



9. Recommendations and Implementation

9. RECOMMENDATIONS AND IMPLEMENTATION

- 9.1 The Strategy should be based on clear recognition and general acceptance of the fundamental importance of marine industries to the sub-regional and regional economies. This should be linked to a commitment to take action to support and provide for their expansion, where that is a reasonable prospect. The overarching long-term objective should be to grow the marine economy as one of the building blocks of sustainable prosperity.
- 9.2 Leadership in this area is presently fragmented and we do not underestimate the challenge presented by the need to change traditional approaches in order positively to promote marine industries. In particular, we consider there to be a need to take action to identify and protect locations for future growth and ensure that the spread of other land uses does not inhibit existing and future marine industrial activity.
- 9.3 It is essential to take a longer-term view than is normal in spatial planning. In respect of marine infrastructure and potential sites, far longer - we suggest at least thirty years. Before key sites are given over to other uses, or designated for conservation purposes, very serious consideration should be given to the need to retain them for marine industries. The loss or constraint of marine industry sites could make it difficult if not impossible to achieve the overarching objective.
- 9.4 We suggest key targets should be to:
- i. gain regional and national recognition of the economic importance of marine industry in the Solent, and the need to provide support for its growth;
 - ii. establish the overarching objective as one of the foundations of spatial policy;
 - iii. promote innovation and expansion of existing marine industries and growth of the core marine clusters, which requires the attraction of new marine industries, and related activities that will strengthen and expand existing clusters;
 - iv. safeguard marine sites suitable for marine industries in planning policies, including consideration of non coastal land as suitable for marine industry purposes;
 - v. with partners, analyse and address the economic-environmental balance at sub-regional level, particularly in relation to nature conservation, climate change and sea-level rise;
 - vi. address the issues of the lack of affordable land and premises, including direct intervention;
 - vii. identify and address skills and training requirements, and age-imbalance, as a matter of priority, and
 - viii. simplify and strengthen strategic planning arrangements for the Solent.
- 9.5 We consider each of these components separately, setting out key recommendations for each.

Achieve National and Regional Support for Solent Marine Industries

Recommendation 1

- 9.6 ***SEEDA, the PUSH and other relevant authorities, and business partners should seek to influence Government to ensure that the national and regional significance of marine industries to the Solent area is recognised, for example in RSS and emerging government policy, and provides support for the firm foundation of marine industries in future Policy.***

Implementation

- 9.7 Although the recommendation is to SEEDA, all relevant local authorities and business partners, it is considered that SEEDA and the PUSH authorities have a clear leadership role. However it is also recognised that they also require a mandate for action. The relevant authorities and partners will need individually to commit to supporting and sustaining the growth of marine industries as part of the future economic strategy for the sub-region.

Promote Innovation and Growth and Support for the Core Marine Clusters

Recommendation 2

- 9.8 ***The Solent is the centre of UK marine industries and SEEDA, the PUSH and other relevant authorities and marine industries should raise the profile of the importance of the Solent as such and actively promote it as a place of growth and innovation.***

Implementation

- 9.9 There is considerable scope to promote the success of Solent marine industries more widely and coherently. We see benefit in SEEDA, working with the PUSH, other relevant authorities and the marine industry in particular, actively promoting the Solent as the centre of UK marine industry, with an emphasis on its strengths in the fields of innovation, technology and education, recognising that it is home to internationally renown specialist industries at the leading edge of product development. Facilitating and encouraging new marine businesses in future potential growth sectors (such as the repair and re-fit market, particularly super yachts) would make sense. The geographical strength of the Solent, its marine infrastructure and assets should also be promoted. This should include the Solent's role as a centre of excellence for research and education in marine and other engineering disciplines. Key flagship research facilities include the National Oceanography Centre and the Marine Regional Resource Centre.
- 9.10 We suggest that SEEDA develops a clear, co-ordinated marketing strategy to raise the profile and significance of the industry, with a clear distinction between the requirements of the commercial ports sector and the marine leisure sector which operate in quite different markets. We suggest that there

may be scope to look beyond the UK, to target marketing and advertising across Europe and globally. Success can be celebrated using a variety of media including the local and national press, publicity material (including web-sites) and articles in industry publications. A series of workshops with local politicians and a wider conference to target partner organisations and marine businesses may also be a good way to both launch the Strategy and raise the profile of the industry. The aim should be to build local, regional and national confidence in the Solent marine industry as a key and growing component of the UK economy.

- 9.11 It will be necessary to raise awareness of the significance of marine industries as a key economic sector and driver of economic growth and that the Solent marine sector comprises a range of high value/high productivity activities which meet SEEDA's and the Regional Assembly's drive for 'Smart' growth. It will be important to achieve local and regional political support for the need to invest in key training initiatives and identify sufficient sites, both of which will be required to deliver 'smart' economic growth. There is scope to communicate key messages through the LDF process particularly during the issue and options discussions in the formulation of core strategies and other LDDs, again drawing out the distinction between the different sectors.
- 9.12 Success in raising the profile of the Solent as the centre for marine sector excellence will, at least in part, be dependent on the scope for the PUSH and other relevant authorities to pursue a single common strategy accompanied by consistent, cross boundary planning and economic development policies.
- 9.13 The marine industry itself can also take action to improve its public image and to review its own communication networks with a view to strengthening its voice and ability to communicate effectively with public agencies and LPAs. Marine industry must also look beyond the UK market and benchmark with Europe and beyond to stay competitive in the global market.

Safeguarding Marine Sites

Recommendation 3

- 9.14 ***Strategic marine sites of existing national and regional economic importance or with the potential to be of national or regional economic importance should be identified and safeguarded for marine employment use only in relevant Local Development Documents.***
- 9.15 ***Relevant Local Development Documents should identify strategic marine sites of existing or potential local significance and either safeguard them for such use or provide clear policy support for them to be used for such uses. It is suggested that strict policy criteria are set that would need to be met before these locally significant sites could be used for non-marine employment purposes.***
- 9.16 ***Relevant Local Development Documents should also recognise that key marine employment sites may not be limited to those with access to water. During the production of relevant Local Development Documents, authorities should take note of the requirements of marine***

industries in respect of these 'off coast' sites. The SEEDA and marine industries should work with local authorities to identify such requirements. Such needs should be taken into account by local authorities in the identification of land for employment purposes.

Recommendation 4

- 9.17 ***The Port of Southampton is likely to require significant additional land to maintain its long-term competitive advantage in the future (this includes both operational and back-land for servicing and distribution). SEEDA and the PUSH authorities should work together with the Port to identify and safeguard land for future port-related use in Local Development Documents to secure the Port's future as a premier, global port and economic driver within the sub-region.***

Implementation

- 9.18 In our view, a significant threat to the continued competitiveness and growth of marine industry is the shortage of available suitable land to accommodate growth and innovation. Strategic marine sites of existing national and/or regional importance or with such potential should be identified and safeguarded for marine employment uses in relevant individual LDDs.
- 9.19 It is recognised that it is not appropriate for decisions of such magnitude to be left to individual local authorities, although ultimately land allocations will need to be pursued through the development of individual LDDs and will need to withstand vigorous testing. We therefore suggest that SEEDA take the lead, with the assistance of the PUSH and other relevant authorities as necessary, on a coherent and consistent site identification and assessment process to provide a robust local evidence base to feed into the production of relevant Local Development Documents to allow for the safeguarding and protection of sites as recommended above.

Existing marine sites of national or regional significance

- 9.20 Unless there are overriding reasons in individual cases for not so doing, existing marine industry sites of existing national or regional significance should be specifically safeguarded for marine use in relevant Local Development Documents. At least the following existing marine sites are nationally important:
- Operational land occupied by the Port of Southampton ;
 - Sites in established marine leisure use along and around the Lymington, Hamble and Medina Rivers, and capable of remaining in such use;
 - Land associated with the HM Naval Base and Dockyard at Portsmouth;
 - Marchwood Seamounting Centre;
 - Land occupied by the Fawley Oil Refinery and Hamble Oil Terminal.

We anticipate that if the detailed assessment process suggested above in paragraph 9.19 was carried out this list may be extended to include other sites.

Commercial Ports

- 9.21 The Government advocates the preparation of port masterplans. These would be particularly useful for the Port of Southampton and the Commercial Port at Portsmouth and should also be considered for smaller ports. The PUSH and other relevant authorities should aim to work in partnership with the Ports in developing their respective Port masterplans which should then be given due regard in the preparation of Local Development Documents and in the allocation and safeguarding of land for marine uses.
- 9.22 The overall economic significance of the Port of Southampton means that it will be essential to seek to introduce strategic policy support for its sustainable expansion. Consultation on suitable locations could be carried out as part of the process of preparing its masterplan. The identification of sites 'off dock' suitable for port-related uses not requiring direct access to the water (such as distribution centres, empty container storage, port services and repairs) is also likely to be required. Policy EC6 of the Hampshire County Structure Plan which safeguards land for port-related uses at Dibden has been further 'saved' beyond the initial three year period by the Secretary of State.
- 9.23 There is scope for further growth of Portsmouth's commercial port activities and opportunities to forge greater links and association with the neighbouring activities at the Naval Base. Clarification of the needs of the Base may permit this occur. There should be a strong presumption against the loss of waterfront land from MoD use to non-marine activities. SEEDA and the relevant local authority may have a facilitating role to play in this regard and further land allocation may be appropriate.

Marine Leisure

- 9.24 The PUSH and other relevant authorities should consider under taking further micro-studies of the Lymington, Hamble and Medina Rivers, and Portsmouth Harbour to identify specific future land requirements of the marine leisure industry; to ensure that safeguarding and land allocation is appropriately targeted; and that planning policies facilitate innovation and growth.

Marine sites of potential national or regional significance

- 9.25 It is important to begin the task of identifying an appropriate landbank of strategic allocations of land suitable for marine industries. Very few locations have the necessary credentials of access to sufficiently deep water and good land communications. Three general locations with the potential to be of greatest significance out of those identified and where sufficient land might be made available stand out:
- a. Land within the site of HMS Daedalus, in SEEDA's ownership, provided that appropriate water access can be achieved: land access also requires improvement;

- b. Land on the western bank of Southampton Water between Hythe Village Marina and Marchwood Seamounting Centre, including land subject to the criteria identified in saved structure plan policy EC6 This location is nationally significant for its potential to accommodate marine industries as one of a very limited number of sites with access to world shipping routes, and;
- c. Land with water access to the Medina.

9.26 None of these locations is straightforward, and significant environmental and infrastructure constraints would have to be overcome if they were to come forward. However, if they do not come forward, the message of the Study is that the contribution of marine industries to the future economy will be significantly restrained. Constraints to their use by marine industries include international and national nature conservation designations and inadequate access. These issues need to be addressed at regional and national level as well as locally, including the identification of appropriate mitigation and compensation strategies to ensure the maintenance of the integrity of the designated sites. This task is likely to have a lengthy lead time.

9.27 Evidence from SEEDA is that there is a current unmet demand for waterfront sites in their ownership from marine industries. SEEDA will need to maintain a rolling programme and carry out a periodic review of new marine opportunities and sites to ensure that ongoing demand for sites suitable for marine businesses can continue to be met in the future. The Strategic Development Areas proposed for South Hampshire, whilst not on the coast, may be suitable locations for marine industry not requiring access to the water and may also provide much needed land for marine supply chain industries, in particular supporting the Port of Southampton. Where employment land allocated for marine-related uses and linked to other fiscal incentives to ensure that land was affordable to small and medium sized business, there could be an opportunity to facilitate growth and innovation within certain sectors of the marine industry.

9.28 In the longer-term, whilst the outcome of the recent defence review has safeguarded the future of the Naval Base at Portsmouth and the future of other defence sites have recently been secured, should circumstances change, these sites have significant water frontage and are strategically well placed to meet the needs of marine industry in the future. Likewise, should changes in future energy market lead to the availability of land presently occupied by the Fawley Oil refinery, this would also have significant strategic long-term potential. It may be sensible for policies to acknowledge that sites of such strategic significance to marine industry in the long term should be protected from loss to marine uses if circumstances change.

9.29 There is also further work to do to ensure that those sites that are identified fulfil their economic potential. SEEDA will need to give further careful strategic consideration to the list of sites identified with 'potential' to ensure that maximum value is secured for marine industry through their release. For example, at Daedalus further consideration is required of the options and viability of improving access to the waterfront and any enabling development requirements.

Other locally important sites

- 9.30 At the local level, we recommend that individual authorities identify locally significant existing or potential marine sites and provide clear policy support for their use for marine employment uses in the first instance either through site allocation, where appropriate, or the use of a criteria based policy restricting the use to which the site could be used. Local authorities should actively canvass the representative views of key marine cluster businesses as key stakeholders in formulating LDD policies. The specific land use requirements of the three core marine clusters should be assessed and LDD policies framed to meet specific needs.

Skills and Training***Recommendation 5***

- 9.31 ***SEEDA should further co-ordinate existing recruitment and skills programmes, along with identifying where further investment is necessary in the sub-region to address the marine skills base shortage.***

Implementation

- 9.32 There is currently considered to be a critical mass of people with relevant skills in the area and employer led training and coordination of existing skills and competitiveness programmes could maximise benefits and assist in the maintenance of a skills base in the area. We recommend that as an initial step SEEDA initiates the establishment of a marine skills forum with organisations already providing marine skills programmes in the Solent area including MEMSP, the Hampshire and Isle of Wight CoVE, the Regional Resource Centre and the Universities. This should have a practical focus on identifying, and planning provision for emerging skills requirements which firmly reflect market demand. The starting point for this should be a review of sub-regional circumstances relative to the training priorities identified by SEMTA (Sector Skills Council for Science, Engineering and Manufacturing Technologies) in the UK Marine Sector Skills Agreement. Particular consideration should be given to key priorities including:

- Reviewing the effectiveness of existing programmes relative to market needs.
- Ensuring effective mechanisms are put in place for institutions to operate and deliver training programmes in a coherent and integrated manner.
- Identification of measures to mitigate the effect of an ageing workforce, which without targeted efforts, will result not only in a contraction in the available workforce pool but a potentially acute shortage of key skills which are needed particularly for activities which demonstrate growth and diversification opportunities.
- Proactive marketing initiatives to encourage more high quality graduates and other young people into the sector especially with engineering and related qualifications.

- Actively encourage the establishment of more employer-led training initiatives including the pooling of workforce training provision which can benefit a range of marine and non-marine business sectors.
 - Focus on training programmes which are aimed at stimulating productivity gains in the sector. This should include high quality management and leaderships skills and training in lean manufacturing processes.
- 9.33 It will then be appropriate for SEEDA working with partner organisations and employers to provide a coherent marine skills programme and action plan for the Solent area which potentially could be rolled-out to other parts of the South East. This programme should have a sharp focus on demand-led skill requirements which can be adaptable to respond to changing priorities over time. In order to ensure programmes retain a strategic rationale, SEEDA should continue its involvement in the forum including a co-ordinating and monitoring role.
- 9.34 Future investment and funding in recruitment and skills programmes is likely to require a partnership approach between a number of different agencies, training providers and local employers. An investment package and identified funding sources will need to be agreed between the relevant partner organisations with responsibilities for implementation clearly identified.

Addressing the economic/environmental balance

Recommendation 6

- 9.35 ***SEEDA, PUSH and other relevant local authorities working in partnership with Natural England, the Environment Agency and key elements of the principal marine industries should assess the feasibility of creating new habitats on at least a Solent-wide basis as a compensatory measure for the effects of the needed expansion of the marine industry.***

Implementation

- 9.36 SEEDA and local authorities need to take the lead, in partnership with Natural England the Environment Agency and principal marine industries, in addressing the issues raised by the potential effects of the expansion of marine industries on designated and other sensitive coastal environments, particularly in the light of predicted sea-level rise.
- 9.37 A strategy is required, alongside that being developed to compensate for the loss of coastal habitats as a result of coastal protection works, for large scale habitat creation in compensation for development proposals that may have an adverse environmental impact on valuable ecological resources. The strategy should look at adopting a proportionate and practical approach to compensation. The results of this work should result in the insertion of appropriate policies in LDDs, and possibly even the identification of key compensation sites.

Providing Affordable Land and Premises

Recommendation 7

- 9.38 ***SEEDA should emphasise to relevant local authorities the need for affordable land supply for marine uses. SEEDA, PUSH and other relevant local authorities should assess the feasibility of a range of fiscal measures and policy mechanisms to bring forward a supply of affordable employment land suitable for marine industries.***

Implementation

- 9.39 The feasibility of securing affordable employment land for marine industry requires additional evaluation and study. We have identified a lack of affordable expansion or relocation sites or places where new marine industry ventures can be started. The fundamental requirement in making more affordable sites and premises available for marine businesses lies in the ability to agree and implement effective allocation and safeguarding policies such as those described earlier. Strong proactive allocation policies will be most effective if higher value (non-marine and usually non-employment) uses can be prevented from pricing-out small and medium sized businesses.
- 9.40 As previously highlighted where market failure is evident, SEEDA has a key role to play in actively facilitating the provision of land and premises for marine businesses in specified circumstances. Possible intervention measures that SEEDA and its partners could employ in order to make it viable for small and medium sized marine businesses to secure appropriate sites and premises (subject to State Aid rules) include measures such as gap funding, direct development, capital grants, joint ventures or low-cost loans.
- 9.41 Other mechanisms that could be put in place to assist with the provision of affordable premises include the ring-fencing of Section 106 funds from high value developments which may be used to plug the viability gap for some marine uses. Other forms of financial support that potentially could be used to support appropriate forms of economic marine development include the grants and programmes that will be forthcoming through the funding stream associated with the designation of PUSH as a new Growth Point location.

Response to Climate Change and sea level rise

Recommendation 8

- 9.42 ***SEEDA, PUSH and other relevant local authorities, and marine industries themselves should seek to educate relevant bodies and organisations to enable the identification of the potential long-term planning solutions required to address the likely impact of climate change in respect of sea level rise. At the very least it should be made a priority that marine sites of existing or potential national or regional significance are protected from the implications of sea level rise.***

Implementation

- 9.43 Whilst the implications of climate change for the Solent area are now better understood, there is as yet no clear response in spatial and economic policies to sea-level rise.
- 9.44 Over the coming decades, sea level rise is likely to have a significant effect on marine industry, with the potential long-term loss of parts of several sites currently in marine employment use. It is noted that such concerns already exist for example at Chichester and Lymington.
- 9.45 It would be prudent to ensure that future land-use decisions do not prejudice the ability to achieve the managed retreat of marine sites of national or regional significance and to develop policies accordingly to safeguard undeveloped 'backland' where it is possible to do so. Local authorities will also need to have greater regard for the long-term viability of proposals for new marine development on vulnerable sites in reaching determining future applications. An assessment may be required of whether the short and medium term economic advantages of development outweigh long-term risk. A long-term strategy ought to be in place to manage risk where development is permitted, whether flood defence measures, 'backland' availability or relocation opportunities.
- 9.46 Land reclamation may offer an alternative solution but will be more expensive and complex to achieve and may only offer a temporary respite.
- 9.47 There may be no other solution than large scale strategic flood protection schemes paid for by the public purse to safeguard major centres of population such Portsmouth, and to a lesser extent Southampton. Such scheme would help to protect marine industry operating in these areas.
- 9.48 Where marine businesses that do not require a waterfront location are vulnerable to sea-level rise, policies may need to look to re-locate these elsewhere; suitable sites will need to be identified.
- 9.49 There is also the question of how policies will develop in response to the potential loss of habitats, such as mudflats, through climate change. As discussed earlier, erosion of the existing coastline may remove existing environmental constraints to marine industry growth. Alternatively, habitat loss could simply be replaced by new initiatives by way of compensatory measures for habitat creation and re-creation that could continue restrict marine business growth. There is clearly an opportunity for partner organisations to ensure that any future strategy for habitat recreation and/or replacement can be successfully integrated with an economic strategy that facilitates growth of marine industry.
- 9.50 SEEDA should seek to influence the next round of Shoreline Management Plans (SMPs); the North Solent SMP is relevant to the Solent area in this case and work is being led by the New Forest District Council. Although non-statutory documents, SMPs have a much longer horizon than LDDs and are developing options for coastal protection and management including options for managed coastal realignment. SEEDA and PUSH should seek to ensure

that economic priorities and objectives as well as environmental protection and conservation objectives are delivered by the future SMP for North Solent. At the very least protection from the implications of sea level rise should be achieved for the identified marine sites of existing or potential national or regional significance in SMP's and coastal defence strategies.

Simplified, strengthened and more proactive administrative arrangements

Recommendation 9

- 9.51 ***Consideration should be given to the need to refocus support for marine industries. Existing bodies responsible for implementation of the marine planning consent procedures should be encouraged to work jointly to improve co-ordination and streamline and simplify decision-making for marine business.***

Implementation

- 9.52 The existing multiplicity of elected and publicly funded organisations with some responsibilities for the coastal zone and the waters of the Solent is a handicap to the development of positive policies to support marine industries. Currently, there are 13 planning authorities (14 if the regional planning body is included) and seven harbour authorities as well as Natural England, the Environment Agency and DEFRA. The process of policy making and implementation on the coast is hugely complex and opaque, and understandable to very few. It may be further complicated by the introduction of a marine management organisation as proposed by the Government through the Marine Bill, and the proposed setting up of an independent infrastructure commission under the Planning Reform Bill.
- 9.53 It is not for us to suggest a general review of the administration of the Solent, but we note that rationalisation of the decision-making process is required in order to implement the draft proposals of RSS for the sub region. We would see benefit in at least refocusing existing organisations to be to support and promote the Solent as a growth area for marine industries. However, in our view a more radical approach is required. This process could also usefully consider the need to identify a leader and Champion to co-ordinate the case and address the issues we have mentioned in this report, and to do so on a coherent and inclusive basis across the area and for all types of marine industries.

Long term Strategic Planning Requirements for the Solent

Recommendation 10

- 9.54 ***Strategic planning decisions for the Solent should be made in the interests of supporting the growth of marine industries and the organisational structure should be redefined to enable this to happen.***

Implementation

- 9.55 The study has shown that marine industries are embedded in the economic, environmental, transport and land use structure of the Solent, and that they are likely to be a significant source of the improved economic performance that underlies draft RSS's strategy for the sub region. However, there is very little evidence that marine industries' needs are currently understood by policy makers, or confidence that this position will change. Consequently, there is a danger that decisions on a number of matters relating to the development of the sub region area (and adjoining parts of the Isle of Wight, West Sussex and the New Forest that include elements of the Solent marine clusters) will continue to be taken without regard to the needs to encourage marine industries to grow. This would adversely affect the ability of marine industries to compete in a global market and therefore to contribute to the achievement of the aspirations for the local and regional economy.
- 9.56 It is apparent from the desk based analysis, the consultation sessions and the face-to-face interviews, that the implementation of a number of policies have already made it more difficult for some marine industries to thrive, or even to continue to operate. An obvious example is the encouragement for residential or other high value uses, either on waterfront sites that are themselves suitable for marine industries or on sites adjoining such activities.
- 9.57 For local authorities and other decision and policy-making bodies, the issue that arises is how the increased awareness of the need to support and growth marine industry assets should be put into place. It should clearly form one of the foundations for whatever body emerges to implement the sub regional proposals. The evidence of the study is that adjoining parts of the Isle of Wight, and the West Sussex and New Forest Coast should be considered alongside the PUSH area. This is particularly the case with parts of the Isle of Wight, which is a significant centre for marine industries.
- 9.58 We suggest that SEEDA should give further more detailed consideration as to whether a separate body should be established to further marine interests, which would contain its own expert team in association with key business and statutory partners. This has been done elsewhere, for example the Haven Gateway Partnership covers the five Haven ports of Felixstowe, Harwich International, Harwich Navyard, Ipswich and Mistley. Based on their central role as hubs and generators of economic activity, the Haven Gateway Partnership provides a framework within which its partner organisations - from the private and public sectors - can work together to promote economic opportunities and secure the future prosperity of the region. We consider that such a partnership involving all the marine interests of the Solent would be in a strong position to represent them in the planning process.