

Promoting and nurturing investment and growth in the Central South UK

# PROSPECT

Issue 2 | [CentralSouth.co.uk](http://CentralSouth.co.uk)



*Ships and Red Arrows over The Solent © Cunard*



The Central South contributes over £119bn to the UK economy.

"Sitting at the heart of the Central South, Hampshire is one of the most beautiful places in the UK and regularly appears in best places to live surveys. It is also home to one of the most significant regional economies, incorporating key sectors such as aerospace and marine, and the operations of major global players such as BAE Systems, IBM, Exxon Mobil, Zurich and Gulfstream."

**David Fletcher**

Assistant Director – Economic Development, Hampshire County Council



# WELCOME

## Welcome to the Central South, the UK's global gateway.

As Group Chief Executive of Business South, the independent representative of businesses in the Central South of the UK, it is my job and responsibility to extoll to you the virtues of our wonderful and unique location in the South of England. I do this, not just from a business and practical perspective, but also from a human perspective, as a resident of the region who is proud to come from a place that is environmentally beautiful, economically dynamic and has an innovative energy and robust solidarity.

You will find throughout our Prosper magazine, practical and economic examples of why the Central South is an excellent place from which to do business, from our superb transport connections to our sector strengths along with exciting development projects and international regeneration opportunities. But it is the human elements that make our region one that you can truly connect with. The Central South is working in unanimity to make not just the individual business, but the whole economy a success.

Working together to ensure that we are future ready, regenerating sustainably to protect the environment, heritage and history that defines us. You will see in the articles from our partners throughout this publication the passion and expertise that they share for our region, a place where residents, companies and investors enjoy an exceptional quality of life in one of the best climates in the UK.

**The Central South UK is future ready, be part of our future.**



**Leigh-Sara Timberlake**  
Group Chief Executive, Business South

*PROSPER and Central South are delivered by Business South*



# FOREWORD

2020 heralds a new chapter for the UK as we leave the European Union and embark on a new global journey as an independent trading nation.

Our newly elected Government has a strong mandate to chart a new course internationally and ensure policy is in place to level up trade, investment and regeneration opportunities across our regions.

A focus on regional strategy and collaboration underpins the participation of Central South at MIPIM 2020. It presents an opportunity to position the region as a global champion of commerce, research and innovation.

As the communication specialist for the built environment, BECG is delighted to be working with public and private sector partners involved with the Central South consortium to showcase our region and shared vision.

Together we are the region's single voice; championing our expertise and common experience and ensuring the region benefits from a stronger profile both within the UK and with global partners.

The Central South region embodies the very best of the UK and is critical to the UK's future success. Our ports connect the UK to the world. Our universities are

centres of innovation and world-class research. Our investment in advanced manufacturing and the digital technologies of the future, together with our economic heritage in defence, aerospace and maritime industries, all mean that this region plays a fundamental role in the UK's prosperity and international competitiveness.

With three waterfront cities, two National Parks and historic England's first capital; our coastal location is central to our success, as are our excellent road, rail and air connections to London and rest of the UK. The Central South is the home of the Royal Navy and critical defence and technology industries as well as being gifted with a superb natural environment from the Isle of Wight to the New Forest and the South Downs. This is where economic success and social inclusion combine. It is a place where protecting and enhancing the environment go hand in hand with developing our maritime heritage and investing in tourism and hospitality.

As the gateway to the world's fifth largest economy, the Central South has a key role to play in positioning the UK on the international stage. BECG is proud to play its part in promoting all that this superb region has to offer.



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**Andrew Howard**  
Managing Director, BECG



# OUR LOCATION

The UK is the world's fifth largest economy. It offers a robust, business-friendly environment to reliably expand, trade and invest.

The Central South is located on the south coast of the UK, less than one hour from London. A global gateway with vibrant waterfront cities and rich heritage, surrounded by remarkable nature and coastline.

### New Forest National Park

Once a royal hunting ground for William the Conqueror, the New Forest National Park covers an area of 566 square kilometres and is made up of vast tracts of unspoilt woodland, heathland and river valleys with deer, ponies and cattle roaming free.

### Isle of Wight

Largest island in England. Location of the Isle of Wight Festival and Cowes Week and home to wind turbine manufacturer Vestas.

### Andover

One of the most sought-after logistics locations in the UK and home to some well-known established brands including Co-operative Group, Rich Products, Stannah and Twinings.

### Basingstoke

Home to global brands like Sony, Barclays, De La Rue and Virgin Media and more than 6,000 businesses. 30 minutes from the M25 London Orbital Motorway and 45 minutes from Heathrow Airport.

### Farnborough

Aerospace cluster and heritage - major companies include BAE Systems, Airbus, QinetiQ and Fluor. Home to the most modern and efficient business aviation airport in Europe. 34 minutes from London by train. Europe's largest aviation trade show, the Farnborough International Airshow, takes place biannually.

### South Downs National Park

Confirmed as a National Park in 2009, the stunning landscape of the South Downs stretches from Winchester and Petersfield in Hampshire to Eastbourne in East Sussex.

## HAMPSHIRE

## WEST SUSSEX

## DORSET

### THE SOLENT

### Winchester

County town of Hampshire and historic capital of England. Visitor attractions include the Great Hall and Winchester Cathedral. Excellent connectivity to London. High-profile employers including Arqiva, Simply Health, IBM, HSBC, NATS and Zurich.

### West Sussex

One of the UK's most diverse counties, West Sussex covers both coast and the South Downs National Park. The county has an exceptional blend of innovative, international and national companies.

### Bournemouth

Large coastal town with seven miles of award-winning beaches and an international airport. Fast growing digital sector.

### Southampton

Major commercial centre for the Central South with a strong maritime heritage. 3rd Highest ranking city for good growth in the UK. Home to the UK's number one vehicle handling port, Europe's leading turnaround cruise port and the UK's most productive container port.

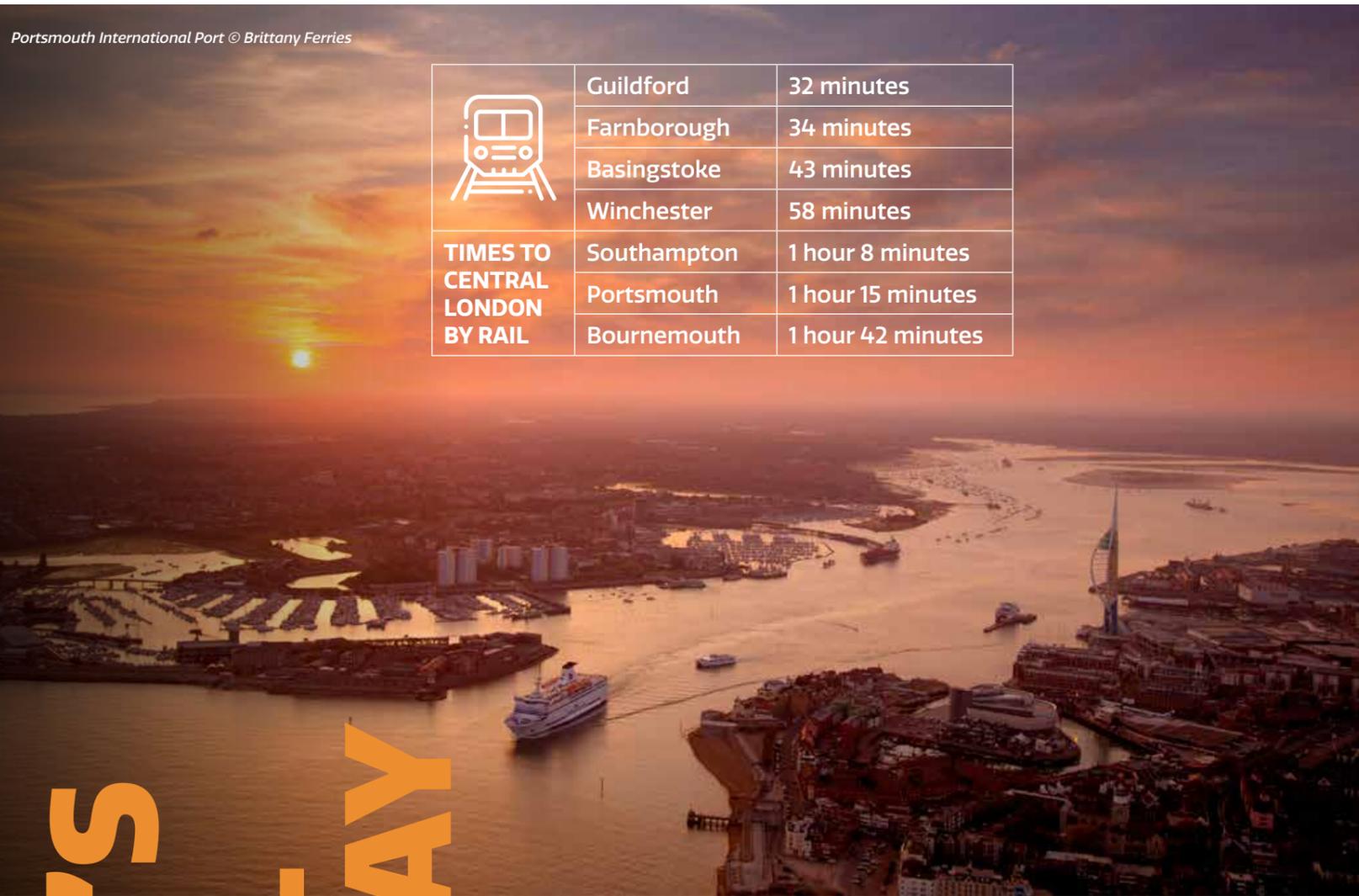
### Portsmouth

Proud home of the Royal Navy and an historic maritime city steeped in heritage. A multi-billion-pound transformation programme is underway positioning the city as a globally significant hub for innovation, technology and creativity.

### Chichester

Cathedral city located at the foot of the South Downs National Park. The University of Chichester has specialisms including Humanities, Sport, Musical Theatre and Education.





# THE UK'S GLOBAL GATEWAY

Portsmouth International Port © Brittany Ferries

 <b>TIMES TO CENTRAL LONDON BY RAIL</b>	Guildford	32 minutes
	Farnborough	34 minutes
	Basingstoke	43 minutes
	Winchester	58 minutes
	Southampton	1 hour 8 minutes
	Portsmouth	1 hour 15 minutes
	Bournemouth	1 hour 42 minutes



© Farnborough Airport

## The Central South is the UK's global gateway, connected by road, rail, air and sea.

The Central South has two of its own international airports at Southampton and Bournemouth and Europe's leading business airport located at Farnborough. The region has easy access to London's airports with connections to all international terminals at Heathrow from just 30 minutes away and Gatwick 1 hour.

Direct flights to and from Southampton Airport include Amsterdam, Paris, Belfast, Glasgow and Verona. Direct flights to and from Bournemouth Airport include Geneva, Dublin, Faro and Alicante.

2 major motorways connect the Central South by road, the M3 to London and the M27 connecting Portsmouth and Southampton.



Port of Southampton © Southampton City Council

There are direct sea ferry connections to Europe from Portsmouth and Poole. Portsmouth International Port is Britain's most successful municipal port with excellent motorway access. The Port of Southampton is the UK's number one vehicle handling port, Europe's leading turnaround cruise port and the UK's most productive container port.

© NATS Swanwick Centre



# CHOOSE THE CENTRAL SOUTH UK AND YOU'LL BE IN GOOD COMPANY

Global corporations located in the Central South

*With thanks to the Economic Development team at Hampshire County Council for provision of background economic research.*

## MARINE & MARITIME



- L3Harris
- ABP
- DP World
- Carnival
- Red Funnel
- Wärtsilä
- Griffon Hoverwork
- QinetiQ
- Babcock

## AEROSPACE & DEFENCE



- Gulfstream
- BAE Systems
- Airbus
- NATS
- Boeing Defence
- Lockheed Martin
- GE Aviation
- Pall Europe LTD
- GKN

## FINANCE & INSURANCE



- Zurich
- HSBC Bank
- JP Morgan
- Discover Financial Solutions
- Old Mutual Wealth
- De La Rue
- Starling Bank

## DIGITAL MEDIA & COMMUNICATIONS



- IBM
- Sony
- Virgin Media
- Garmin
- Ordnance Survey
- Arqiva

# SKILLS, THE FUTURE IS HUMAN

The Central South is home to over 79,000 students, 6 universities and several worldclass research centres. We have the human skills and research technology of the future.



University of Winchester © University of Winchester

*"As one of the region's largest employers, employing over 1200 people, many who live within the Central South region, it's important to us that the majority of our workforce are from the local area and that we, our staff and their families feel part of the local community. We're working hard to create a positive and productive working environment; an workplace that's inclusive and flexible so our people can bring their whole & best selves to work."*

**Jo Phillips**  
Chief People Officer, Carnival UK



University of Portsmouth © All Rights Reserved Helen Yates

### University of Southampton

Ranked as one of the leading maritime and engineering universities in the UK. The University's National Oceanography Centre, Southampton Marine and Maritime Institute (SMMI) and Boldrewood Innovation Campus, are at the forefront of global marine and maritime innovation.

### University of Portsmouth

Ranked the 21st best university in UK, Gold rated for teaching and is a world leader in astro-physics and brain cancer research. The Institute of Marine Sciences (IMS) is a key part of the university, and has been at the forefront of marine biology for over 70 years.

### Bournemouth University

More than 19,000 students and ranked as one of the top 200 young universities in the world.

### University of Winchester

Specialising in Arts, Business, Law, Education, Health, Humanities and Social Sciences. Shortlisted for University of The Year 2017.

### Solent University

Located in Southampton, known for its strong business, technology, media arts and music, and maritime courses. The University's Warsash Academy provides first class training, consultancy and research to the maritime industry worldwide.

### University of Chichester

The University of Chichester is located in West Sussex with campuses in the city of Chichester, the nearby coastal resort of Bognor Regis and an associate campus for commercial music on the Isle of Wight. The University's specialisms include: Humanities, Sport, Musical Theatre and Education.

*We power a global marine & maritime economy employing over 360,000 people.*

# INTRODUCING THE SOLENT

The sun shines on The Solent more than anywhere else in the United Kingdom. Coupled with this, the region has 340 miles of coastline, three islands and three peninsulas and two major international gateway ports.

With its rich maritime heritage, this all drives a powerful £5.5bn maritime economy and makes The Solent the beating heart of the world's marine and maritime sector.

Aside from the sea, there are two National Parks, including the New Forest, one of the largest remaining tracts of unenclosed pasture land, heathland and forest in Southern England; and the South Downs National Park, England's newest National Park. It encompasses the South Downs Way, spanning the entire length of the park and is the only national trail that lies wholly within a National Park.

Aside from the sea, there is the New Forest National Park, that contains one of the largest remaining tracts of unenclosed pasture land, heathland and forest in Southern England. Across The Solent region there are many miles of areas of outstanding natural beauty.

The Isle of Wight in the English Channel, between 2 and 5 miles off the coast of Hampshire, and is separated by the stretch of water from which the region takes its name: The Solent. The island has resorts that have been holiday destinations since Victorian times, and is known for its mild climate, coastal scenery, and verdant landscape of fields, downland and chines. The island is designated a UNESCO Biosphere Reserve.

An extremely cultural region, The Solent includes many annual festivals, exhibitions, and a number of acclaimed theatres and sporting events including the America's Cup.

[solentlep.org.uk](http://solentlep.org.uk)



Portsmouth by night  
© Shaun Roster photography

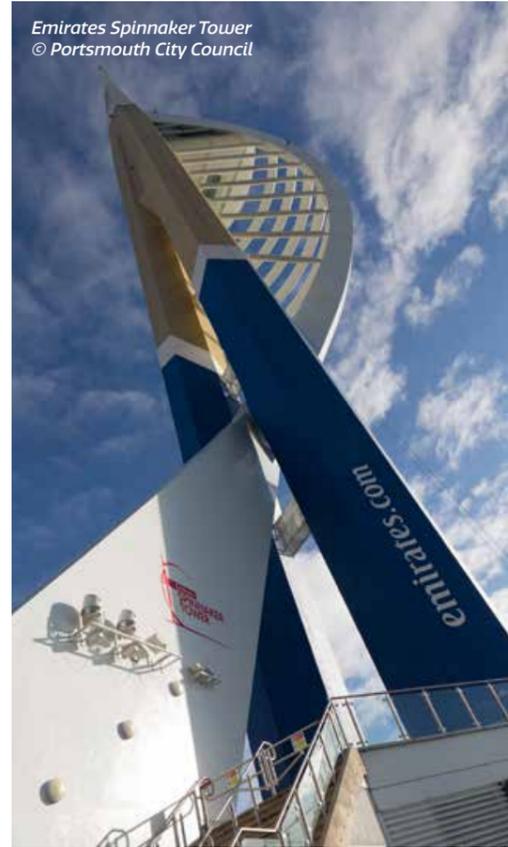
# PORTSMOUTH, THE GREAT WATERFRONT CITY

## A Global Marine and Maritime Hub

Portsmouth Naval Base is home to the UK's brand new £6.2bn aircraft carriers and two thirds of the Royal Navy surface fleet and supports 20,000 jobs; generating £1.6bn of GVA.

Portsmouth is also a global centre for marine and maritime, aerospace, defence, creative and digital industries, leading the way nationally in the development of advanced manufacturing and engineering. The City Council's determination to help businesses to grow and thrive was recognised when we won the FSB's Most Business-Friendly Council award in 2019.

Emirates Spinnaker Tower  
© Portsmouth City Council



The dynamic and vibrant coastal city of Portsmouth is situated in the most prosperous region of the UK – just 70 miles from London and 90 minutes from Gatwick and Heathrow airports.

The city is the proud home of the Royal Navy and an historic maritime city steeped in heritage. Portsmouth is also fiercely ambitious and forward thinking with a multi-billion-pound transformation programme already underway that is positioning the city as a globally significant hub for innovation, technology and creativity.

## Sitting at Europe's Top Table

Portsmouth is one of the best-connected cities in Europe served by excellent road and rail links and a busy international ferry port with frequent services to France and Spain.

With a population of 215,000 people the city is home to 7,880 businesses including global heavyweights Airbus Defence and Space, Babcock, BAE Systems, Capita, IBM, Pall Europe, QinetiQ and Wartsila.

Last year business growth hit 4.7%, 70 new businesses were established and 4,000 new jobs were created in the city.

Portsmouth's GVA has reached £5.7bn and the city's GVA-per-filled-job of £47,995 places it in Europe's top 20 cities. GVA grew by 3.6% last year – the fastest rate for any city in the south of the UK.

## In the International Spotlight

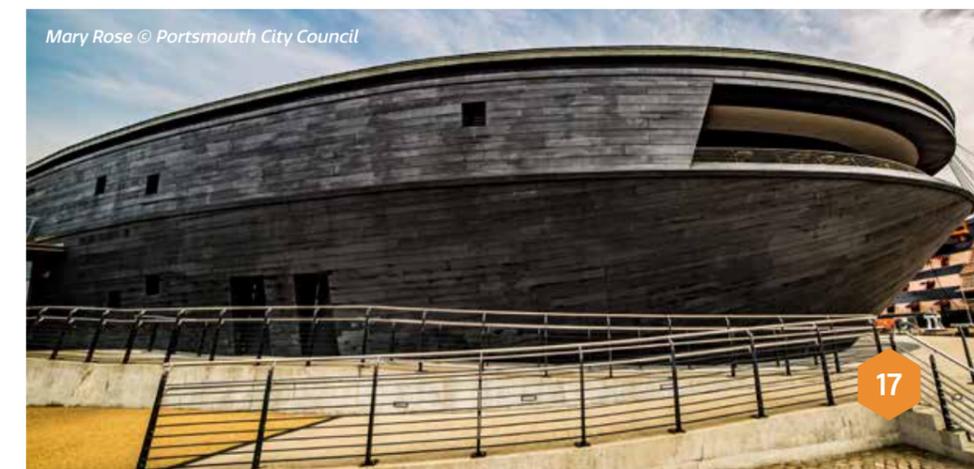
With a world-famous naval heritage, towering world-class visitor attractions, unique shopping destinations, great places to eat and drink and miles of beautiful waterfront, Portsmouth was in the international spotlight even before the D-Day 75 commemorations that attracted worldwide coverage and global acclaim last year.

World leaders and royalty attended D-Day 75; boosting Portsmouth's already burgeoning reputation for hosting high-profile events, including the America's Cup

World Series and Victorious festival, which is fast growing into one of the UK's most successful music events. The city is delighted to be welcoming the America's Cup World Series to Portsmouth again in June 2020.

The city's creative and visitor economy employs 10,000 people and has grown by 10%

per year since 2010. First-class museums and galleries include the D-Day Story – which was shortlisted for the European Museum of the Year award after reopening last year following a £5m redevelopment – and top visitor attraction the Mary Rose Museum – Henry VIII's flagship which contains more than 50% of Tudor artefacts in existence.



Mary Rose © Portsmouth City Council

# FUTURE CITIES: PORTSMOUTH'S VISION FOR TRANSFORMATIONAL CHANGE

Portsmouth's multi-million-pound development schemes will boost the local economy by putting a strong sense of place at the heart of the modernisation and improvement of the city; enabling people to thrive, health and wellbeing to improve and productivity to increase.



Tipner West © Portsmouth City Council

The city's Economic Development and Regeneration Strategy 2019-36 will 'make Portsmouth Britain's premier waterfront technology and innovation city'. The strategy will deliver more than 17,000 new homes and 7,000 new jobs.

Portsmouth's award-winning, multi-disciplinary delivery teams are currently working on the major projects outlined below:

## Tipner West, Portsmouth's once-in-a-generation opportunity

Tipner West is a unique site where land meets sea and roadway meets waterway. Pioneering a new way of living – carless environments with kerbless access – in one of the most ambitious and innovative housing and employment developments the south coast of England has ever seen.

Visionary regeneration of this strategic site will build a new visual and economic gateway to the city creating thousands of new homes and turning water into new jobs. Tipner West will bring £1bn+ investment, More than 4,000 new homes, one million sq ft of marine employment and 2,250 metres of waterfront.

[tipnerwest.portsmouth.gov.uk](http://tipnerwest.portsmouth.gov.uk)



Dunsbury Park © Portsmouth City Council

## Securing the long-term future of the city centre

£1bn+ programme of city centre regeneration initiatives will be nationally recognised as exemplary for innovation, inclusivity and environmental responsibility.

The health and needs of residents, businesses and the communities within the city centre will be the heartbeat for regeneration. Future-proof plans for the city centre include: 2,600 new homes, 9,700 new jobs, 154,000 sq m of employment space and 25,000 sq m of leisure facilities.

## Dunsbury Park, a new Business Gateway to the South

Dunsbury Park is an award-winning business park next to junction 3 of the A3(M) on the London/Solent corridor.

Thousands of new jobs will be created at this unique, natural parkland site. Dunsbury is already home to the global headquarters of outdoor lifestyle clothing brand Fat Face, international logistics giant DPD and Volkswagen specialists Breeze Motor Group. The £140m+ project across 45 acres will deliver: units from 20,000 sq ft to 200,000 sq ft and planning permission for 665,000 sq ft of manufacturing, industrial, distribution and office space. The whole site has

been levelled and is served by a link road, superfast broadband and 9MVA power.

[dunsburypark.co.uk](http://dunsburypark.co.uk)

## The business location of choice

Portsmouth is in the top 10 cities in the UK for the percentage of the population with access to superfast broadband and will be a Gigabit city by 2021. The local full fibre network will attract £50m of private and public sector investment starting with £3.8m of government funding.

Portsmouth offers a range of business centres, premises and locations across the city with space, facilities and working environments to suit all types of businesses.

## Lakeside North Harbour

The south coast's premier business campus set in stunning 130-acre landscaped grounds; Portsmouth City Council acquired Lakeside in 2019 for £138m as part of one of the UK's most ambitious local government funded property investment portfolios.

Lakeside is home to world class brands and vibrant SMEs located in superb, flexible grade A office space. Conveniently located on J12 of the M27 Lakeside is home to 100 companies and 4,000 jobs on one campus with 100,000

sq m of grade A office space, offices available from 3,600 sq m to 36,000 sq m and planning permission for a further 69,000 sq m.

[lakesidenorthharbour.com](http://lakesidenorthharbour.com)

The city also boasts premier industrial, distribution and warehouse locations including:

Voyager Park with 46,500 sq m of modern employment space.

Merlin Park with new units from 850 sq m to 12,950 sq m and with planning permission for around 15,000 sq m of industrial, warehouse, office or research and development uses.

5 Interchange Park providing brand new industrial headquarters accommodation of 3,000 sq m on the market at only £10.50 per sq ft.

Portsmouth also offers excellent innovation and business incubation space across the city in first class centres ranging from the quirky Hot Walls Studios, Port 57 and Aspex Gallery through to the University of Portsmouth's Innovation Space for university spin outs and the iconic Technopole, which is ideally suited to high growth tech businesses.

**Be part of the Portsmouth story and find out more at [investportsmouth.co.uk](http://investportsmouth.co.uk)**



Lakeside North Harbour © Portsmouth City Council

# SOUTHAMPTON: CITY OF OPPORTUNITY

## DID YOU KNOW?

Southampton, located on the South Coast of the UK, has outstanding rail and road links and global maritime connections.

Southampton ranks as the 3rd highest city for good growth in the UK, offering an exciting range of development and investment opportunities.

The Port Of Southampton is the UK's number one cruise port in Europe welcoming over 2 million passengers each year. The Port also contributes £1 billion to the UK economy every year.

Southampton has two universities with a student population of 46,000. The University of Southampton is a founder member of the Russell Group of research-intensive universities and has 6 subjects ranked in the top 50 in the world.

Southampton International Boat Show attracts more than 100,000 visitors. While Cowes Week – is the largest sailing regatta of its kind in the world and takes place in The Solent, attracting up to 1000 boats each year.

The Southampton Centre for Cancer Immunology is the UK's first centre dedicated to cancer immunology research.

Southampton named in top 5 technology 'Super Cluster' cities.

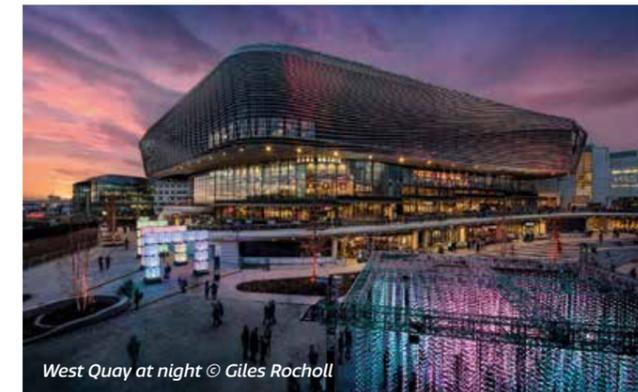
Southampton is bidding to become the UK City of Culture for 2025.



Guildhall Square at night © Nicholas Upton



Carnival UK Head Office © Southampton City Council



West Quay at night © Giles Rocholl



Bargate © Southampton City Council

## The Future

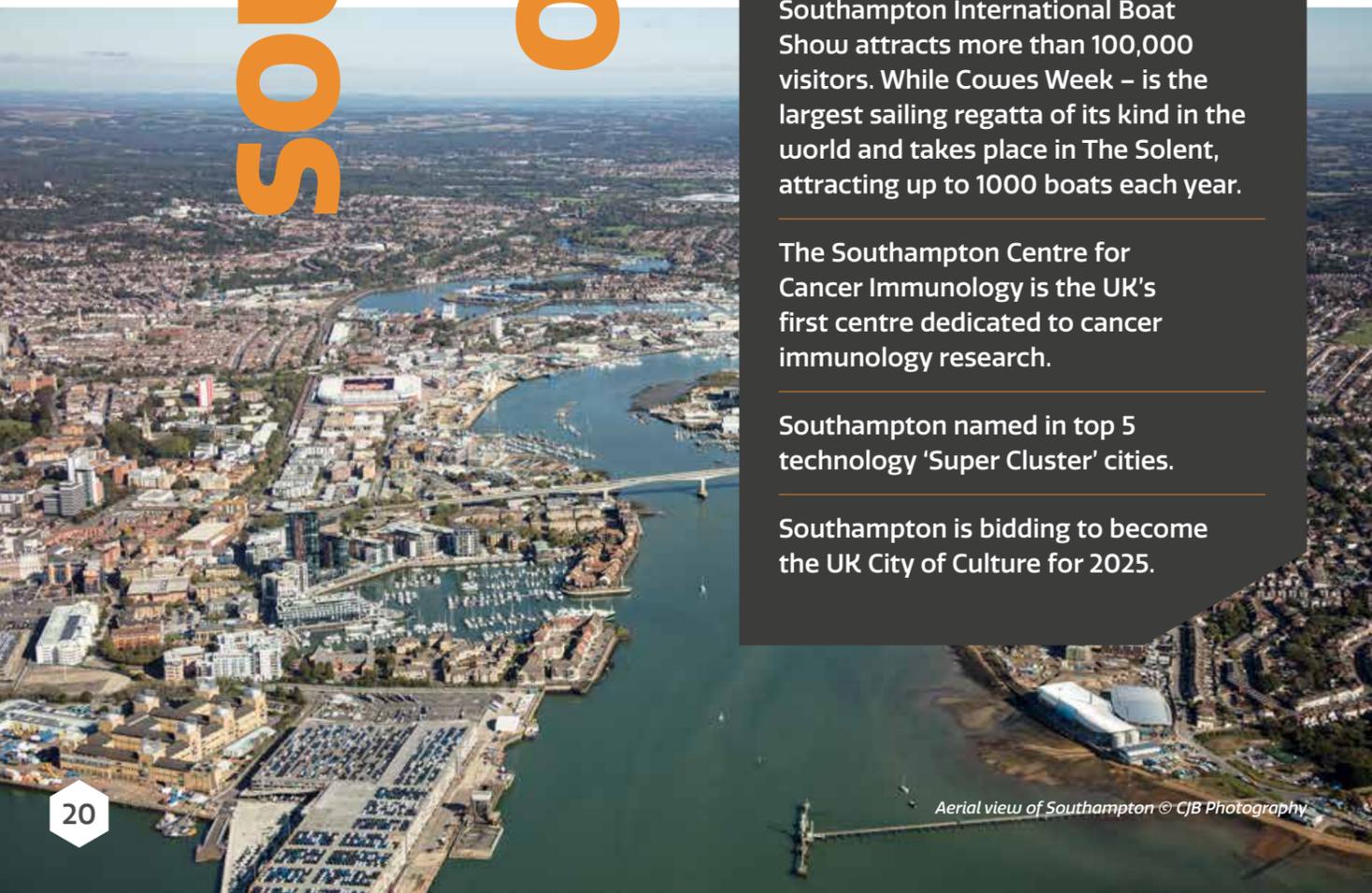
The City has bold ambitions to deliver sustainable growth and better connectivity across the Southampton City Region. The Transforming Cities project will play a vital part in supporting this vision based on three themes that to transform, Mobility, Lifestyles and Gateways.

The planned programme of major investment will transform transport, infrastructure in a focussed way, rethinking the use of road space, ensuring it works for everyone and ensuring the City Region is fit for the future. Key plans include an enhanced bus travel experience, a high quality network of cycle routes and liveable neighbourhoods where active travel is a safe and attractive choice.

Together, these will contribute to the long term aims of reducing congestion, improving air quality, enhancing health and wellbeing and boasting economic growth.

Significant transport infrastructure investment of up to £150m will also support and drive investments in some of the key development projects in Southampton including : Mayflower Quarter, One Station Square and Nelson Gate

[investinsouthampton.co.uk](http://investinsouthampton.co.uk)  
@investinsoton



Aerial view of Southampton © CJB Photography

# FUTURE CITIES: CONNECTING SOUTHAMPTON CITY REGION



Mayflower Quarter © CJB Photography

## MAYFLOWER QUARTER

### Site Details

Opportunity: Developer and occupier opportunities

Masterplanners AR Urbanism appointed January 2020

207 acre (84ha) site

One of the largest urban regeneration areas in the UK, an investment opportunity placing Southampton on the global stage. The 84 hectare area, extending from Southampton train station to the waterfront will be a pivotal step in the city becoming an international destination. The development will provide world class facilities for businesses alongside city centre homes and leisure opportunities. The development will enable the reconnection of an area of prime waterfront with the city centre using mixed use development.



One Station Square © Southampton City Council

## ONE STATION SQUARE

### Site Details

Phase 1 of Mayflower Quarter: £75m, end value could exceed £150m



Nelson Gate © Ellis Williams Architects

## NELSON GATE

### Site Details

Developer: FI Real Estate Management

344 residential units

144 bed hotel with restaurant / bistro / bar, Wellness Centre and conference facilities

4,067 sq m office accommodation

948 sq m commercial space

Over Winchester © Gilbert Yates Photography



# WINCHESTER

Winchester has a dynamic and robust economy which underpins high living standards for its residents and a positive outlook for investors. Ranked top in the Royal Mail UK Happiness Index of 2019 and featuring regularly in best places to live surveys, the city has embarked on an ambitious £360m regeneration programme that promises an optimistic long-term outlook for local businesses.

The bustling city centre, famous for its heritage landmarks, unspoilt open spaces and vibrant cultural events programme has seen day-tripper footfall increase dramatically and their spend almost double over the last five years. And with 57% of Wintonians possessing a degree or equivalent qualification, the area's professional services,

retail, knowledge and creative industries, land-based businesses and public sector organisations are well served – both in terms of customer profile and potential employees. The High Street is flourishing, with vacancy rates low and a diverse offer including independent retailers and eateries, well-known high street brands, celebrity restaurants and a thriving arts and cultural programme. Winchester has gained plaudits for the local high-quality food and drink offer – this industry is supported by a thriving rural economy across a district that spans 250 square miles and is a gateway to the South Downs National Park.

To continue supporting and enhancing the long-term prosperity of the city, Winchester

*"As a place to live, work and visit Winchester is second to none. While factors such as low crime rates, high average earnings and life expectancy, good schools and transport links are factored in to recent national accolades, our thriving economy is the bedrock that underpins a positive outlook for the area."*

*"We have a clear ambition for our city. Once the capital of England, steeped in history and heritage, we are a proud cathedral city with an eye on the future. International business and global brands already call Winchester their home and we are further developing our retail, leisure and business offer to attract new investment, bringing jobs and opportunity to our fabulous city. Couple this with a highly skilled workforce, two universities, high average earnings and fast, efficient transport links to London and beyond by road or rail, it's no surprise we feature regularly in best places to live surveys – a great past and a bold future – join us."*

**Laura Taylor**

Chief Executive of Winchester City Council



Winchester © Harvey Mills Photography 2017

City Council is exploring ways to revitalise a key gateway to the city surrounding Winchester Railway Station. Enhanced by exceptional improvements planned for the public realm, which will create a vibrant setting, Station Approach will transform the welcome to our city, bringing together our shared heritage with state-of-the-art facilities to support innovation, community and prosperity.

Central Winchester is an exciting programme of development that will bring positive change to an area of the city centre by delivering a vibrant new retail, cultural and heritage setting within an exceptional public realm. The newly pedestrian-friendly quarter of Winchester will further enrich the distinctive brand for our city by creating a place of cultural and social experience, incorporating a network of streets and spaces for the enjoyment of residents, workers and visitors.

# PROGRESSING CONNECTIVITY

Neil Garwood, Managing Director at Southampton Airport, talks about the evolution of connectivity and the role the Airport is playing in the Central South's future.

Connectivity has always been important. The ability to maintain contact with others is a core element of what it means to be human. It is vital that we continue to build this.

Opportunity thrives when connectivity is in place – developing new frontiers; building trade routes; exchanging thoughts and ideas; seeing what exists beyond our immediate horizon.

As our evolution has taken us from the agricultural to the industrial to the digital age, so our connectivity has moved from byway to motorway, from horse and cart to high speed rail, from airship to spaceship.



*"The Central South's location as a frontier with mainland Europe: outward-looking yet anchored with excellent links to the whole of the UK."*

**Neil Garwood**  
Managing Director at Southampton Airport

Regions thrive and grow when they have strong connectivity, when goods and services can travel quickly and effectively from place to place.

The Central South is truly well connected. Criss-crossed by railway lines, bisected by motorways and home to international airports and sea ports, the region is blessed with an abundance of connections that make it a supremely attractive place in which to live and do business.

The Central South's location as a frontier with mainland Europe: outward-looking yet anchored with excellent links to the whole of the UK. As the UK seeks its future outside the European Union, the country's ability to remain connected is more important than ever.

On an April day in 1910, just seven years after the inaugural flight by the Wright Brothers, a young man named Edwin Moon pulled on his leather

cap and made history. In his homemade aircraft, Moonbeam II, he undertook the first ever flight at a place that would go on to become the longest continuously-operational airfield in the world – a place that was the very origin of the word 'airport', arising as an aeronautical version of the thriving seaport a few miles away.

These were the historic beginnings of what became Southampton Airport, today a thriving regional airport and a hub for the region's air links across the UK and Europe. And in the 110 years since that first

flight the airport has gone from strength to strength. Its value as an employment zone and a contributor to the region's economic growth is secured; and plans to expand and provide greater choice in the years ahead are being rapidly progressed.

Our development plans will deliver improved connectivity and this is crucial as the UK looks to the future. We want to make our region stronger, better, bolder – and great connectivity is at the heart of that.

**southamptonairport.com**



# INVESTING IN TOMORROW'S CITY CENTRES

Olly Sowton, Partner at Blake Morgan explores the future of the Central South's city centres.



Right now our city and town centres are regularly in the news, and the story is always one of decline. Analysts report that footfall in our High Streets has reduced every year for the past ten, and as a result shops are closing and jobs are being lost. The culprit, we are told, is either the internet, or perhaps the out-of-town shopping centre.

But our city centres aren't just places to go shopping. Cities have many roles, from centres for government to places where people meet and socialise. Nearly half of city centre premises are houses or flats, and one in ten are offices. And people don't just go there to shop: they may visit the cinema, a bar or a club, or to see their doctor or solicitor.

The central south arm of established law firm Blake Morgan is working with the Southern Policy Centre to explore how four cities in this region of England – Bournemouth, Portsmouth, Southampton and Winchester – are evolving to meet the demands of the future. We're talking to local residents about what they like about their cities, what they dislike, and what they think should change. We're asking people what they want from tomorrow's city centre: as a place to shop, work, live and play.

These are important questions. The population of our four cities will grow by 9% in the next twenty years, faster than the surrounding towns and villages. History tells us the growth in the city centres will be higher: the population of Southampton city centre almost doubled between 2002 and 2015.

Our research is asking how our city centres can remain at the heart of the urban community: how will they respond to challenges as diverse as the internet or global heating, what sort of retail, housing or workspace they should provide and what will make them exciting places to visit in the region.

We'll be looking at the many good ideas being tried out across England, from the mix of business and leisure uses planned for a former department store in Southsea, to One Station Square, part of the dynamic vision for Southampton's Mayflower Quarter.

How we invest in this region of England is crucial to ensure that our cities remain vibrant go-to hubs in the UK's Southern Gateway.

The report will be published in the early summer of 2020. To find out more contact: **Rebecca Whitehead**  
[Rebecca.Whitehead@blakemorgan.co.uk](mailto:Rebecca.Whitehead@blakemorgan.co.uk)

*"To survive and succeed city centres in the Central South will need to rely on their ability to adapt, retain their sense of community, tackle inequality, use space intelligently, provide a healthy environment and offer a distinct identity."*

**Olly Sowton**

Partner at Blake Morgan



*"Portsmouth, with its waterfront attractions, offers a series of outstanding soloists to accent the overall ensemble."*

**Richard Summers**

Director and urban designer at Architecture and Masterplanning specialists Boyle+Summers Ltd

# THE URBAN EXPERIENCE OF THE CENTRAL SOUTH'S WATERFRONT CITIES

Richard Summers, Director and urban designer at Architecture and Masterplanning specialists Boyle+Summers Ltd compares the urban experience and intrinsic characteristics that define each of the Central South's waterfront towns and cities.

Each of the principal cities of the Central South region – Southampton, Portsmouth and Bournemouth – offer distinctly different urban experiences. Whilst they are all, naturally, in competition, to a degree, their particular components, assets, relationships, settings, stories, economies and communities mean each is attractive to a vastly and subtly alternative clientele.

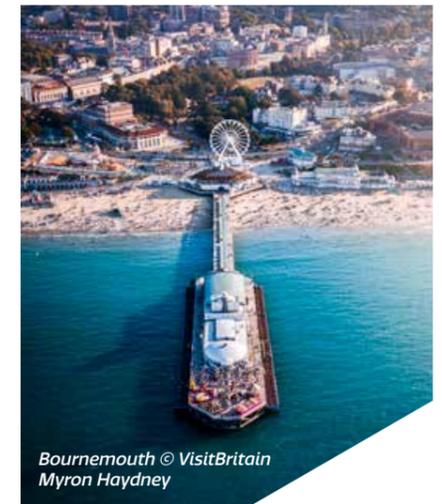
Southampton could be the rhythm section of a blues band – solidly reliable, deeply rooted, and the foundation at the heart of the region. Bournemouth, in contrast, has the swing and sweep of a pop-soul orchestra – a place in the business of Show. Portsmouth, meanwhile, with its waterfront attractions, offers a series of outstanding soloists to accent the overall ensemble.

Part of their DNA derives from the unique pattern

of their streets, parks and neighbourhoods. And to the manner in which each city relates to the ocean. All three grew because they offered access to the sea, albeit for different reasons and in distinctive ways.

Southampton and Portsmouth are commercial and military ports respectively, each built around the demands of ocean-going ships for servicing, crew, freight, supplies and rest-and-recuperation. The historic cores of both cities remain, whilst both were successively amended to make access to the ports easier, and the cities themselves were expanded in to the water to allow expansion of their ports.

Bournemouth's origins as a spa town are much more recent and its genteel modernity quite at odds with its robust older cousins to the east. A planned town of pavilions and villas its



seafront beaches are the draw, and its central Gardens the route to them. Whilst the ports are launchpads for voyages long or short, this seaside town's existence is based around the desire to paddle.

The evolution of each city continues, with an increase in pace reflecting their buoyant local economies and the growing appetite for urban living, working and leisure. More than ever in living memory, each is the focus for their communities, their centres embracing sustainable urbanity, with high quality architecture and public realm alongside historic quarters in the best European tradition.

[boyleandsummers.com](http://boyleandsummers.com)

# A NEW WAVE OF COASTAL REGENERATION

Gavin Hall, Director of Planning at Savills, based in Southampton looks back at the history, considers future growth opportunities, and highlights the events that enliven the Central South waterfront.

The UK's coastal communities have distinctive characteristics, providing opportunities to live and work not found in other inland locations. In June 2019, the Future of Seaside Towns report was published by the Authority of the House of Lords and is being widely invested in by the UK Government. The Government invested almost £227 million in the Great British Coast by 2020 through dedicated programmes, such as the Coastal Communities Fund, to boost local economies and celebrate the unique heritage of the UK coast.

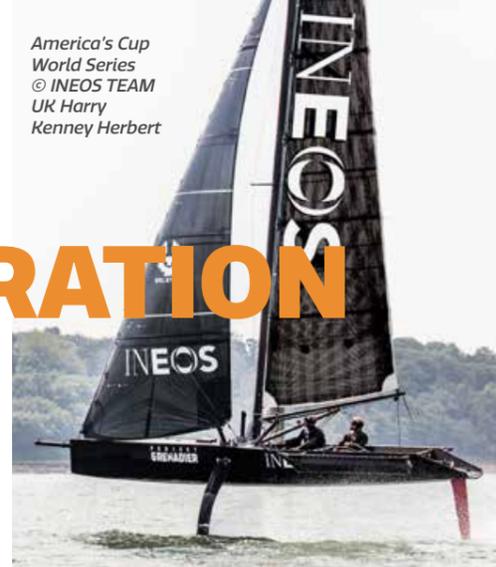
## History

Seaside towns emerged as leisure resorts, gaining popularity in the nineteenth century. Since this time, many towns have forged identities revolving around shipbuilding, tourism, leisure, fishing, or port activities. The Central South is home to some of the UK's most distinctive and largest coastal towns and landmarks such as the Spinnaker Tower in Portsmouth and the UK's cruise capital in Southampton.

## Maritime Industry

The maritime industry is also fundamental to the Central South region and is expanding, with existing yacht and boatbuilding industries bouncing back with increased revenue and skills being promoted in historic shipbuilding towns such as Portsmouth. Boathouse 4 in the Portsmouth Historic Dockyard is home to The International Boatbuilding Training College, training a new generation of students in the techniques of traditional boatbuilding.

The Central South maritime industry spans both the old and new. Superyacht UK's annual report in 2019 reports a £308m added value in GVA to the UK economy in 2018/19; a 7% increase on the previous year. Portsmouth City Council, in conjunction with Savills, is also bringing forward proposals for a new marine and maritime hub at the gateway to the city, helping to meet the city's employment and housing needs at Tipner West, with the provision of circa 4,000 homes and 2,000 new jobs for the region.



America's Cup World Series  
© INEOS TEAM  
UK Harry Kenney Herbert

## Events

The Central South region is also home to many globally recognised events. The Emirates 36th America's Cup World Series will take place in Portsmouth from the 4th to the 7th of June 2020, selected as one of two locations outside of New Zealand to watch the competition. The city previously hosted the races in 2015 and 2016, with more than 250,000 spectators along the seafront. Southampton International Boat Show is held in the city each September with Cowes Week also held on the Isle of Wight each August.

## A Future Ready Region

The region's coast stretches 230 miles with The Solent area one of the busiest coastal zones in England. Interest and investment in the coastal region in the Central South and across the UK are growing at both the large and small scale, acknowledging the importance of attracting business and skills to coastal areas and the potential returns this can offer.

[savills.co.uk](http://savills.co.uk)

# COASTAL RENAISSANCE

Matt Golds, Managing Director at Noviun Architects explores how architecture and design are playing a role in the regeneration of the coastal regions of the Central South.



Retained arch view at Mayfield school © Noviun

In recent years there has been an increase in the densely built up coastal cities to re-use and bring back to life the existing "tired" structures. With the aim to regenerate surrounding areas, making these more attractive for prospective residents and/or students. In Portsmouth and Bournemouth, Noviun has worked on several projects, totalling over £75m, that re-purpose part or all existing structures. Linking with climate emergency, re-use has seen a real renaissance, creating many great pockets of opportunities for developers, professionals and Councils alike.

One of these projects is Livingstone Academy – a complex urban all-through school, specialising in Digital Technology and Computational Thinking. Located in the centre of Bournemouth, it that includes new state-of-art facilities and a refurbishment of a Grade II listed former Coroners and Magistrates Court. The project challenges the traditional thinking of schools and explores the idea of vertical design, furthermore, with innovative designs for external play areas

on roofs, maximising the space available in tight urban sites. The building is one that the staff and 1,510 pupils can be proud of and a new, high quality and vibrant location within the city within increasingly regenerating area.

A slightly different approach was used for Mayfield School, whilst demolishing and re-building the majority of the existing buildings, the project does retain some key elements of these as small reminders of the history of the site for Community and the School. The proposals received great support at the public consultation events as the new design will bring the teaching standards and facilities into the 21st century, specialising in increasing popular Science, Technology, Engineering and Mathematics (STEM) curriculum. High quality facilities are an important tool in attracting interest from more pupils and encouraging them to maximise their own talents, which can move onto studying these subjects at University and potentially being our next generation of scientists.

The Architects' Journal are currently promoting their

–RetrofitFirst campaign, which focuses on the regeneration of existing structures as a first option when considering project potential. The University of Portsmouth have recognised this with their latest estates' management plan, working with Noviun to refurbish two of their major buildings, King Henry and St Michael's. These buildings house the Faculty of Science and Health. Refurbishing/remodelling ensures that the buildings can withstand the test of time, whilst still providing excellent learning facilities for students to prosper in.

History and innovation are strong concepts that Noviun intertwine within the designs of developments within the coastal regions. We are glad to be involved in these projects, providing our specialist knowledge within the sector and the Central South region and have no doubt that these interventions will be great assets to the cities, celebrating the buildings that have stood the test of time and been part of the cities for years.

[noviun.com](http://noviun.com)

# A NATURAL CAPITAL APPROACH TO THE FUTURE

Rob Asquith, Head of National Infrastructure Planning at Savills, considers a Natural Capital approach to the future of the Central South region.

Natural Capital, the stock of freely available resources such as clean water, is increasingly considered as important as human-built infrastructure.

We know when it fails because our towns flood or our coastal waters fill with algae. In the same way as we all know when the railway is blocked or the power lines are down.

The Natural Capital approach is that natural resources should be considered as infrastructure like, say a railway, and hence invested in and maintained similarly. A first step is auditing and valuation of the current stock. An oft quoted example is UK Forestry. Considered simply in terms of the commercial value of the timber it's value is a fraction of that if all of the ways we benefit from forests – carbon stores, floodwater regulation, recreation, biodiversity – are accounted for.

Circa £3bn of public money is spent annually on rural land management. The concept "Public Money for Public Goods" has gained currency as UK farming moves from subsidies rewarding production or land ownership towards considering the importance of our rural areas more widely. Natural Capital approaches are also appearing in planning with a transition towards Net Environmental Benefit as a basis of decisions.

The Central South has some of the most famous landscapes, intricate coastal environments, a huge marine leisure and tourism sector, and a lot of land depleted by intensive agriculture – plus considerable development pressure. At present one of the key issues is the effect of land use and development on the coastal habitats of the South, particularly The Solent Harbours where nutrient loads are contributing to eutrophication. The linking of cause and effect is a very live issue affecting residential developments in the areas that drain to the harbours.

Pragmatism and proportionality are key features of the response. The answer long term lies more with agricultural management than control of

development but it is because the relatively small effects of development are felt immediately – as opposed to with lengthy lag for farming activities – that offsetting of nitrogen effects is a live issue for development. The answer lies in understanding the correctly of how landscape or catchment level cycles of water, nutrients, carbon, biomass etc work. World leading approaches are being developed to this in the Central South to identify what the Natural Capital infrastructure is and how it should be invested in. Administrative areas and ownerships are incidental to natural cycles, hence co-operation within and between public and private entities is key.

One is often asked if one feels optimistic about the future, given the evidence of threats from climate change. We cannot do anything about the past but a Natural Capital approach to the future will create greater prosperity because we all know that investing in the right things creates returns. Unlike many of the environmental theories proposed before, Natural Capital is rooted in the free-wheeling entrepreneurial approach society the British hold dear.

The Central South has some of the greatest challenges but also is already leading the way with solutions which will deliver a more prosperous and certain future.

[savills.co.uk](http://savills.co.uk)

*"The Central South has some of the most famous landscapes, intricate coastal environments, a huge marine leisure and tourism sector."*

**Rob Asquith**

Head of National Infrastructure Planning at Savills



© Gosport Peninsula



The view over The Solent and the waterways between Southampton and the Isle of Wight © Visit Britain Images Andrew Pickett

# THE BEST ENVIRONMENT FOR INVESTMENT

Two world class National Parks, the world's leading sailing hub, extensive countryside and over 200 miles of stunning coastline. No location in Europe, potentially the world, has such natural assets. The relationship between the global cities and this natural capital makes the Central South a unique and globally attractive location to invest and prosper. Robin Shepherd, Partner at Barton Willmore explains.

It's not hard to see why millions of people choose the Central South as their place of residence; easy access to green open space and the associated health benefits of living by the coast and countryside, paired with a location just 90 minutes outside of the UK's capital are just some of the obvious benefits. The New Forest and South Downs alone count for over 2000 square kilometres of wild landscape. It is well known that places which can offer an attractive living and working environment are also those places which are most attractive to invest in. That's why over 20 FTSE 100 companies and 100k SMEs now choose the region as their preferred location.



New Forest National Park © Nick Lucas [thenewforest.co.uk]

The decision of where to locate a business is now far more complex than just the ability to access to a workforce or to take advantage of infrastructure. Business leaders and their targets – a skilled, world-class workforce – want an attractive environment to live, work and feel part of. The health, wellbeing and lifestyle advantages of a connection with nature and the natural environment is well known – one study suggests that outdoor exercise delivers an estimated £2.2bn of health benefits to adults in England each year – and it is those connections which the Central South has in abundance.

The ease of access to some of the world's finest natural environments provides for sport and recreation which no other location can – be that sailing and water sports, cycling, walking

or simply spending time enjoying a view. The choice is endless. As an environment for young people or families, the Central South offers the highest quality lifestyle for all.

Supporting these natural environments is a diverse and thriving ecosystem supported by the Central South's water and attractive climate. The juxtaposition of people and the natural environment combined with the Central South's commitment to environmental responsibility ensures these ecosystems continue to thrive – and, of course, local produce is a way of life – the Central South way.

[bartonwillmore.co.uk](http://bartonwillmore.co.uk)



Winchester Old Hill looking over the Meon valley and the South Downs © Visit Britain Andrew Pickett

# PLANNING FOR A SUSTAINABLE FUTURE

Tim Hancock Managing Director, and Suzanne Bangert Technical Director, of award-winning planning and design company Terence O'Rourke Ltd, explore how the Central South is planning for a more sustainable future.

The impact of climate change has come very much to the fore recently. In June 2019 the UK became the first major economy in the world to legislate to bring all greenhouse gas emissions to net zero by 2050. Many local authorities in the Central South region have recognised the importance of climate change by declaring a climate emergency. Action plans are being put in place to address the issue. Being a coastal region provides significant opportunities but also poses particular challenges in respect of climate change, which local authorities, organisations and businesses in the area are starting to embrace.



Fawley Waterside

Constructing developments that are designed from the outset to address their contribution to climate change by reducing greenhouse gas emissions during design, construction and occupation and be resilient to flooding is important. Many authorities require or encourage the incorporation of renewable energy to ensure ongoing production of green energy. Taken with the need for high quality design leads to the development of successful, attractive places.

The award-winning Farnborough International Exhibition and Conference Centre at Farnborough Airport achieved a BREEAM Very Good rating using a bespoke assessment. The development includes a fabric-led approach to energy efficiency, minimisation of electricity and water use through a range of measures and the introduction of travel plans and transport strategies for the range of event sizes and types that take place.

In relocating its headquarters to a new site in Southampton, Ordnance Survey took the opportunity to use environmentally sustainable technology to maximise natural resources, minimise carbon emissions and be energy efficient. The site utilises a ground source heat pump, includes building integrated energy management measures, a rainwater harvesting system and sustainable transport



Farnborough International Exhibition & Conference Centre

initiatives to encourage public transport use, car sharing and walking/cycling to work. The building achieved a BREEAM rating of 'Excellent'.

The requirement to deliver substantial additional housing in the region continues with emerging schemes such as that at Fawley Waterside and Welborne Garden Village including a wide range of measures aimed at ensuring development is not only attractive and well-designed but also sustainable in the long term. Future-proofing development is important, with many authorities now requiring the inclusion of electric car charging points or the ability to include these in future.

The Central South region has been the focus for significant numbers of renewable energy

projects. It is also the home to the Vestas blade factory on the Isle of Wight. Substantial numbers of solar PV schemes have also been developed, including one of the first subsidy free schemes at Westhampnett, West Sussex. It is anticipated that the number of proposals for solar schemes will increase following improvements in the viability of these schemes. With careful site selection, well-designed solar farms can be integrated within their local environment and lead to biodiversity gains.

Climate change affects us all; the Central South region is taking its responsibility seriously. New development will continue to be needed but there is a growing expectation that it is environmentally sustainable.

[torltd.co.uk](http://torltd.co.uk)

# DESIGNING A CARBON FREE FUTURE



Epping St John's School, Epping

Alastair Mallett, Technical Director at Novium Architects analyses the role the design and construction industry has to play in the climate emergency.

In the last year, climate change has become mainstream. Greta Thunberg and Extinction Rebellion have brought the impending crises into sharp focus. Although many will disagree with their approach, surely none can disagree with the underlying message, that without urgent action we are in danger of allowing the climate to spiral out of control.

2019 was a watershed year. The climate emergency is now acknowledged and there is widespread support for an acceleration of the transition to Net Zero Carbon.

By 2030 all new buildings must operate at net zero to meet our climate change targets. This means that by 2025 all new buildings will need to be designed to meet these targets. We therefore have five years to do it progressively so that it becomes the norm in 2025. We should start now.

In June 2019 The Government passed a law requiring the UK to end its contribution to global warming by 2050 by bringing all greenhouse gas emissions to net zero. It also heeded the advice contained in the report by Committee on Climate Change "UK: Fit for the Future" to ban fossil fuel heating by 2025, broadly seen as a ban on gas boilers.

Following this announcement, the Government released its proposed Future Homes Standard consultation. Although welcome, this document is flawed in several aspects, including:

- I. Fabric performance is likely to get worse with the new standards, as an energy efficient heating system can hide poor fabric performance.
- II. Local Authorities will lose the ability to set their own zero carbon standards that go beyond the new Part L.

We as a practice, have pledged to work to raise awareness of the climate crises and to ensure that all our schemes are designed to minimise their energy consumption and carbon footprint., to this end we have:

- I. Signed up to the RIBA 2030 Challenge,
- II. Joined Architects Declare. To Raise awareness of the climate and biodiversity emergencies and the urgent need for action amongst our clients and supply chains.
- III. We are participating in London Energy Transformation Initiative (LETI):

Who have developed a technical guidance roadmap which will set out the approach, targets and benchmarks that developments in the UK need to achieve to reach Net Zero Operational Carbon.

We actively collaborate with clients, stakeholders and the wider design team to promote low carbon and low energy buildings and encourage clients, other design team members, contractors and building occupiers to adopt responsible and complementary environmental standards. Current environmental regulations, and codes of practice must be regarded as minimum standards of performance.

Climate emergency is the Oxford Dictionaries' 2019 Word of the Year following a year of climate strikes (including the largest in history), mass civil disobedience, Architects Declare, reports from the Intergovernmental Panel on Climate Change (IPCC), and calls from Sir David Attenborough for action. Ultimately, the race is now on to reach carbon zero by 2050, if not before.

Every industry has its role to play and construction has its own challenges. We need to design buildings that are low-carbon, energy and water efficient, climate resilient, healthy and desirable.

A rigorous determination to tackle carbon from buildings will make the 2020s a decade of building renewal that takes long overdue action on carbon emissions from building.

[novium.com](http://novium.com)



© architectsdeclare.com

<sup>1</sup>LETI Net Zero <sup>1</sup>LETI Net Zero <sup>1</sup>Climate Change Act 2008 (2050 Target Amendment) Order 2019

# LOOKING FOR FURTHER INFORMATION?

If you are interested in any of the development opportunities promoted within this publication and would like to find out more, please get in touch by using the contact details below:

## Development opportunities in Portsmouth:

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## Development opportunities in Winchester:

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## Development opportunities in Hampshire:

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## Solent LEP:

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## Development opportunities in Southampton:

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*"With a fleet of nine ships, the majority of which home port in Southampton, plus Iona joining this year and a further two ships on order to arrive by 2022, we continue to invest in the Central South region, the port of Southampton and its infrastructure to secure our long term future.*

*Each time a ship comes into Southampton it brings £2 million to the local area and we have around 180 turnarounds this year. Local provenance is a high priority and we use many local suppliers across the Central South region to provide quality food products and services across our ships. Our association with the region is essential and we're proud to call Southampton our home. We've extended our lease on Carnival House, our head office on Harbour Parade until 2038, demonstrating our commitment to the region."*

**Josh Weinstein**

President, Carnival UK



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