

# Solent Local Industrial Strategy Consultation Session Summaries



## Solent Local Industry Strategy

# Isle of Wight Working Session

Date	14th May 2019
Attendees	18

### Summary:

This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders on key themes within the area, focusing on opportunities, challenges and future prospects. The main challenges for the island identified by attendees included barriers to market opportunities on the mainland due to the additional time and financial costs associated with travel. With this in mind, attendees noted that exceptional digital connectivity is a priority. However, the Isle of Wight is home to numerous market-leading micro-businesses, which should be nurtured to help them reach their potential. There should be a focus on hiring younger and local people to help meet labour demand and future growth. High quality training needs to support local recruitment and CECAMM was identified as a positive investment. The (at the time, potential) biosphere status was seen by attendees as a key opportunity to underpin the Island's visitor offer.

### Place-based Assets:

- Strong performing sectors in wind turbine/composites, visitor economy and marine & maritime, with an increasingly strong tech sector.
- Skilled older workforce
- “Biosphere” status could provide an important opportunity to transform and re-focus the visitor offer.
- High quality of environment and coastline.
- There is a high concentration of innovative/creative firms.

### Opportunities:

- The clean growth and green economy offer key opportunities to secure growth and raise levels of innovation and transition the visitor economy offer.
- Promote the rich and illustrious marine & maritime heritage of the region.
- Encourage small start-ups and creative sector to base themselves in the IoW, leveraging off the high quality of life.
- Fully utilise skilled older workforce that have specialisation in key clean / green technology fields.
- Build on the burgeoning Island tech sector.

### Challenges:

- There is a high level of second and holiday homes and there is also a lack of housing for certain groups e.g. key workers and young people.
- Housing affordability, whilst lower than other parts of the Solent, remains a challenge for younger people on the Island.
- Educational attainment is perceived as lower than the average, there is a need to align courses with local industries and employers as is happening at CECAMM.
- Ageing population of the Island.

### Vision:

- Seen as extremely attractive to start-ups and a pilot area for digital developments and tackling climate change.
- IoW to pioneer clean growth opportunities
- The Solent is seen as an area that is very well-placed to respond to climate change, innovating approaches to mitigate impacts and exporting these.
- The Solent as an excellent example of urban coastal living.
- A flourishing creative and arts sector.

# New Forest Working Session

Date	16th May 2019
Attendees	32

## Summary:

This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders on key themes within the area, revolving around opportunities, challenges and future prospects. Whilst the session aims to cover the whole of the Solent, attendees broadly focused on the New Forest area and its role within the Solent economy. Stakeholders highlighted the desire to enhance the New Forest as an attractive place to live, visit and do business. There is ample scope to promote environmental-tourism as well as innovative environmental research, and the area is well suited to host both. Physical and digital connectivity are the main areas of challenge for the New Forest, addressing these will increase inclusive growth across the area and for the region as a whole, and enable the areas to leverage off the high quality of life it can offer. The ageing population profile of the New Forest was noted as an area of focus.

Attendees expressed a real sense of pride of the area and are ambitious and positive about the future and the role of the New Forest in the economy. It was noted by some that there is a need to engage with more businesses in relation to the development of LIS, and specifically micro-businesses and SMEs.

## Place-based Assets:

- There are world class micro-businesses based in the area
- There is a large number of businesses in the New Forest, more than Southampton
- Natural capital, including the coastal waterside locations, and the New Forest National Park are key UK assets and are a prominent feature of the Solent's distinctiveness.

## Opportunities:

- Lead green technology growth.
- The Waterside area represents a significant opportunity to support sustainable economic growth through new infrastructure, homes, training and employment opportunities.
- Promote the visitor economy, leveraging off the New Forest's natural beauty and key visitor attractions.
- Encourage the move to electric cars, the area is well equipped to lead the way.

- Support the growth of innovative and high tech businesses.

#### Challenges:

- An ageing population
- Infrastructure is a key challenge, the A326 is a particular congestion hot-spot.  
There is no passenger rail service along the Waterside
- Broadband and mobile connectivity need improvement to support economic growth
- The cost of housing is high and there is limited choice
- Retaining talent

#### Vision:

- An area of the Solent that promotes its natural assets whilst also encouraging sustainable clean growth
- An innovative area that is highly connected (digital and physical) and that supports micro-businesses with incubator and collaboration spaces.

# Southampton Working Session

Date	16th May 2019
Attendees	41

## Summary:

This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy. The purpose of this session is discover and explore local perspectives and insights on the future of the region, with the views from this session being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders on key themes within the area, revolving around opportunities, challenges and future prospects. Becoming a pioneer in zero carbon / green technologies; improving access to the waterfront; encouraging cruise visitors to explore the city and wider area; and supporting small business growth, through incubator hubs etc were highlighted as key opportunities by attendees. Transport connectivity, particularly to Portsmouth, was highlighted as a key infrastructure challenge to economic growth.

## Place-based Assets:

- Significance of Southampton Port as an important gateway for the transportation of people and goods.
- Important historic UK cruise hub
- University of Southampton and Solent University are two renowned universities
- National Oceanography Centre, a renowned centre for research, teaching, and technology development in Ocean and Earth science

## Opportunities:

- Southampton Port is a key export hub that offers a great opportunity for growth through stimulating the development of new marine & maritime technologies
- The waterfront area is a distinctive asset that could be better utilised through improved connectivity, particularly for the benefit of residents, businesses and the visitor economy
- Improve rail connections between Southampton and Portsmouth would help to stimulate increased economic activity
- Capture more cruise visitors to visit Southampton and the wider area (e.g. encouraging visitors to stay for the weekend to explore the city rather than passing through it)
- Incubator hubs that help accelerate the development of new and start-up companies



- e.g. increasing incubation space, entrepreneurship support and technical facilities
- Strong knowledge base in zero carbon technology - Southampton could be the city to deliver this agenda.

### Challenges:

- Transport connectivity is poor, particularly to Portsmouth and the Poole / Bournemouth conurbation.
- Skills shortages; need to create strong linkages/ interactions between universities and industries.
- There is a lack of obvious access to the sea, this should be improved given Southampton is a coastal city
- Space to grow is a challenge with available office space declining in recent years
- Need to attract and retain a younger generation in the area

### Vision:

- Southampton as a major centre for marine & maritime and environmental technology, become a leading pioneer in sustainable technologies and green industries.
- A clean, green city with a thriving economy, demonstrating its commitment to significantly improving air quality within the city e.g. Green Charter
- Invest in the waterfront area to create an improved balance between port and leisure.

## Solent Local Industry Strategy

# Transport Working Session

Date	17th May 2019
Attendees	24

### Summary:

This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy. The purpose of this session is discover and explore local perspectives and insights on the future of the region, with the views from this session being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders on the future of mobility and connectivity within and to/from the Solent, recognising that the area has a range of complex connectivity considerations including:

- Its role as a strategic trade gateway for the UK, with Southampton being the primary UK export port, automotive hub, and the primary European cruise port.
- Ro-Ro traffic through Portsmouth International Port
- HM Naval Base Portsmouth - the home of the Royal Navy, with UK wide supply chains
- Two major cities and a constellation of larger towns along the M27 corridor
- A coastal geography, with three islands, three peninsulas, and a limited number of crossing points
- A sub-standard rail network, making the private car the default choice.

Attendees noted a range of pressing connectivity issues including city to city (particularly by rail), access to the airport from the east, slow train times from Portsmouth to London. It was acknowledged that there is scope to strengthen existing transport networks and making use of the waterways paired with green technology to push the region's clean growth potential. Attendees were keen that the area pioneers new mobility approaches and would like to explore the potential for the Solent as a test bed for water transport (and potentially autonomous water transport) and drone solutions. Attendees noted that exceptional digital connectivity is required to mitigate the need for trips, and the need for planning to bring forward livable places, where people live and work in close proximity.

### Place-based Assets:

- The Solent has highly productive ports that have specific geographical advantages for trade and are major assets for the Solent and UK economies.
- The Solent is a coastal area with unique geography, where an intensely urban and industrial landscape sits alongside a world-class environment.
- The Solent waterways provide an under-utilised resource for the local movement of people and goods



## Opportunities:

- High levels of self-containment shows that this is an attractive place to live and work
- Commuting is a high contributor to air pollution - there is the opportunity to invest in clean transport - an app showing live data could support cutting congestion and supporting better informed mobility choices.
- The area benefits from a high quality bus fleet.
- The topography of the area is flat and the climate is good - this can support increased use of sustainable transport modes (such as walking and cycling).
- Increasing the active use of Solent's waterways for moving people and goods around - particular potential for marine autonomy, leveraging off local research and innovation in this field.
- Reimagining our coastal communities with strong digital connectivity

## Challenges:

- There is very poor East-West rail connectivity generally, and specifically between Southampton and Portsmouth, and between the Airport and the East. There is a strong view that the economy would benefit from improved East/West public transport connectivity.
- Regional geography is challenging - with a number of estuaries funneling journeys through a small number of crossing points. In addition, the south is bounded by water and there are a range of islands and peninsulas.
- Rural transport can be costly.
- Air quality is a particular issue in our cities.
- There is a need for transport to play a key role in supporting efforts to reduce greenhouse gas and carbon emissions.

## Vision:

- An area that is at the forefront of innovative options such as drone corridors or autonomous pods
- Streamline urban transport options under a single transport body
- A vibrant destination to encourage students to work in the area post-studies
- Introduce more clean technology such as shore to ship power to enable our ports to play their part in supporting the greening of the economy
- Encourage compact living – city / town centre living, reducing the need for car trips and increasing opportunities for sustainable trips.
- An area that is highly connected and where the cities connected by a fast and reliable public transport service
- An area that pioneers the use of water based modes to move people and goods around.
- A regions that continues to provide a trade and passenger gateway for the UK economy.

# Portsmouth Working Session

Date	20th May 2019
Attendees	43

## Summary:

The purpose of this session is discover and explore local perspectives and insights on the future of the region, with the views from this session being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders on key themes within the area, revolving around opportunities, challenges and future prospects. Making advanced technology more available to small businesses and encouraging students to stay within the city and wider Solent were highlighted by attendees. The area, and specifically, the cities were seen as key areas to support urban living with people living and working in a defined geography, reducing the need to travel. Addressing key infrastructure challenges (most notably transport and flood defence) were highlighted by attendees as key enablers of economic growth.

## Place-based Assets:

- The Port of Portsmouth was recognised as a major port for roll-on-roll-off (ro-ro) and trade activities
- HM Naval Base Portsmouth is of strategic importance and sits at the heart of the Solent's defense cluster.
- Portsmouth is densely populated and so presents specific opportunities for sustainable living.
- Portsmouth is well-connected with its coast, and Gunwharf was identified as a key example of this that attracts people from a wide geography.

## Opportunities:

- Could improve transport by introducing a single transport body to manage the Solent region. This recognises that there are movements within the functional economic area of the Solent that do not reflect traditional local authority boundaries.
- Advanced manufacturing and engineering are strengths of the area - key businesses such as IBM, Airbus Defence and BAE noted.
- Investment in state of the art coastal defence could provide an opportunity for the Solent to be a global market leader in urban coastal living and responding to climate change.
- Brownfield sites could be used for businesses or repurposed for the visitor economy, leveraging off the strong connection with the Waterfront.

- Scope to strengthen the visitor economy, leveraging off the heritage of the area.
- Opportunity to attract more cruise visitors to explore the area and wider region.
- The creative sector is emergent and growing and has strong potential to diversify the economy.

### Challenges:

- Flood risk and coastal erosion poses a challenge to economic growth.
- Pollution (including air quality) is an issue that threatens quality of life.
- The shellfish industry is suffering from poor water quality.
- Small businesses are struggling due to lack of access to appropriate sites and technologies
- Transport connectivity poses a challenge, particularly within the city. Rail connectivity between Portsmouth and London was seen as a weakness.

### Vision:

- To develop a free public transport system in and between cities making use of electric buses.
- Showcase Portsmouth (and the wider Solent) as an exemplar sustainable coastal community.
- A prosperous coastal city, offering a high quality of life.
- A multi-modal transport loop connecting Southampton, Portsmouth and IoW.
- Develop and encourage stronger links between academia and businesses.

# Disruption Working Session

Date	22nd May 2019
Attendees	47

## Summary:

This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy.

The purpose of this session was to discover and explore local perspectives and insights on the future of the region, with the views from this session being used to support the development of the Solent Local Industrial Strategy. PwC's Leo Johnson set the scene, hosting a discussion around the global megatrends and emerging technologies that will shape the 'Future Solent' and this was used to support a consideration of the impacts of these future scenarios, mapping the landscape of technological and trends-based disruptions to the Solent region.

Utilising disruption wildcards, along with a successful jam session, attendees highlighted various future-focused project ideas and opportunities for the region. The quality of life and well-being within the Solent came through strongly. The quality of life available in the Solent was seen as a key asset and feature on which growth opportunities should leverage, but that strong digital connectivity is required to underpin this. Participants saw this as helping to attract and retain top talent, supporting increased levels of innovation.

## Place-based Assets:

- The Solent is home to strong educational institutions and industry, providing specialisms and expertise of global significance in a range of sectors including: marine & maritime, clean / green economy.
- There is an abundance of natural assets that can support economic growth opportunities. The natural capital of the areas is a key strength and distinctiveness.

## Opportunities:

- Better connect businesses with educational institutions, businesses could use a platform to log the skills in highest demand in the near future.
- Resident well-being should take priority, regeneration of coastal communities such as Gosport, the Waterside and Isle of Wight is important to support increased prosperity and productivity.
- The quality of life and environment within the Solent is unique, harnessing it will attract world-class talent and boost already high investment.
- Merging the creative sector with new technologies could provide the Solent with

- opportunities for growth.
- Attendees felt the Solent has the potential to be a test bed for new technologies, and has an innovative and pioneering spirit.
- The Solent is a global maritime cluster and there are specific opportunities to pioneer new technologies within marine and maritime.

### Challenges:

- Up-take of new technologies requires approval from central government (e.g. regulation), which can halt pace.
- Solent has an ageing population with a steep increase in the people aged over 85
- While the region should embrace new technologies, there is a need for central government to support critical infrastructure to respond to pressing challenges impacting on growth - e.g. flood defense and transport connectivity

### Vision:

- The Solent has an extremely high quality of environment, yet with intensely urban and industrial areas sitting side by side - we need to celebrate this diversity and export it.
- 100% digital connectivity coverage including through 5G
- Closing the skills gap through closer collaboration between academia and industry need
- Become a location that attracts top talent due to the high quality of life, these people will consequently drive the Solent's economy to the forefront of research and innovation.

## Solent Local Industry Strategy

# Coastal Renaissance Working Session

Date	23 <sup>rd</sup> May 2019
Attendees	12

This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy. This working session aimed to gain the insight of local stakeholders regarding "coastal renaissance", revolving around opportunities, challenges and future prospects. Stakeholders crossed a wide range of interest groups from business, environment, local government and tourism. The overriding feature of the session was the ambition for Solent to become a model for coastal-urban living.

### Place based assets:

- There is an abundance of natural capital in the Solent area, which makes it an attractive place to live and work. IoW, New Forest and the waterways are significant environmental assets.
- Key industry sectors- marine and maritime, high tech, MOD and specialist defence, tourism and natural environment.

### Opportunities:

- Promotion of creative industries in niche locations/waterside to develop some "cool" locations - attractors for "great place to live and work" and for the visitor economy.
- Marine - key component of work and play
- Use natural environment - IoW - potential biosphere status, New Forest- both near London - as basis for developing "wellbeing" proposition, clean growth.
- Look at different industries that can leverage our place based assets. e.g. shellfish industry could equate to 20% of national output if the nitrate issue is addressed.
- Unlock MOD sites for creative and imaginative development - use the attractor of the waterside, where possible, make green space within them.
- Develop attractive access to the waterfront, especially in Southampton
- Utilise our waterways differently to mitigate the challenge of the transport infrastructure - water taxis for work and play.
- Become a leader in supporting the ageing population in new (technological) ways.



**Challenges:**

- Infrastructure challenges, which will be exacerbated by growth if not tackled:- road and public transport, public water supply, digital connectivity, medical and social care.
- Flood risks
- Water contamination from farming activities outside the Solent LEP catchment area.
- Significant investment for MOD decontamination if these sites are to be unlocked.
- Limited waterfront accessibility - especially Southampton
- Safeguarding unique natural environment

**Vision:**

- A model for coastal-urban living rich in innovative practices for living and working within a special natural environment.
- Develop a joined up approach to the challenges and opportunities not just on the basis of local districts.
- Oslo as a model

## Solent Local Industry Strategy

# Voluntary, Community and Social Enterprise Working Session

Date	28 <sup>th</sup> May 2019
Attendees	26

This working session aims to gain local stakeholders' insight on key themes within the area, revolving around opportunities, challenges and future. This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders from the Voluntary, Community and Social Enterprise sector, revolving around opportunities, challenges and future prospects. The session brought out the social impact that the sector brings to the economy and the potential it has to reduce inequality if appropriately funded, which was expressed as a need for a dedicated social enterprise fund within the LEP area.

There was a strong appetite from the sector to play a full and active role in supporting economic growth in the Solent and ensuring that all have an opportunity to share in prosperity.

### Place-based Assets:

- The three universities have positive spill-overs for local communities and economies
- High tech industries, defence, marine/ports - business and pleasure. Hospital.
- Environment - IoW, National Park, coast are major assets for the area and have potential to support wellbeing.

### Opportunities:

- Solent has a strong potential to be a test bed for government initiatives on a range of opportunities including social enterprise as a model to reduce inequality.
- Solent as a leader in the development of the green economy/recycling including, delivering smart buildings that produce less emissions and ports adopting clean fuel alternatives and increased efficiencies.
- Explore opportunities in the care sector (financial/social), particularly harnessing technology. Elderly people have valuable skills and contributions to add to the region - a strong latent asset. Need to look at measure to harness this potential.
- Raise the aspirations of the younger generation, provide more career coaching opportunities and soft skills development.

### Challenges:

- Low aspiration and inequality has not been seriously tackled. Solent cities - not presenting the most vibrant and ambitious image. Health, housing, air quality impact well being
- Added value and diversity of the sector is not understood and thus access to funding is difficult.
- Silos and duplication in the sector - strong identities related to place.
- Physical infrastructure makes networking within the sector difficult.

### Ambition:

- Social enterprise as a mainstream sector, where the social impact is measured along with its added value e.g. savings for NHS.
- Pilot use of UN wealth/health index as a measure of economic output.
- A local, dedicated growth hub for social enterprise, signposting and funding to underpin its mainstream function.

## Solent Local Industry Strategy

# Visitor Economy Session

Date	10 <sup>th</sup> July 2019
Attendees	23

This working session aims to gain local stakeholders' insight on key themes within the area, revolving around opportunities, challenges and future. This is a high level summary of the feedback from the consultation session. Detailed notes of the session were taken and are being used to support the development of the Solent Local Industrial Strategy.

This working session aimed to gain the insight of local stakeholders from the Voluntary, Community and Social Enterprise sector, revolving around opportunities, challenges and future prospects. The session brought out the social impact that the sector brings to the economy and the potential it has to reduce inequality if appropriately funded, which was expressed as a need for a dedicated social enterprise fund within the LEP area.

A major theme that arose from discussion was the need to unify the diverse, plentiful visitor economy offering of the region as a whole. Stakeholders considered that a unified approach would help to focus attention on improving connectivity and marketing activities in the region. The maritime heritage was seen as a unique opportunity for the Solent.

### Place-based Assets:

- The Solent benefits from a unique combination of attractions / offerings that the visitor economy can engage with, access to London is important. The maritime heritage is a key and distinguishing component of this.
- There is an opportunity to create a strong purposeful narrative around the attractions / offerings of the region, particularly focusing on the marine & maritime strengths.

### Opportunities:

- Identifying the target visitors for the region (international) and then focusing on improvements to attract them e.g. increasing region-wide accessibility, awareness, better hotel facilities
- Opportunity to shift focus to "active wellness" as a proposition and a higher quality product
- There is the opportunity to market the area more effectively, particularly focusing on social media highlighting major events and developing sustainable new major events.
- The increasing volumes of cruise passengers is a huge opportunity for the areas and more needs to be done to encourage cruise passengers to incorporate local attractions / assets within their holiday.
- The Solent's world class environmental assets - particularly the New Forest National Park and the Island Biosphere are specific opportunities for the Solent visitor economy.

### Challenges:

- Branding - how best to approach identity. Lack of understanding of what is on offer in the different local areas.
- Organisations work independently and compete rather than working together towards a common goal that can benefit all parties
- There is a disjointed transport offering (interlocking timetables), especially between Southampton, Portsmouth and the Island - Integration could be better to help support movement around the attractions of the Solent.
- Challenges around how to best to keep increasing numbers of cruise visitors within the area.
- Skills -impact of Brexit on staffing

### Ambition:

- A connected destination with strong thematic offer delivering a quality customer experience
- Growing time spent by target visitors in the area rather than purely attracting more visitors