approach to this study. Cutting across each stage of our approach is a focus on understanding how the marine and maritime sector currently functions, the future needs of its businesses and opportunities and constraints on growth. As well as mapping the provision and characteristics of sites, an appreciation of current and future demand for waterfront sites over the long term has been sought, which has informed our understanding of supply requirements by MM businesses in terms of scale, location and quality/assets. Our assessment findings and conclusions have then fed into our justification for regional planning policy site retention, release and/or investment.

Figure 1.2: Approach Overview



1.4.2 Where possible this study has drawn upon recent evidence based research commissioned by councils to inform the Waterfront Sites Register. Information on site characteristics has been

[4] As such sites primarily used for non-employment uses such as education, for instance Warsash Maritime Academy, have not been reviewed in this assessment.

derived from a combination of sources including planning policy and local environmental designations from local authorities provided as GIS layers. This information has been provided by all of the local authorities within the Solent area with the exception of Havant borough council. Desk-based research on site characteristics was checked and supplemented by visits to the waterfront sites. For each site, a site survey proforma and map was used to ensure standard and consistent recording of information. The majority of sites identified in the Waterfront Sites Register were visited; however a number of secure sites for which access was not possible, such as HMNB Portsmouth, were not accessed. Where site surveys were not possible, site characteristics were determined from desk based research and complemented by drawing upon available information, existing studies and via consultation with stakeholders operating across the Solent area.

1.4.3 Consultation has been an important aspect to this research. Consultation was held with the Solent LEP, the Solent LEP Marine and Maritime Steering Group, marine and maritime businesses operating in Solent and all the eight local authorities with waterfront sites in the study area. The opinions and views expressed by stakeholder consultees are incorporated throughout this report and in the Waterfront Sites Register.

1.5 Report Structure

1.5.1 Following this introduction the report is structured as such:

- Section 2 presents our approach to scoping and identifying waterfront sites
- Section 3 provides an overview of the key findings based on information recorded in the Waterfront Sites Register
- Section 4 categorises sites in terms of their site characteristics and their relative importance to the marine and maritime sector
- Section 5 gives a brief overview of the direction and scale of demand; and
- Section 6 concludes and presents our recommendations.

1.5.2 Accompanying this report, in Excel format, is the Waterfront Sites Register which lists all waterfront employment sites presented in this report and their characteristics

2 IDENTIFYING WATERFRONT SITES

2.1 Introduction

2.1.1 This section describes our approach to identifying waterfront employment sites within the study area. It outlines our methodology, the information sources drawn upon and provides a brief overview of the spatial distribution of sites and clusters across the study area.

2.2 Process of Identifying Sites

2.2.1 Our initial approach to site identification was based upon a broad understanding and appreciation of what constitutes a strategic waterfront employment site. Given the wide range of activities which defines the marine and maritime sector what constitutes a strategic site may not be immediately clear. The importance of a site is not necessarily defined by one factor, but rather a combination of factors such as site size, strategic access, marine infrastructure, on site assets, linkages to other marine and maritime activities, and the relative importance of its current operation / activities to the local or wider economy.

2.2.2 For the purposes of this study, therefore, all waterfront sites within the Solent area which are currently in active employment use and which currently support or show reasonable prospects of potentially supporting the marine and maritime sector were scoped in to search for strategic sites. This approach ensures a comprehensive picture of individual waterfront sites in the Solent area and their characteristics is built up and analysed.

2.2.3 The identification of waterfront employment sites was a desk based exercise, drawing upon existing literature including the Transforming Solent strategy (2014) and Solent Waterfront Strategy (2007). In addition, planning policy and evidence base documents including policy designations, employment land reviews, development management plan documents and site allocation documents were reviewed for each relevant local authority area of the study area. This evidence base was complemented by online mapping and aerial photography to help identify smaller employment sites (including marinas and boatyards).[5]

2.2.4 A long list of waterfront employment sites within the Solent area was then compiled and entered into a register (the Waterfront Sites Register) and each local authority within the Solent was consulted to refine the site list. Consultation with local authority planning or economic development department allowed us to check whether all relevant sites had been captured and an opportunity to collect information about sites, request documents and information, and discuss the relative importance of specific waterfront sites, site opportunities and constraints.

2.2.5 Following consultation with local authorities, a final list of waterfront employment sites to be assessed in this study was agreed with the Solent LEP.

2.3 Overview of Sites and Clusters

2.3.1 A total of 97 waterfront employment sites within the study area were identified. Broadly, sites fell within Langstone and Chichester Harbour, Portsmouth Harbour, along Southampton Water / River Test, the River Itchen, the River Hamble and the River Medina. **Figure 2.1** provides an

[5] This study has sought to align with the requirements of National Planning Policy Guidance (NPPG) regarding site identification. However, whilst the NPPG advises that the threshold for site identification should be at least 0.25ha large, this study has included smaller waterfront employment sites where considered appropriate.

overview of the spatial distribution of waterfront sites identified with inset maps **Figure 2.2**, **Figure 2.3**, **Figure 2.4**, **Figure 2.5** and **Figure 2.6** providing detail of their location.

2.3.2 Across the study areas seven clusters of sites can be identified. These clusters have relatively similar geographies. The clusters have been used to report collectively on sites and are listed in **Table 2.1** below, which sets out the number of waterfront sites identified within each cluster.

Table 2.1: Waterfront Employment Sites by Location (Cluster)

Cluster Name	Number of Waterfront Sites Identified and Assessed in this Report
Langstone and Chichester Harbour	7
Upper Portsmouth Harbour	11
Lower Portsmouth Harbour and Surrounds	16
River Hamble	12
Southampton Water / River Test	14
River Itchen	18
River Medina [1]	19
Total	97

Source: AECOM.
1. On the Isle of Wight, only employment sites along the River Medina have been scoped into this assessment. We recognise though that the ferry terminals at Ryde, Fishbourne and Yarmouth, provide important linkages to the mainland and can be considered strategically important sites for the Isle of Wight.

2.3.3 Analysis of the waterfront sites and clusters is provided in the next section, including an overview of site characteristics gathered through a process of site surveys, consultation and analysis of information held by the Solent LEP, local authorities and key stakeholders.

Figure 2.1: Waterfront Sites Identified in the Study Area

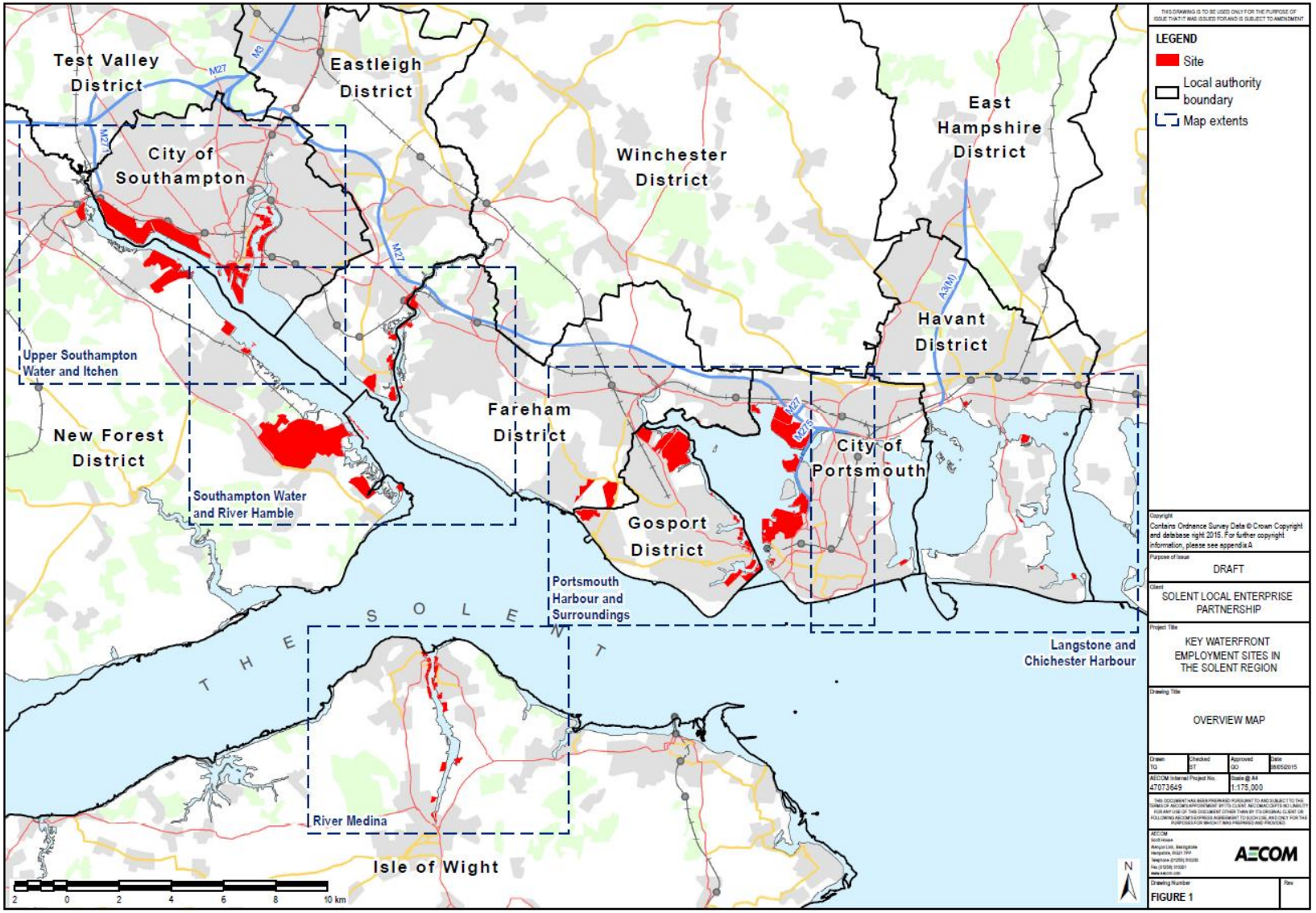


Figure 2.2: Inset Map: Waterfront Sites in Langstone Harbour and Chichester Harbour

Figure 2.3: Inset Map: Waterfront Sites in Portsmouth Harbour and Surrounding Area

Figure 2.4: Inset Map: Waterfront Sites along Southampton Water / River Test and the River Hamble

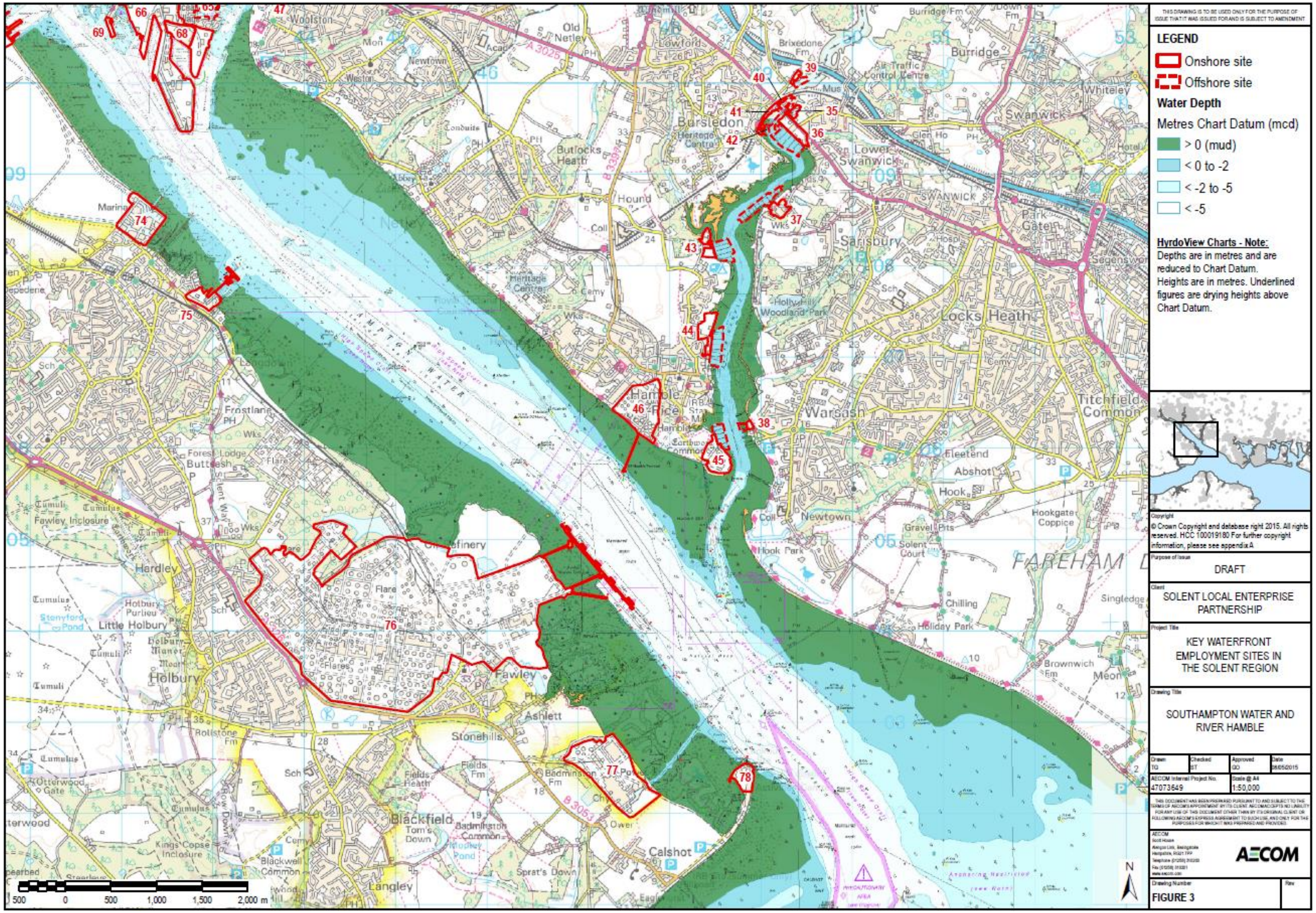


Figure 2.5: Inset Map: Waterfront Sites along Upper Southampton Water / River Test and the River Itchen

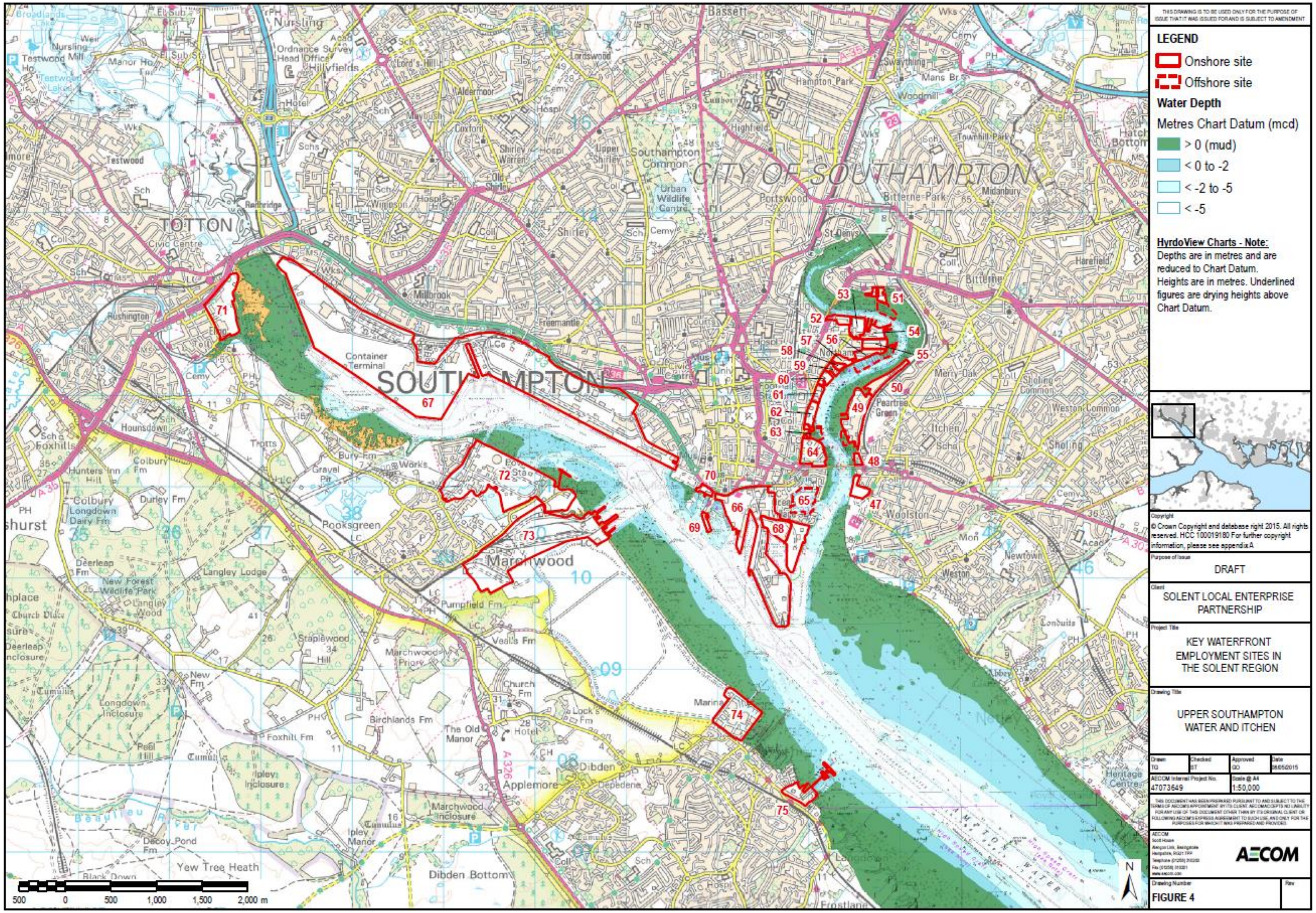


Figure 2.6: Inset Map: Waterfront Sites along the River Medina

3 ANALYSIS OF WATERFRONT SITES

3.1 Introduction

3.1.1 This section provides an overview of key waterfront employment sites identified within the study area. It draws upon site characteristics recorded throughout the site surveys, as well as information provided by stakeholders, land use and navigational mapping, online mapping and planning and environmental designation data provided by local authorities and sourced independently. Analysis has been derived from the Waterfront Site Register held in Excel format.

3.2 Overview of Waterfront Sites' Characteristics

3.2.1 As outlined in **Section 2**, the scoping of sites across the Solent identified 97 waterfront sites which are either currently in active employment use or show reasonable prospects of accommodating employment use, including businesses from the marine and maritime sector.

3.2.2 Of these 97 sites, six sites are currently occupied by the Ministry of Defence (MoD), three by utilities operators (as oil refineries and a power station), and eight currently operate as either commercial or ferry ports. Typically these 17 sites have a highly significant role to play in supporting the marine and maritime sector of the Solent and have great potential to support the sector further and as such could be considered strategic. These 17 sites have been excluded from the analysis in this chapter given their resilience to pressure from competing land uses and their limited prospect for change of land use and ownership in the short to medium term. Examples include Southampton commercial port and Portsmouth naval base.

3.2.3 In addition, a further 11 marina sites have been excluded from this chapter's overview analysis as they are predominantly provide a leisure and recreational function, and do not support other land uses such as boatyards or associated industrial activities. These marinas are often operating at full capacity, given the strong demand for leisure berths within the study area, and are considered to be more resilient to competing land pressures given their minimal land take and compatibility alongside sensitive uses such as residential.

3.2.4 The 17 MoD, utility, ferry and ports sites and 11 marinas are listed in **Table 3.1**.

3.2.5 The characteristics of all 97 sites are however captured within the Waterfront Sites Register.

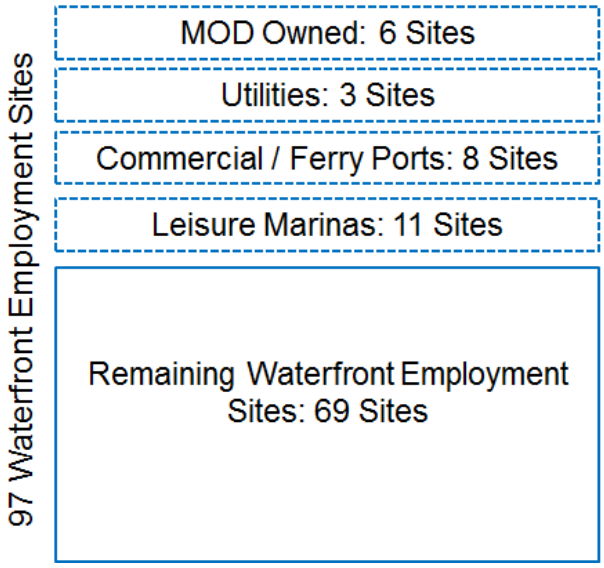
Table 3.1: Waterfront Employment Sites Excluded from Analysis

Site Name	Cluster	Use
Portsmouth Ferry Terminal	Lower Portsmouth Harbour	Ferry Terminal
HMNB Portsmouth	Lower Portsmouth Harbour	Defence Activities
Port of Portsmouth	Lower Portsmouth Harbour	Commercial Port
Haslar Marina	Lower Portsmouth Harbour	Marina
Gosport Marina	Lower Portsmouth Harbour	Marina
Royal Clarence Yard - Marina	Lower Portsmouth Harbour	Marina
Gosport Cruising Club	Lower Portsmouth Harbour	Marina
Fort Blockhouse 3	Lower Portsmouth Harbour	Defence Activities
Fort Blockhouse 1	Lower Portsmouth Harbour	Defence Activities
Horsea Island	Upper Portsmouth Harbour	Defence Activities
MOD Munitions Site	Upper Portsmouth Harbour	Defence Activities
Cabin Boatyard	River Hamble	Marina
Hamble Oil Terminal	River Hamble	Utilities
Kemps Shipyard	River Itchen	Marina
Ocean Village Marina	Southampton Water/R.Test	Marina
Port of Southampton - East Docks	Southampton Water/R.Test	Commercial Port
Port of Southampton -Western Docks	Southampton Water/R.Test	Commercial Port
Southampton Passenger Ferry Terminal	Southampton Water/R.Test	Ferry Terminal
Southampton Ferry Terminal[6]	Southampton Water/R.Test	Ferry Terminal
Marchwood Military Port	Southampton Water/R.Test	Defence Activities
Hythe Marina Village	Southampton Water/R.Test	Marina
Fawley Oil Refinery	Southampton Water/R.Test	Utilities
Former Fawley Power Station	Southampton Water/R.Test	Utilities
East Cowes Ferry Terminal	River Medina	Ferry Terminal
East Cowes Marina	River Medina	Marina
Shepherds Wharf Marina	River Medina	Marina
Cowes Yacht Haven	River Medina	Marina
West Cowes Ferry Terminal	River Medina	Ferry Terminal

[6] Not including Royal Pier. This site has been excluded because it is planned for mixed use redevelopment, primarily of residential, office, retail and leisure uses, and is not intended to be used for marine or maritime employment.

3.2.6 The following analysis therefore focuses on the remaining 69 waterfront employment sites as shown in **Figure 3.1**.

Figure 3.1: Overview of Sites for Analysis



3.2.7 The following tables present the key characteristics of the 69 waterfront sites in the study area, reported at a cluster level:

- Land area of waterfront employment sites (**Table 3.2**)
- Area of sites, area built on and size of buildings (**Table 3.3**)
- Quality of sites and buildings (**Table 3.4**)
- Sites with developable land or buildings and sites with prospects for intensification (**Table 3.5**)
- Number of sites with employment designations (**Table 3.6**)
- High level estimate of the employment capacity of sites based on current land use and layout (**Table 3.7**)
- Main land uses currently located on sites (**Table 3.8**)
- Proportion of sites used by marine and maritime activities and associated business activities (**Table 3.9**)
- Land and marine infrastructure and assets (**Table 3.10**)
- Strategic road and rail access, and site access by water (**Table 3.11**); and
- Areas at risk from flooding and environmental designations (**Table 3.12**).

3.2.8 Information at a site specific level is held in the Waterfront Sites Register.

3.2.9 Definitions, assumptions and sources of information drawn upon are set out under each table.

3.3 Quantity of Land

Table 3.2: Land Area of Waterfront Employment Sites

Land	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
All 97 Sites [1]	7	16	11	12	18	19	14	97
Total Land Take of Sites (sqm)	150,700	2,836,400	3,279,000	488,200	529,900	496,000	9,628,200	17,408,400
Hectares equivalent	15.1	283.6	327.9	48.8	53.0	49.6	962.8	1,740.8
Smallest Land Take (sqm)	11,500	1,100	3,100	2,700	7,000	1,000	10,100	-
Largest Land Take (sqm)	49,100	1,261,100	1,075,200	215,000	109,700	67,100	4,463,600	-
Median Land Take (sqm)	16,300	21,500	223,200	19,300	22,900	20,400	165,600	-
All 69 Sites [2]	7	7	9	10	17	14	5	69
Total Land Take of Sites (sqm)	150,700	1,022,800	1,140,600	270,500	511,200	451,000	886,700	4,433,500
Hectares equivalent	15.1	102.3	114.1	27.1	51.1	45.1	88.7	443.4
Smallest Land Take (sqm)	11,500	8,200	3,100	4,600	7,000	2,700	52,700	-
Largest Land Take (sqm)	49,100	831,100	329,200	81,000	109,700	67,100	566,400	-
Median Land Take (sqm)	16,300	21,500	69,400	19,300	26,200	28,300	59,500	-

Source: AECOM. Figures may not sum due to rounding
Note: Measurements are of land taken up by the site. Areas used off shore, e.g. via pontoons, have not been estimated.

1. All employment waterfront sites identified in scoping and included on the Waterfront Sites Register.
2. As discussed in paragraphs 3.2.2 and 3.2.3 above the 69 sites do not includes those sites occupied by the MoD, utilities operators, run as commercial ports, ferry operations or are solely leisure marinas.

Table 3.3: Area Built on and Size of Buildings by Cluster (69 Sites)

Quantity: Sites	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Buildings on Sites								
Total Building Footprint (sqm)	9,000	110,000	237,000	35,000	109,000	123,000	122,000	745,000
Total Land Not Built on (sqm) [1]	141,700	912,800	903,600	235,500	402,200	328,000	764,700	3,688,500
Proportion of Sites Built on	6%	11%	21%	13%	21%	27%	14%	17%
Size of Building Footprints [2]								
Less than 1,000 sqft	28%	21%	36%	10%	7%	11%	6%	16%
1,000 sqft to <10,000 sqft	69%	36%	38%	74%	54%	52%	18%	51%
10,000 sqft and over	4%	44%	26%	16%	39%	37%	76%	33%

Source: AECOM. Figures may not sum due to rounding

1: Not all of this land could be directly used for a business's operation: the figure includes vacant land, land with derelict buildings and land used to support other aspects of a business's operation which may be deemed non-production e.g. space for car parking.
2: Measurement relates to the building footprint not the division of space within the building.

3.4 Quality of Sites and Buildings

Table 3.4: Number of Sites and Buildings by Quality Ratings by Cluster (69 Sites)

Quality	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Quality of Sites [1]								
Very good or good	5	4	6	10	6	7	2	40
Poor or very poor	2	3	2	0	9	6	1	23
Not assessed	0	0	1	0	2	1	2	6
Quality of Buildings [2]								
Very good or good	6	3	7	10	10	7	2	45
Poor or very poor	1	4	1	0	5	6	1	18
Not assessed	0	0	1	0	2	1	2	6

Source: AECOM
Figures may not sum due to rounding

1. The assessment of quality of buildings is subjective, and broadly based on the following criteria:
• Very Good / Good: buildings in immaculate/ good state, exterior fittings in good / reasonable condition and immediate surroundings well kept.
• Poor / Very Poor: exterior of the building showing signs of wear or poor condition, exterior fittings in poor condition / broken and surroundings are poorly kept/ not maintained.

2. The assessment of quality of sites is subjective, and broadly based on the following criteria:
• Very Good / Good: public realm within and surrounding the site are of very good / good quality (no/few potholes, no/limited amounts of litter, no uncollected rubbish, street furniture is suitably maintained). There is enough street lighting and no perceived safety issues. The site is not polluted by noise or air pollution from neighbouring uses and/or heavy street traffic.
• Poor / Very Poor: public realm within and surrounding the site are of poor quality (evidence of some potholes, litter or uncollected rubbish, poorly maintained/damaged street furniture). Street lighting may be inadequate and there may be some perceived safety issues. The site may be polluted by noise or air pollution uses and/or heavy street traffic.

3.5 Development Prospects and Employment Designations

Table 3.5: Number of Sites with Developable Land or Buildings and Intensification Prospects (69 Sites)

Prospect	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Development potential								
Sites with Vacant Land [1]	0	1	1	0	5	2	2	11
Sites with Derelict Buildings [2]	0	3	0	0	1	3	0	7
Sites with Vacant Buildings [3]	7	7	8	10	16	13	4	65
High Intensification Prospects [4]	0	0	1	0	3	1	2	7
Total	7	11	10	10	25	19	8	90

Source: AECOM
Figures may not sum due to rounding

1. Vacant Land: Land which is not in use. Does not include temporary uses such as car parking or open storage, which are identified under prospects for intensification, or sites with planning permissions granted.
2. Derelict Buildings: Proportion of buildings on the site which are not fit for purpose and not marketable.
3. Vacant Buildings: Floorspace in buildings which are fit for purpose (not including derelict buildings), as observed from, site surveys.
4. Intensification: Land which is underused; land which is inefficiently laid out (boundary or site shape); space within buildings which is underused (but not vacant or derelict); and/or the layout of buildings is inefficient. Sites which are used as open storage or aggregate / minerals / waste recycling are not included as their capacity requirements may vary substantially over time.
Note that the four assessments are mutually exclusive.

3.6 Employment Designations

Table 3.6: Number of Sites with Employment Designations (69 Sites)

Prospect	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Designated for Employment [1]								
Employment land and water access	0	2	6	10	15	14	3	50
Mixed-use or regeneration	0	6	0	0	7	12	0	25

Source: AECOM
Figures may not sum due to rounding

1. Designated for employment: Sites designated for employment land (B1a/b, B1c, B2 or B8 use classes), the potential for mixed use or regeneration or with water access; as per policy designations provided by Solent LEP local authorities.

3.7 Indicative Employment Estimate

Table 3.7: Employment Capacity of Sites Based on Current Use and Layout (69 Sites)

Employment estimate	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Total Employment (FTE) on Site [1 2]	190	1,140	3,110	780	2,040	2,150	1,550	10,960
Total Employment (FTE) *on Site by Size Band (Number of Sites)*								
<25	4	3	5	2	3	1	2	20
25 to <100	3	2	0	5	7	8	0	25
100 to <250	0	0	1	3	5	1	1	11
250 to <500	0	1	1	0	1	3	1	7
500+	0	1	2	0	1	1	1	6
All Sites	7	7	9	10	17	14	5	69

Source: AECOM
Figures may not sum due to rounding

1. FTE: Full time equivalent jobs. It is recognised however that for some marine and maritime activities, especially those associated with the leisure industry e.g. dry stack operations, boat repair, refit, etc. the number of jobs supported by a site is likely to change over the course of a year.
2. The figures provide a high level estimate of the potential number of jobs that sites could currently support. In absence of any site specific employment data this estimate is made based on:
• The main land use / business activity on site;
• The proportion of site which is actively used (less vacant land, derelict buildings and vacant floorspace);
• A suitable employment density to reflect the nature of main land use / business activity.

The 69 waterfront sites are estimated to currently support in the region of 11,000 FTE jobs. Given the complex nature and unique operations of the 28 sites operated by the MoD, utility companies, and as commercial ports, ferry terminals and marinas, it is hard to accurately estimate how many jobs the 28 sites could support with site specific information.

3.8 Land Uses

Table 3.8: Number of Sites and their Main Land Uses (69 Sites)

Land use	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Marine Leisure & Recreation [1a]	5	1	5	10	5	7	0	33
Boat Building and Repair	5	4	5	10	5	7	2	38
Marine / Maritime Supply Chain	0	1	1	0	2	5	1	10
Research and Development	0	1	1	0	0	2	1	5
General Office	0	1	2	0	5	4	0	12
General Industry and Sui generis	1	2	3	0	8	5	2	21
Open Storage and Warehousing	2	1	4	2	11	4	4	28
Aggrgt / Minerals / Waste / Utilities	2	0	1	0	5	3	2	13
If all 97 sites are assessed then the count of Land Use changes with a further:								
Commercial Ferry / Port	0	2	0	0	0	2	4	8
Defence Activities	0	3	2	0	0	0	1	6
Utilities	0	0	0	1	0	1	3	5
Marine Leisure & Recreation [1b]	0	5	0	1	1	3	2	12

Source: AECOM
Figures may not sum due to rounding
Land use categories describe how the site is mainly used at present. Based upon field survey of sites and supporting desk-based research.
1a and 1b: Marine leisure and recreation uses under 1b are sites which operate solely as marinas whereas site under 1a include other marine and maritime employment activities on sites, not just marinas. Note that one site can have more than one land use.

3.9 Clustering of Marine and Maritime Activities on Sites

Table 3.9: Proportion of Site Used by Marine and Maritime (MM) Activities and Associated Business Activities (69 Sites) [1]

Clustering	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Number of Sites with MM [2]	5	4	5	10	9	9	4	46
Proportion of site used by MM by number of sites:								
<25%	0	0	1	0	3	0	1	5
25% to < 50%	0	1	0	0	0	2	0	3
50% to < 75%	0	0	0	0	0	2	0	2
75% to 100%	5	3	4	10	4	3	3	32
No marine or maritime	2	2	4	0	8	5	1	22
Weighted Proportion of Site with MM [3]	69%	47%	46%	100%	32%	43%	59%	53%

Source: AECOM
Figures may not sum due to rounding

1. Includes businesses associated with the marine and maritime sector involved in the supply chain, such as sail-making, joinery, moulding, electronics and some design businesses.
2. Waterfront sites were identified based on their location not by their activities. Some sites adjacent to water were found not to support marine and maritime activities.
3. Indicative proportion of sites supporting marine and maritime sector business activities or closely related activities. This estimate is weighted on count not site area.

3.10 Sites Assets

Table 3.10: Number of Land and Water Infrastructure Items and Assets Identified (69 Sites) [1]

Infrastructure / Assets	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Quay Jetty / Moorings / Pontoons / Pier	7	13	10	12	17	16	13	88
Slipway Boat rails	3	5	7	5	8	9	6	43
Mobile Boat Hoists / Lifts Fixed Cranes (Jib/Tower)	5	6	7	10	9	7	6	50
Covered Dry Storage Open Dry Storage Dry Dock	6	6	6	10	9	10	2	49
Freight Transfer Facilities Container Cargo Facilities Ro-Ro Cargo Facilities Bulk Cargo Facilities	1	4	0	0	0	2	9	16

Source: AECOM
Figures may not sum due to rounding

1. Assets identified from field survey of sites and supporting desk-based research, and recorded against the categories listed.

Note: Due to the operations and activities of leisure marinas, commercial ferry ports, docks and defence sites, if all 97 sites are assessed then there are significantly more sites with ‘Quay, Jetty / Moorings / Pontoons / Piers’ (87) and Freight, Container, Ro-Ro and Bulk Transfer facilities (16).

3.11 Strategic Site Access

Table 3.11: Strategic Road and Rail Access, and Water Access (69 Sites)

Infrastructure / Assets	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Strategic Road Access[1]								
Direct Strategic Road Access	0	0	2	0	0	0	0	2
Indirect Strategic Road Access	2	2	5	4	15	0	3	31
No Access by Strategic Roads	5	5	2	6	2	14	2	36
Rail [2:] Freight Terminal	0	0	0	1	0	0	5	6
Unrestricted Marine Access								
Unrestricted Access to Water [3]	1	4	2	6	10	6	4	33
Water Depth at CD, Deepest (m) [4]	1.5	5.6	2.0	3.3	3.0	4.5	7.1	
Water Depth at CD, Median (m) [4]	0.5	2.2	-0.7	2.4	2.2	0.8	3.1	

Source: AECOM
Figures may not sum due to rounding

1. Access to the trunk road network: Direct access indicates that the site has easy access to the trunk road network; Indirect access, that the site has access to the trunk road network via A-roads; No access, that the site does not have easy access to the strategic trunk road network.
2. Sites which have direct access to the freight rail network (i.e. terminal is on site). If all 97 sites are assessed than there are 6 sites with freight rail access.
3. Count of sites where the greatest depth of water accessible from the site, taking account of its marine infrastructure such as slipways, pontoons and jetties, etc. is at least 1.5m above at Chart Datum (which is approximately the level of Lowest Astronomical Tide). Source: Admiralty Chart Data, desk-based research and consultation.
4. Measure of the depth of water accessible from site, taking into account marine infrastructure. Measured in metres at Chart Datum. Negative figures are drying heights above CD and indicate an area which dries out. Source: Admiralty Chart Data.

3.12 Areas at Risk from Flooding and Environmental Designations

Table 3.12: Flood Risk, European, National and Local Environmental Designations (69 Sites)

Infrastructure / Assets	Langstone / Chichester	Lower Prtsmth Hrbr	Upper Prtsmth Hrbr	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
High Flood Risk [1]	1	4	3	4	5	7	2	26
Special Protection Area (SPA)[2]	2	2	8	5	2	5	0	24
Ramsar site (RAMSAR)[2]	2	2	8	5	2	5	0	24
Special Area of Conservation (SAC)[2]	2	0	0	10	0	11	0	23
Site of Special Scientific Interest (SSSI)[2]	2	3	8	5	2	5	0	25
All Local Environmental Designations [2 3]	1	1	0	3	4	0	0	9
Total	10	12	27	32	15	33	2	131

Source: AECOM
Figures may not sum due to rounding

Note one site can have more than designation.

1. Flood risk is identified by the Environment Agency's (EA) classification of risk of flooding from Rivers and Sea. High: each year, there is a chance of flooding of greater than 1 in 30 (3.3%). The risk of flooding at each site has been identified using EA mapping. Where multiple flood risk zones overlap on one site the flood risk zone which covers the greatest proportion of the site has been recorded / both zones have been recorded where there is equal risk.
2. Site area (on shore or off shore) intersects with the designation.
3. Defined as SINC and Local Nature Reserves only.

3.13 Summary of Waterfront Sites' Characteristics

3.13.1 The analysis above demonstrates the breadth of waterfront sites across the Solent area, the diverse range of businesses activities which they support and the scale of opportunity which could be realised to accommodate growth. Broadly, it can be seen that there are a large number of waterfront sites within the Solent with good, unrestricted access to water and these sites are typically well used. Though some sites are currently performing less well they may have capacity to accommodate further economic growth and be used more efficiently in the future.

3.13.2 The following conclusions can be drawn from the site analysis:

- **Land Area:** There is approximately 1,730ha of waterfront employment land across 97 sites in the Solent study area. 28 sites owned by the MoD, commercial ports, ferry terminals and leisure marinas comprise 1,287ha. The largest sites are within the Southampton Water / River Test and Upper Portsmouth Harbour clusters, and include sites such as the Port of Southampton, the former Fawley Power Station and HMNB Portsmouth. The remaining 443ha of land is distributed across 69 waterfront employment sites used by other marine and maritime uses, general industry or other land uses.
- **Premises:** Analysis of the proportion of waterfront employment sites built upon shows that sites along the River Itchen and River Medina can be seen to be the most intensively used. Further, it can be seen that the sites with the greatest proportion of large units are found within the Lower and Upper Portsmouth Harbour area and within Southampton Water / River Test. Upper Portsmouth Harbour and Langstone and Chichester Harbour have the greatest prevalence of small units.
- **Quality of Site and Buildings:** The quality of sites across the Solent is mixed with 64% assessed to be of good or very good quality and 36% assessed to be of poor or very poor quality.[7] Generally, the poorest quality sites are found along the River Itchen and River Medina although the sites observed are typically fit for purposes given the nature of the industrial activities. However there were sites recorded which require investment. The best quality sites were found along the River Hamble which reflects the nature of their use and the need to attract leisure users. Overall building quality was found on the whole to be good or very good with 71% of sites recorded as having good or very quality buildings.[7]
- **Development Potential:** Across the Solent 37 sites have been identified with development potential, the majority of which are found along the River Itchen and the River Medina. All of the sites identified as having development potential are currently designated for employment use in local planning policy.
- **Employment:** Waterfront employment sites within the study area are estimated to support approximately 11,000 jobs. The majority of sites (66%) within the Solent are estimated to employ less than 100 people; however there are 7 sites which are estimated to employ over 500 people demonstrating the range of

[7] Not accounting for the six sites for which site and building quality wasn't possible to determine due to access restrictions.

sites and employment activities across the Solent as well as their impact on local economies.

- **Site Activity:** There is a significant presence of marine and maritime businesses and associated activities across waterfront employment sites within the study area. However, there is also a prevalence of non-marine and maritime uses across the identified sites, particularly along the River Itchen and River Medina. These uses are typically B-class uses including office, general industry, warehousing and open storage. There are also a number of sites utilised for aggregate and waste activities which require access to water and compete with marine and maritime businesses.
- **Marine and Maritime Clusters:** Clustering of marine and maritime activities is recorded within 46 of waterfront employment sites. The majority of which were found to be comprised almost entirely of marine and maritime businesses demonstrating the strength of clustering on these sites and across the Solent.
- **Waterfront Assets:** This study identified a wide range of marine and maritime assets within waterfront employment sites. The vast majority of waterfront employment sites had infrastructure allowing access to water (e.g. pontoons, slipways, quay walls etc.) as well as assets such as boat hoists and open/covered dry stack facilities. The range of sites with these types of assets is reflective of the strength of the marine and leisure sector across the study area as a whole.
- **Access:** With regards to access a small number of waterfront employment sites across the study area had direct strategic road access to trunk roads. A small number of sites had freight rail access but these were typically MoD sites, commercial ports or utilities. In total 33 sites were identified with unrestricted permanent access to water.
- **Constraints:** A wide range of sites were recorded across the Solent with flooding issues and environment designations the most prevalent. These constraints could potential constrain a sites development potential and inhibit enhancement of marine accessibility if constraints on dredging exist for example.

3.14 Potential Loss of Waterfront Sites Capacity

3.14.1 Information on planning permissions completed or granted provided by Hampshire County Council (HCC) and the Isle of Wight (IoW) Council, found that since January 2009 a number of planning applications have been implemented or granted on smaller waterfront sites in the study area in favour of non B-use class floorspace.[8] The loss of B-use class floorspace on waterfront sites actively used for MM activities is estimated at approximately 5,000sqm, and includes the loss of warehousing, storage and workspace space to non-B uses: mainly residential.

3.14.2 Across the Solent area there is evidence that some large sites coming under increasing pressure from competing land uses. Four large waterfront employment sites which are currently subject to planning applications, one of which has been granted permission. They include the former Vosper Thornycroft shipyard (now known as Centenary Quay) on the east

[8] B-use class floorspace includes light industry, manufacturing and storage space, which typically support marine and maritime activities.

bank of the River Itchen and Chapel Riverside on the west bank of the River Itchen, Southampton; Medina Yard on the Isle of Wight; and Trafalgar Wharf on the north side of Portsmouth Harbour. Medina Yard and Trafalgar Wharf currently support clusters of marine and maritime activities and are subject to large-scale mixed-use redevelopment proposals.

3.14.3 The reduction in capacity (or total loss) of these sites to non-B use classes is likely to result in a reduction in waterfront site capacity in locations which have good access to the water, displace existing MM activities which will have knock on effects through the local supply chain if displaced businesses cannot find suitable accommodation and relocate within the vicinity.

3.14.4 Moreover, there is a strategic, long term concern: once sites are lost to non-B use classes such as residential or retail, it is unlikely that they will ever be converted back to support marine and maritime use meaning that their capacity to support the MM sector will be lost forever.

3.14.5 The following chapter presents our categorisation of waterfront employment sites and provides an assessment of their capacity to accommodate marine and maritime activities as well as recommendations on likely policy direction.

4 SITE CATEGORISATION

4.1 Introduction

4.1.1 This chapter provides a framework to inform thinking on the current role of waterfront sites and the range of opportunities sites could offer in meeting future demand for land by marine and maritime activities in the study area. Separately, it also considers the importance of each site in supporting marine and maritime activities relative to one another.

4.1.2 The framework categorises each site into a typology determined by the site's key characteristics and capacity or potential capacity to support the marine and maritime sector. Each site is also scored against a range of criteria and a relative level of importance assigned to the site.

4.1.3 In combination, the typology and relative level of importance can be used to inform thinking on policy development and direction, both at a site level (such as site retention or where support could be given to encourage marine and maritime growth) and across the wider study area (for instance what is the development potential of smaller sites relative to large well known sites).

4.1.4 The framework results however are derived from a limited amount of information captured in the Waterfront Sites Register available at the time of collection, and sites are inherently more complex than a discrete set of measurements or variables. For example, a commercial property market angle on a site's marketability or cost information regarding site contamination has not been captured. The framework should therefore be used to inform thinking on policy and strategy direction but should not solely determine that direction.

4.1.5 **The 28 sites listed in Table 3.1 have been excluded from site categorisation given their resilience to pressure from competing land uses and their limited prospect for change of land use and ownership in the short to medium term.**

4.2 Site Typologies

4.2.1 Typologies are derived from three factors, which have been assessed for each waterfront site:

- Marine access: this is based on an assessment of whether a site has good access to water in relation to water depth at chart datum and marine infrastructure available at the site, enabling access to the water[9]
- Presence of marine and maritime activities: sites with existing clusters of marine and maritime activity provide an indication of the site's attractiveness to the sector; and
- Development potential: whether a site has potential to grow, based on existence of vacant land or derelict buildings, and prospects for redevelopment and intensification (for instance, inefficient/ poor land and building utilisation).

4.2.2 The combination of these three factors produces eight site typologies as set out in **Figure 4.1**.

4.2.3 Each of the eight typologies has been given a different title based on the combination of whether there is: adequate marine access/ improvements are required or no access; evidence of marine and maritime activities and associated activities on site or wider industrial activities

[9] For some business activities in the marine and maritime sector, access to the water may be less important that access to strategic road and rail. However, the focus of this study is on waterfront sites, and therefore the quality and ease of access to the water directly from the site is judged to be comparatively more important.

unrelated to the marine and maritime sector; and the prospects for improving the utilisation of land and buildings for employment uses.

4.2.4 These eight typologies are:

1. Established Marine and Maritime Site
2. Industrial Site; Consolidate / Transition to Marine and Maritime, if suitable
3. Established MM; Create/ Improve Access to Benefit Marine and Maritime, if suitable
4. Established Industrial Site; Create/ Improve Access and Transition to Marine and Maritime, if suitable
5. Established MM; Grow and support for MM
6. Established MM Site; Create/ Improve Access and Grow for Marine and Maritime, if suitable
7. Established Industrial Site; Grow and Transition to Marine and Maritime, if suitable; and
8. Established Industrial Site; Create/ Improve Access Grow and Transition to Marine and Maritime, if suitable.

4.2.5 The number of waterfront sites by typology and cluster is set out in **Table 4.1**.

4.2.6 These eight typologies can be grouped into three broad themes which suggest an approach for policy / intervention:

Support for ongoing MM use: sites falling within Typologies 1 and 3

Invest and grow for MM use, if suitable: sites falling within Typologies 5, 6 and 7

Consolidate and/or transition to MM use, if suitable: sites falling within Typologies 2, 4 and 8.

4.2.7 It is important to note however that, in absence of any demand assessment, it is not appropriate to make judgements on the amount of land on waterfront sites which needs to be retained to meet the needs of MM businesses over the long term. On that basis we have not suggested a typology or broad theme which suggests a site should not be supported for MM activities or let go to alternative uses.

4.3 Relative Levels of Importance

4.3.1 In addition to assigning each of the 69 sites a typology, the relative level of importance of each site was also assessed. Sites were assessed and scored on a combination of factors regarding the current conditions of the site. Factors include: size of site, water frontage, employment capacity, quality of site and buildings, potential to accommodate change and grow, strategic road and rail access, water depth and permanence of access to water, flood risk and environmental designations. The score sorted sites into three tiers, which help to describe the relative importance of a site's characteristics to support the marine and maritime economy in the study area.

4.3.2 Sites defined as Tier 1 are of prime importance and are relatively the most important sites for MM activities in the Solent. They display, on balance, the best characteristics to give continued support and growth to marine and maritime business. Sites which on balance display characteristics which are favourable to marine and maritime businesses, though less

consistently across the criteria assessed, are relatively less important than the Tier 1 prime sites and are deemed to be of secondary or tertiary importance to the MM sector in the study area and are listed as Tier 2 and Tier 3 sites respectively.

4.3.3 By combining a site's relative importance compliments and typology theme, we are able to identify which sites is relatively more important to support ongoing MM use, invest and grow or consolidate / transition to MM use.

4.4 Site Typology Theme and Relative Levels of Importance

4.4.1 The 69 sites assessed have been grouped under one of three Typology themes, as referred to above under paragraph 4.2.6, and by their relative level of importance, and are presented in tables: **Table 4.3**, **Table 4.4** and **Table 4.5.**

4.4.2 As stated above in the introduction of this section, the 28 sites operated by the MoD, utilities companies and as commercial ports and ferry terminals, and solely as marinas, have been excluded from site categorisation. The 20 sites operated by the MoD, utilities companies and as commercial ports and ferry terminals can be consider as strategically important sites and very important for the marine and maritime sector given their access to deeper water and infrastructure assets. Many of these sites are also large with good strategic access and sites such as the former Fawley Power Station would represent a significant opportunity should they come forward for redevelopment. In addition the eight marinas, excluded from this categorisation, are likely to have an important function at a local level for the leisure marine industry.

Figure 4.1: Eight Waterfront Site Typologies

1. Established Marine and Maritime Site

	Good Marine Access	Presence of MM Activities	Development Potential
Yes	■	■	
No			■

2. Industrial Site; Consolidate / Transition to Marine and Maritime, if suitable

	Good Marine Access	Presence of MM Activities	Development Potential
Yes	■		
No		■	■

3. Established MM; Create/ Improve Access to Benefit Marine and Maritime, if suitable

	Good Marine Access	Presence of MM Activities	Development Potential
Yes		■	
No	■		■

4. Industrial Site; Create/ Improve Access and Transition to Marine and Maritime, if suitable

	Good Marine Access	Presence of MM Activities	Development Potential
Yes			
No	■	■	■

5. Established MM; Grow and Support for MM

	Good Marine Access	Presence of MM Activities	Development Potential
Yes	■	■	■
No			

6. Established MM Site; Create/ Improve Access and Grow for Marine and Maritime, if suitable

	Good Marine Access	Presence of MM Activities	Development Potential
Yes		■	■
No	■		

7. Industrial Site; Grow and Transition to Marine and Maritime, if suitable

	Good Marine Access	Presence of MM Activities	Development Potential
Yes	■		■
No		■	

8. Industrial Site; Create/ Improve Access; Grow and Transition to Marine and Maritime, if suitable

	Good Marine Access	Presence of MM Activities	Development Potential
Yes			■
No	■	■	

Source: AECOM

Table 4.1: Number of Waterfront Sites by Typology and Cluster (69 Sites)

Typology	Langstone / Chichester	Lower Portsmouth	Upper Portsmouth	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Support for Ongoing MM Use	***5***	***4***	***4***	***10***	***5***	***1***	***3***	***32***
1. Established MM Site	1	2	2	6	4	1	3	19
3. Established MM: Create / Improve Access to Benefit MM	4	2	2	4	1	0	0	13
Invest and Grow	***0***	***3***	***0***	***0***	***3***	***8***	***1***	***15***
5. Growth Opportunity: Grow and Support for MM	0	0	0	0	0	4	0	4
6. Growth Opportunity: Improve Access and Grow for MM	0	1	0	0	1	4	0	6
7. Invest and Grow: Grow and Transition to MM	0	2	0	0	2	0	1	5
Consolidate / Transition	***2***	***0***	***5***	***0***	***9***	***5***	***1***	***22***
2. Industrial Site: Consolidate / Transition to MM	0	0	1	0	5	1	0	7
4. Industrial Site: Create / Improve Access, Transition to MM	2	0	2	0	0	3	0	7
8. Industrial Site; Create / Improve Access, Grow & Transition to MM	0	0	2	0	4	1	1	8

Source: AECOM; Note, actions supporting, investing, growing or enabling consolidation and transition are should be subject to further investigations / decision making.

Table 4.2: Relative Importance of Waterfront Sites (69 Sites)

Relative Importance	Langstone / Chichester	Lower Portsmouth	Upper Portsmouth	River Hamble	River Itchen	River Medina	Southampton Water / R.Test	Total
Sites Score / with Importance Level (Categorised in Typologies 1 to 8)	***7***	***7***	***9***	***10***	***17***	***14***	***5***	***69***
Tier 1. Prime Importance	0	3	3	4	7	2	4	23
Tier 2. Secondary Importance	1	3	0	5	6	7	1	23
Tier 3. Tertiary Importance	6	1	6	1	4	5	0	23

Source: AECOM
Figures may not sum due to rounding

Note: The level of relative importance is based on the information available and recorded in the Waterfront Sites Register. The level of relative importance gives an indication of the relative importance across a range of factors. It may be used to inform thinking on policy recommendations but not to determine them.

Table 4.3: Support Ongoing MM Use (Typologies 1 and 3: 32 Sites)

Site #	Site Name	Relative Importance Level	Typology	Cluster
1	Sparkes Marina	Tier 3	3	Langstone and Chichester Harbour
2	Wilson's Boatyard	Tier 3	3	Langstone and Chichester Harbour
3	Mill Rythe Boatyard	Tier 3	3	Langstone and Chichester Harbour
4	Northney Marina	Tier 2	3	Langstone and Chichester Harbour
7	Southsea Marina	Tier 3	1	Langstone and Chichester Harbour
9	Town Quay- BAR Racing	Tier 1	1	Lower Portsmouth Harbour
12	Port Solent Marina	Tier 1	1	Upper Portsmouth Harbour
15	Trafalgar Wharf	Tier 1	1	Upper Portsmouth Harbour
16	Wicor Marina	Tier 3	3	Upper Portsmouth Harbour
17	Lower Quay	Tier 3	3	Upper Portsmouth Harbour
25	Endeavour Quay	Tier 1	1	Lower Portsmouth Harbour
26	Gosport Boat Yard (Coldharbour)	Tier 3	3	Lower Portsmouth Harbour
31	Haslar Marine Technology Park	Tier 2	3	Lower Portsmouth Harbour
35	Hamble River Boatyard	Tier 2	3	River Hamble
36	Swanwick Marina	Tier 1	1	River Hamble
37	Universal Marina	Tier 1	1	River Hamble
38	Stone Pier Yard	Tier 2	3	River Hamble
39	Riverside Boatyard	Tier 2	3	River Hamble
41	Deacon's Boat Yard	Tier 2	1	River Hamble
42	Elephant Boat Yard	Tier 3	3	River Hamble
43	Mercury Yacht Harbour	Tier 2	1	River Hamble
44	Port Hamble Marina	Tier 1	1	River Hamble
45	Hamble Point Marina	Tier 1	1	River Hamble
52	Drivers Wharf	Tier 1	1	River Itchen
54	Saxon Wharf Boatyard and Marina	Tier 1	1	River Itchen

Site #	Site Name	Relative Importance Level	Typology	Cluster
56	Shamrock Quay	Tier 1	1	River Itchen
59	Ocean Quay	Tier 1	3	River Itchen
63	American Wharf	Tier 2	1	River Itchen
68	National Oceanographic Centre	Tier 1	1	Southampton Water / River Test
75	Hythe Marine Park	Tier 1	1	Southampton Water / River Test
78	Calshot Activities Centre	Tier 1	1	Southampton Water / River Test
80	Trinity Wharf	Tier 2	1	River Medina

Source: AECOM

Table 4.4: Invest and Grow for MM Use, if Suitable (Typologies 5, 6 and 7: 15 Sites)

Site #	Site Name	Relative Importance Level	Typology	Cluster
27	Royal Clarence Yard Retained	Tier 1	7	Lower Portsmouth Harbour
30	Priddy's Hard	Tier 2	7	Lower Portsmouth Harbour
34	Daedalus- Solent Enterprise Zone (Waterfront Sites)	Tier 1	6	Lower Portsmouth Harbour
47	Centenary Quay	Tier 1	7	River Itchen
48	Land South of Smiths Quay	Tier 3	6	River Itchen
60	Dibbles Wharf	Tier 2	7	River Itchen
72	Marchwood Industrial Park	Tier 1	7	Southampton Water / River Test
79	Venture Quays	Tier 1	5	River Medina
83	Clarence Boatyard	Tier 3	6	River Medina
85	Kingston Wharf	Tier 2	5	River Medina
87	Island Harbour Marina	Tier 3	6	River Medina
88	Newport Harbour	Tier 3	6	River Medina
89	Blackhouse Quay	Tier 3	6	River Medina
93	Land South of Medina Yard	Tier 2	5	River Medina
94	Medina Yard	Tier 1	5	River Medina

Source: AECOM

Table 4.5: Support Transition to MM Use, if Suitable (Typologies 2, 4 and 8: 22 Sites)

Site #	Site Name	Relative Importance Level	Typology	Cluster
5	Bedhampton Wharf	Tier 3	2	Langstone and Chichester Harbour
6	Kendall's Wharf	Tier 3	2	Langstone and Chichester Harbour
14	Tipner West	Tier 1	2	Upper Portsmouth Harbour
18	Upper Quay	Tier 3	2	Upper Portsmouth Harbour
20	Vector Aerospace	Tier 3	2	Upper Portsmouth Harbour
21	Fareham Reach Industrial Park	Tier 3	2	Upper Portsmouth Harbour
22	Quay Lane Industrial Estate	Tier 3	2	Upper Portsmouth Harbour
49	Spitfire Quay/Vancouver Wharf/ Merlin Wharf/Smiths Quay	Tier 1	4	River Itchen
50	Willment Industrial Estate	Tier 3	4	River Itchen
53	Princes Wharf	Tier 2	4	River Itchen
55	Lower William Street Industrial Estate	Tier 1	4	River Itchen
57	Bakers Wharf	Tier 3	4	River Itchen
58	Millbank Wharf	Tier 3	4	River Itchen
61	Leamouth Wharf	Tier 2	4	River Itchen
62	Burnley Wharf	Tier 2	8	River Itchen
64	Chapel Riverside	Tier 2	8	River Itchen
71	Eling Wharf	Tier 2	8	Southampton Water / River Test
82	GKN Aerospace Services	Tier 2	8	River Medina
86	Kingston Marine Park	Tier 2	8	River Medina
90	Vestas Technology UK-Manufacturing Site	Tier 1	8	River Medina
91	Vestas Technology UK-R&D Facility	Tier 2	8	River Medina
92	PD Port Services	Tier 3	8	River Medina

Source: AECOM

5 DIRECTION OF DEMAND

5.1 Introduction

5.1.1 This section provides a high level overview of the demand for waterfront sites in the study area by considering the profile of the marine and maritime sector, local/regional factors impacting on demand, and trends at a national/international level which are driving change across the sector. Findings have been informed by desk-based research and consultation with key stakeholders.

5.2 Context for Growth

5.2.1 Recent studies have profiled the MM sector's importance in the Solent area and found that[10]:

- There are over 3,000 businesses within the Solent LEP area supported by the marine and maritime sector;
- The sector contributes 20.5% of the Solent's gross value added (GVA); and
- The sector accounts for 40,000 direct jobs within the Solent area and a further 8,300 jobs once indirect and induced effects are accounted for.

5.2.2 The degree of clustering of marine and maritime activities within the Solent is illustrated by location quotients[11] which gives a measure of the degree of specialisation of a sector. Data points to a strategic, competitive advantage in MM activities in the Solent area compared to the national average across most sub-sectors of the MM sector, but particularly within repair and maintenance of ships and boats and sea and coastal passenger water transport.[12]

5.2.3 Strengths of the marine and maritime sector within the Solent include the presence of international business occupiers, world class infrastructure and facilities, networks and brands of national significance: examples include the Royal Navy at Portsmouth, which supports high-tech defence and advanced manufacturing activities; the ports of Southampton and Portsmouth, which provide important gateways to the UK for trade as well as for cruise activities; yachting at Cowes; and the National Oceanographic Centre, and its links with education centres and world class research facilities. The sector also has a highly integrated supply chain with the local people and their skills firmly embedded in product and service design and delivery. These strengths provide a platform from which it can grow and diversify.

5.2.4 There are a number of local factors which could provide opportunities for the sector to grow:

5.2.5 *New opportunities at Portsmouth Naval Base:* Whilst current developments such as the closure of shipbuilding at Portsmouth naval base will have an impact upon the sector, there is likely to be new opportunities arising from ship repair and maritime support activities. This will be further enhanced by the arrival of the new QE Class aircraft carriers which will be based at the naval base from 2017.

5.2.6 *Release of MoD owned assets:* There are also likely to be further opportunities for growth within the sector as a result of the release of MoD owned assets such as Marchwood Military

[10] Solent Local Enterprise Partnership (LEP), (2014). *Transforming Solent: Solent Strategic Economic Plan 2014-20*
[11] A location quotient measures the relative size of an industrial sector relative to the national economy A location quotient greater than 1.0 indicates that the rate of employment in that sector is above the national average, whereas a location quotient smaller than 1.0 indicates it is below the national average. A high location quotient (i.e. above 1.0) indicates some degree of specialisation, and the higher the location quotient the greater the specialisation.
[12] Based on location quotients from the BRES data from the Office of National Statistics (as of May 2015)

Port which has the potential to accommodate significant port related activities. In March 2015 the preferred bidder for operating the port was selected as Solent Gateway Limited which is anticipated to commence operations at the port in the autumn. This site represents a significant new supply of land suitable for large scale commercial port activities which will bring investment in infrastructure; consolidate further port activities, raise competitiveness; generate employment and supply chain opportunities across the region; and act as a catalyst to inward economic investment.

5.2.7 *Joint Land Asset Strategy and management programme:* Further work is currently being undertaken as part of the Solent Growth Deal through the Solent Strategic Land and Infrastructure Board (SSLIB). The remit of the SSLIB is to provide a strategic view on public land and property within the Solent area and the board is currently undertaking a Joint Land Asset Strategy and management programme for the disposal and re-use of surplus land and property. This work may well identify new opportunities for the marine and maritime sector.

5.2.8 *Research facilities:* The Solent is also home to world-class research facilities and institutions such as the University of Southampton [13], the National Oceanographic Centre (NOC) Southampton, Southampton Solent University and the University of Portsmouth. In addition there are a number of well-established centres of knowledge and innovation including Qinetiq, ABP Marine Environmental Research, Oil Spill Response, Roke Manor Research, BMT Nigel Gee and the Lloyds Register. There are also a further eight further education colleges which offer marine and maritime specialisms including the recently opened Centre for Engineering, Manufacturing and Advanced Skills Training (CEMAST) at the Daedulus site in Fareham and the Warsash Maritime Academy which is part of the Southampton Solent University's School of Maritime Science and Engineering. Development of Science, Technology, Engineering and Math (STEM) skills are a key priority for the Solent LEP with an estimated net requirement for 3,500 new recruits into the Solent's engineering sector from 2010 to 2020.[14] Existing assets are well placed to respond to the increasing and changing market demands for skills and labour within the marine and maritime sector. There is likely to be a further transition to demand led provision which responds more effectively to local need and emerging requirements.

5.2.9 *Capital investment:* The Solent LEP is also investing £10.9 million in the development of the Isle of Wight College Centre of Excellence for Composites and Advanced Manufacturing which will commence delivery in 2015/16. This centre is being funded through the Solent Growth Deal.

5.2.10 *Economic Development and Planning:* The scale, economic importance and specialisation of the marine and maritime sector in the Solent area is recognised as a strategic priority for local and regional economic development.

5.3 Factors Driving Growth

5.3.1 The opportunities for growth can also be understood in terms of how traditional MM sector activities are changing and how new market opportunities are appearing, driven in part through technology and innovation.

[13] Including the recently opened Southampton Marine and Maritime Institute (SMMI) which includes the Lloyds Register marine headquarters
[14] Working futures

Traditional Marine and Maritime Activities

5.3.2 *Commercial Ports* are accommodating increasingly larger commercial shipping vessels as a consequence of growth within the logistics sector. This growth is placing increasing demand on land requirements for port activities. At present Southampton Port is operating close to capacity due to limited space for expansion. It is likely that further sites for expansion will need to be identified to accommodate the growth potential of the port.

5.3.3 *Southampton Port* is one of the most important strategic gateways for import and export trade activities within the UK. It faces increasing competition from other international ports on the global stage. Future expansion will allow the port to increase its commercial activities and achieve the target of contributing £2.9bn to national GDP by 2030.[15] This will have both direct and indirect implications with regards to demand for waterfront employment sites within Southampton Water / River Test and across the Solent more widely. The recent acquisition of the 113 acre Marchwood and Cracknore Hard Industrial Estates by ABP is an example of this and demonstrates the increasing strength of demand for land to accommodate port related activities.

5.3.4 *Expertise of marine and maritime businesses* within the Solent can also be seen as a key driver of growth across the sector. Griffin Hoverwork's current contract with the Indian Coastguard reflects the Solent's global reputation for marine and maritime capabilities and illustrates the potential for further growth from non-domestic sources.

5.3.5 *Activities associated with boat building, repair and maintenance* are likely to experience change. Boats are increasingly getting larger and requirements to accommodate vessels such as super-yachts will increase the demand for larger waterfront sites with adequate access to deeper water.

5.3.6 *World Class Facilities* for international yachting such as those available in Cowes and at the soon to be completed Ben Ainslie Racing (BAR) centre in Portsmouth build upon the Solent's global reputation for yacht racing. The BAR centre will become the home of the BAR America's Cup sailing team and will become the focal points for the design, construction and development of the BAR boats. These facilities help to drive marine based tourism as well as having positive impacts on local supply chains within the marine and maritime sector, particularly for boat building and repair of leisure vessels.

Technology and Innovation

5.3.7 The future of the marine and maritime sector within the Solent looks set to be defined in part, by advancements in technology and research and development. Developments in composites, autonomous vehicles and sustainable energy (such as tidal power) will alter the nature of the marine and maritime sector within the Solent and have implications for the types of waterfront employment sites and access to water which businesses require.

5.3.8 *The composites sector* is expected to see further growth within the Solent as a consequence of key research, innovation and manufacturing assets as well as proposals for a new Large Structure Composites Centre within the region. This centre would provide an internationally recognised centre of excellence for composites technology and further enhance the Solent's reputation for innovation within the marine and maritime sector as well as within oil and gas, construction and rail industries. Existing businesses such as Magma Global, Green Marine, GKN Aerospace and Vestas are already integrating composites into new and emerging

[15] Solent LEP, (2014). *Transforming Solent: Marine and Maritime Supplement.*

products and markets and further support for this technology would help to fuel further growth across the Solent area.

5.3.9 *Maritime systems are becoming increasingly advanced* and the recently opened Centre for Maritime Intelligence Systems (CIMS) demonstrates the strength of research and development within the marine and maritime sector across the Solent. Other clusters of innovation and technology include Haslar Marine Technology Park, the NOC and Southampton University. These sites typically provide testbeds for new systems and technology and whilst direct access to water is not essential, anecdotal evidence suggests that waterfront sites are preferred to enable testing.

5.3.10 *Marine Autonomous Systems (MAS)* are expected to be another key driver of growth within the Solent. The NOC recently secured £2.9 million worth of funding from Innovate UK to enable collaborative research for MAS within the Solent. The NOC will also soon see the opening of the Marine Autonomous and Robotic Systems Innovation Centre in Southampton which will help to enable the NOC to become a world leader in MAS. This facility will be a key strength within the Solent and will drive growth within what is a predominantly international market.

5.3.11 *Renewable energy generation* could also prove to be a key driver in the demand for waterfront employment sites, particularly in light of proposals for the Navitus Bay wind farm. The Navitus development could have a significant economic impact on the Isle of Wight for existing businesses such as Vestas which have a strong presence on the island. Vestas has recently secured a major contract to supply turbines for the Navitus development. There would also likely be a strong impact on the wider supply chain across the Solent particularly for composites, MAS and commercial boat building for servicing the wind farm.

5.4 Scale of Growth

5.4.1 Relatively little work has previously been undertaken to determine the scale of demand for waterfront employment sites to support the marine and maritime sector. In part, this may be a consequence of the complexity of the sector and the diverse scale and range of land requirements.

5.4.2 Oxford Economics data from 2013, which was drawn on within the Marine and Maritime Supplement[16] indicated that up to 2025 the marine and maritime sector is anticipated to grow by 5% in the Solent area. Our most recent desk-based research, consultation and consensus among consultees indicates that the sector has the potential to grow at a much stronger rate.

5.5 Summary of Demand

5.5.1 This section has identified that there is likely to be continued demand for waterfront employment sites to accommodate marine and maritime activities, as a result of further sustained growth within the sector. The broad direction of demand will have implications for the long-term provision of sites in the Solent. Competing land uses and increasingly complex requirements from modern occupiers will also drive demand for waterfront sites.

5.5.2 Whilst there is expected to be a general increase in demand for waterfront employment sites, it is expected that large sites in particular will be required as occupiers require greater amounts of space and access to water. Advancements in composite technology may drive demand for waterfront sites which can accommodate large composite structures. Increases in

[16] Solent LEP (2014). Transforming Solent: Marine and Maritime Supplement, page 21

demand for larger boats and vessels within the leisure sector will also increase demand for waterfront sites which can handle increasingly larger vessels with access to deeper water.

6 CONCLUSIONS AND RECOMMENDATIONS

6.1.1 The objectives of this study have been to identify and assess the provision of waterfront employment sites across the Solent and provide an evidence base, which can be used by policy makers such as Solent LEP, PUSH and local planning authorities to guide their strategic, long term plan making.

6.1.2 This section outlines the conclusions of our study and presents our recommendations for the future support, investment and management of waterfront sites across the Solent area.

6.1 Conclusions

Provision of Waterfront Sites

6.1.1 This study has identified 97 waterfront employment sites (approximately 1,730ha of employment land) across the Solent. Once sites operated by the MOD, commercial or ferry port activities and utilities, leisure and recreation uses are excluded from the analysis there remain 69 sites (approximately 443ha of employment land) which are currently utilised by marine and maritime activities as well as wider employment uses.

6.1.2 The spatial distribution of these sites is widespread across the Solent area; however the majority of waterfront employment sites are concentrated along the Southampton Water / River Test, the River Itchen, Lower Portsmouth Harbour (including Gosport) and the River Medina.

6.1.3 With regards to quality and characteristics a broad range of sites were recorded across the Solent, however on the whole many sites were found to be performing relatively well with low levels of vacancy recorded. Our findings point towards a diverse and growing marine and maritime economy across the Solent and demonstrate the scale of opportunity which could be forthcoming should further growth and investment in the sector be realised.

6.1.4 This study has also identified a number of highly accessible waterfront locations within the Solent, which are currently occupied by non-marine and maritime uses including aggregate and waste industries. A particular area of opportunity is along the west bank of the River Itchen where there are a number of sites which have good access to water and the potential to accommodate 24 hour working. Should these aggregate businesses be relocated then waterfront sites highly suitable for use by marine and maritime businesses would become available.

Accommodating Demand within Existing Provision

6.1.5 This study has provided a detailed perspective on the supply position of waterfront employment sites within the Solent as well as presenting a broad picture of demand. Though the provision of waterfront sites across the Solent area is substantial vacancy was observed to be generally low, particularly on sites with good characteristics regarding site, premises, infrastructure and strategic access.

6.1.6 Desk-based research and discussions with businesses indicate that the marine and maritime sector in the Solent area is expected to grow and demand for waterfront sites with marine access is likely to be increase.

6.1.7 A key question which follows is should all 97 sites identified be required to meet demand arising over the long term and be offered maximum protection from other uses, such as residential?

6.1.8 On the basis of the research presented in this report, we would reject a protection of all sites. In their current state some sites are not considered fit for purpose for modern marine and maritime occupiers: a number of sites require investment and infrastructure work to make them viable business locations, require enabling work to allow suitable marine access, or are significantly constrained by designations such that on balance they are best retained as general industrial locations.

6.1.9 However, to answer the question with greater clarity and confidence we would recommend further work be undertaken on the scale of demand, and the nature of demand taking into account a commercial market and business perspective. This would help to identify which sites are of interest. Certain sites will also have significant mitigation issues such as flood defence or land remediation which may mean that, for certain uses, the site is commercially unviable.

6.2 Recommendations

6.2.1 This section presents our recommendations for the future management and monitoring of waterfront employment sites across the Solent area. For each recommendation we provide a supporting justification.

Solent Waterfront Employment Sites Report and Register

R1: The Waterfront Employment Sites report and register should be used by local planning authorities and policy makers of the Solent LEP area when developing policies on strategic and local land-use planning and when considering planning applications for waterfront employment sites.

6.2.2 This study and the associated register of sites are valuable tools which should be reviewed by local authorities and their partners when developing strategic land use policies and when making decisions on planning applications. They should be used to inform decisions on how to support, encourage and accommodate the marine and maritime sector and associated business activities.

6.2.3 In considering planning applications for waterfront employment sites, local authorities and partners should draw upon the Waterfront Site register to reflect on:

- The typology and relative importance attributed to the site, as an indication of the role, potential and value of the site for MM activity in the wider Solent area, not just within the local planning authority's administration boundary. (Note that the typology and relative level of importance of each waterfront site is based on their current use. Should the current use change significantly then the value of the site in supporting marine and maritime industries could also change.)
- The site's characteristics and attributes for supporting marine and maritime activity both now and over the long-term
- The site's development constraints including viability issues
- The impact of the development proposals on the site's ongoing use and whether marine access or operations is likely to be inhibited or constrained in any way. (Over time the presence of residential uses on sites may undermine and constrain the operation of marine and maritime businesses due to complaints of noise, smells etc. which may typically accompany industrial practices. The implication could be that sites become less attractive and marketable for MM activity and their capacity is further eroded)

- Whether the development proposal requires a waterfront site
- The quantity and suitability of other sites in the local planning authority's area which could meet the proposal's need adequately
- The net additional benefits which the development proposal could deliver
- That current utilisation of a waterfront site may not be representative of medium or long term demand - the marine and maritime industry operates on a cyclical basis and commercial markets typically operate with a short term perspective
- That once a waterfront capacity is lost to non-B use classes it is likely to be lost forever.

6.2.4 Local authorities should also consider this study when updating their employment land reviews and in developing their spatial strategies. In particular this study should be a key evidence base to inform the development of the PUSH spatial strategy.

Monitoring and Updating the Sites Register and Awareness Raising

R2: The Waterfront Sites Register should be a live document that is updated on a regular basis. To ensure the register is kept up to date, ownership of register should be given to the Solent LEP who would (at least once a year) coordinate responses from local authorities of the Solent LEP area.

6.2.5 If agreed, the Solent LEP would ensure that the waterfront employment sites register is maintained and updated in collaboration with monitoring data provided by local authorities. As set out in R1, the site register is a valuable tool for planning policy makers, responding to planning applications / appeals. It can also be used for responding to inward investment queries and marketing sites to the business community. It is important to ensure that it remains up to date and relevant and as such should be updated on an annual basis. We suggest that this update is overseen by the Solent LEP, with support from their delivery panels and PUSH who will coordinate inputs from local authority planning and/or officers economic development.

6.2.6 As part of the management of the register, it is important that appropriate and sufficient monitoring mechanisms are embedded within the review process by the Solent LEP. Changes to waterfront employment sites through planning permissions should be monitored to ensure that a sufficient stock of waterfront employment land is available to accommodate businesses and activities within marine and maritime sector. Annual monitoring reports are likely to be the most appropriate frameworks for this monitoring and review exercise and data should be provided from relevant local authorities.

R3: To support R1 and R2, raise the profile of this study through a launch event to ensure that local authorities and relevant stakeholders are aware of the findings and recommendations.

6.2.7 A launch event would help highlight the importance of this work, how it could be used to support local authority planning policy and economic development teams, and make partners aware of the role they will play in the updating and monitoring of the register.

Engagement with Key Landowners

R4: The Solent LEP should continue to develop a working relationship with landowners of waterfront sites, particularly those who own large sites, to understand their plans for retention, release and development both in the short to medium term and over the longer term.

6.2.8 To supplement the monitoring process and updating of the sites register, the Solent LEP should continue to develop working relationships with key landowners within the Solent. This would help to forward plan and prepare for a site coming to market or to advise the land owner on positions in relation to planning applications for change of use.

6.2.9 There are a number of large land holders and companies active in the Solent area including ABP, MoD, Red Funnel, Wightlink, LaFarge, Oceanic Estates, MDL Marinas and Premier Marinas as well as a number of utility operators. These landowners own and operate a significant quantity of the waterfront employment sites, many of which have important marine infrastructure allowing unrestricted access to water. The Solent LEP should work closely with these key landowners to understand plans for the future development to accommodate MM activity, any release, or change in key assets / infrastructure. This study has identified a number of MoD owned sites which show reasonable prospects for use by marine and maritime businesses, some of which may come forward for release in the short to medium term. Examples include the Royal Clarence Yard Retained site and Marchwood Military Port. The retention of these sites for marine and maritime activities should be an immediate priority for the Solent LEP.

Importance of Large Waterfront Employment Sites

R5: The Solent LEP, in partnership with relevant planning authorities and key partners should carefully manage the provision of marine and maritime uses on large waterfront employment sites. In particular, attention should be given to those large sites which are currently vacant or have the capacity for large-scale change. Consideration should be given to their relative importance for accommodating marine and maritime activities and development briefs / planning applications for these sites should be carefully managed.

6.2.10 Across the Solent there are a number of large, well established waterfront employment sites which are currently supporting marine and maritime activities. In determining development proposals and planning applications for large sites, consideration should be given to the site's importance in the context of the Solent wide supply position.

6.2.11 In particular, any potential loss to the provision of large waterfront employment sites which support marine and maritime businesses (or have the potential to support marine and maritime uses) should be carefully considered as these may be critical to the strategic long term support of the sector. Sites such as Centenary Quay, Kingston Marine Park and the Daedulus Enterprise Zone have the potential for large scale change and have unique potential to support the sector. In addition the former Fawley Power Station site is a large waterfront site that could come forward for alternative use in the future and its scale and characteristics represent a significant opportunity for marine and maritime uses. These sites could accommodate a range of business sizes, activities and offer unique collocating / on-site clustering opportunities which smaller dispersed sites cannot. Development of these sites is likely to be incremental so a clear, carefully masterplan / development brief, which supports the site's long term vision and real potential needs to be set in place and pursued.

Investment Opportunities

R6: The waterfront employment sites register should be utilised by the Solent LEP and partners as a starting point for identifying sites and areas for investment. Where opportunities are identified for public sector investment, a Green Book compliant business case should be undertaken supported by an appropriate due diligence assessment and commercial market testing.

6.2.12 Investment to improve or maintain access to water, such as improvements to the integrity / strength of quay walls and dredging of channels as well as improvements to flood defence was observed across a number of sites (for example sites on the Itchen west and east bank).

6.2.13 Were the public sector able or willing to invest capital to forward fund infrastructure works to unlock or improve sites, the sites register could be used to draw up a short list of potential investment opportunities with priority given to those sites identified as Tier 1 and Typology theme 'Invest and Grow' or 'Consolidate/Transition'.

6.2.14 Key questions should then be asked taking into account the site's characteristics relative to other locations across the Solent area, in particular: 1) why is public sector investment needed (i.e. why is the private sector not delivering and what is the nature of market failure, / what is the 'but-for' case); 2) what is the evidence for a good cost to benefit ratio (i.e. can you be sure that any public sector investment will be more than paid back over a suitable time period); and 3) what is the evidence that the investment will contribute to a net economic benefit, taking into account any potential economic displacement effects/impacts over a suitable time period.

6.2.15 Before any capital investment is made, and to answer these questions, a business case compliant with HM Treasury Five Case Model and Green Book guidance should be undertaken.[17]

6.2.16 Where opportunities are identified, appropriate due diligence should be conducted prior to investment to ensure that constraints such as land quality, contamination and environmental constraints are considered. In addition market testing should be undertaken to ensure that there is clear commercial appetite for the site. This will ensure returns on investment are de-risked and maximised.

Shared Water Access and Facilities

R7: We recommend that the Solent LEP promote opportunities to create shared assets for marine and maritime businesses which require access to water. These facilities may form part of the creation of marine enterprise hubs.

6.2.17 The Transforming Solent – Marine and Maritime Supplement report recommended that three marine enterprise hubs should be established across the Solent to help drive inward investment and provide incubation support for high value marine manufacturing enterprise. This recommendation builds on this concept and suggests marine enterprise hubs should have access to shared assets allowing access to water for the marine and maritime businesses located on-site.

[17] See HM Treasury (Nov 2014) 'The Green Book: appraisal and evaluation in central government' (Nov 2014); and HM Treasury (2013) 'Public Sector Business Cases: Using the Five Case Model, Green Book Supplementary Guidance on Delivering Public Value from Spending Proposals'

6.2.18 Consultation and site surveys identified a distinct lack of sites across the Solent with incubator and grow-on space for marine and maritime enterprises. Start up and small businesses struggle to find sites at affordable rental levels which have small premises and access to key assets such as lifting equipment (e.g. boat hoist), slipways, pontoons, berthing facilities and covered servicing areas (and ideally a number of these assets).

6.2.19 The site register should be used by the Solent LEP to help inform the site selection process to identify waterfront sites which have development potential to accommodate marine enterprise hubs.

Suggested Next Steps

R8: To complement this research which has focussed on the supply of waterfront sites, we recommend that work is undertaken to assess the long-term demand for sites in the Solent area with details on scale, nature and location. This would allow site specific recommendations to be made on potential quantity of waterfront land to be protected over the long term.

6.2.20 To arrive at a more definitive position on the protection of waterfront sites across the Solent area, a demand projection for waterfront employment sites over the long term (20 years) should be undertaken.

6.2.21 Demand could be compared against the supply side position set out within this study. Recommendations on the potential retention or release of specific sites could then be made drawing upon information on site characteristics, constraints and opportunities contained within the waterfront employment sites register.

R9: Safeguarding of Key Waterfront Sites

6.2.22 It is recognised that currently there is not a high enough level of protection afforded to waterfront employment sites within the Solent area. This makes sites vulnerable to redevelopment for alternative uses particularly if local planning authorities are unable to fight planning appeals. There is a concern that over time this may result in an erosion of waterfront sites which will endanger the Solent's ability to cater for the growing marine and maritime sector.

6.2.23 We suggest that re-development proposals for key waterfront employment sites should only be accepted where it can be demonstrated that the site is no longer viable or capable of being made viable for marine and maritime employment activities. Similar to the policy framework set out for the protection of safeguarded wharves within the London Plan, the viability of a waterfront employment site should be considered with regards to its; geographical location and proximity to markets, site attributes such as size, navigational access, site constraints and existing marine and maritime assets and the location and availability of capacity at comparable alternative sites based on a detailed demand assessment.

6.2.24 The Solent LEP should consult with the DCLG to determine whether a more robust level of protection could be adopted for sites of prime importance (Tier 1) to protect them for ongoing use by marine and maritime businesses. This process should include liaison with each of the local authorities, drawing upon the findings of this study and, if undertaken, the detailed demand assessment (R8) to provide justification those sites for protection.