

Solent Local Enterprise Partnership

Transport Investment Plan for the Solent Area

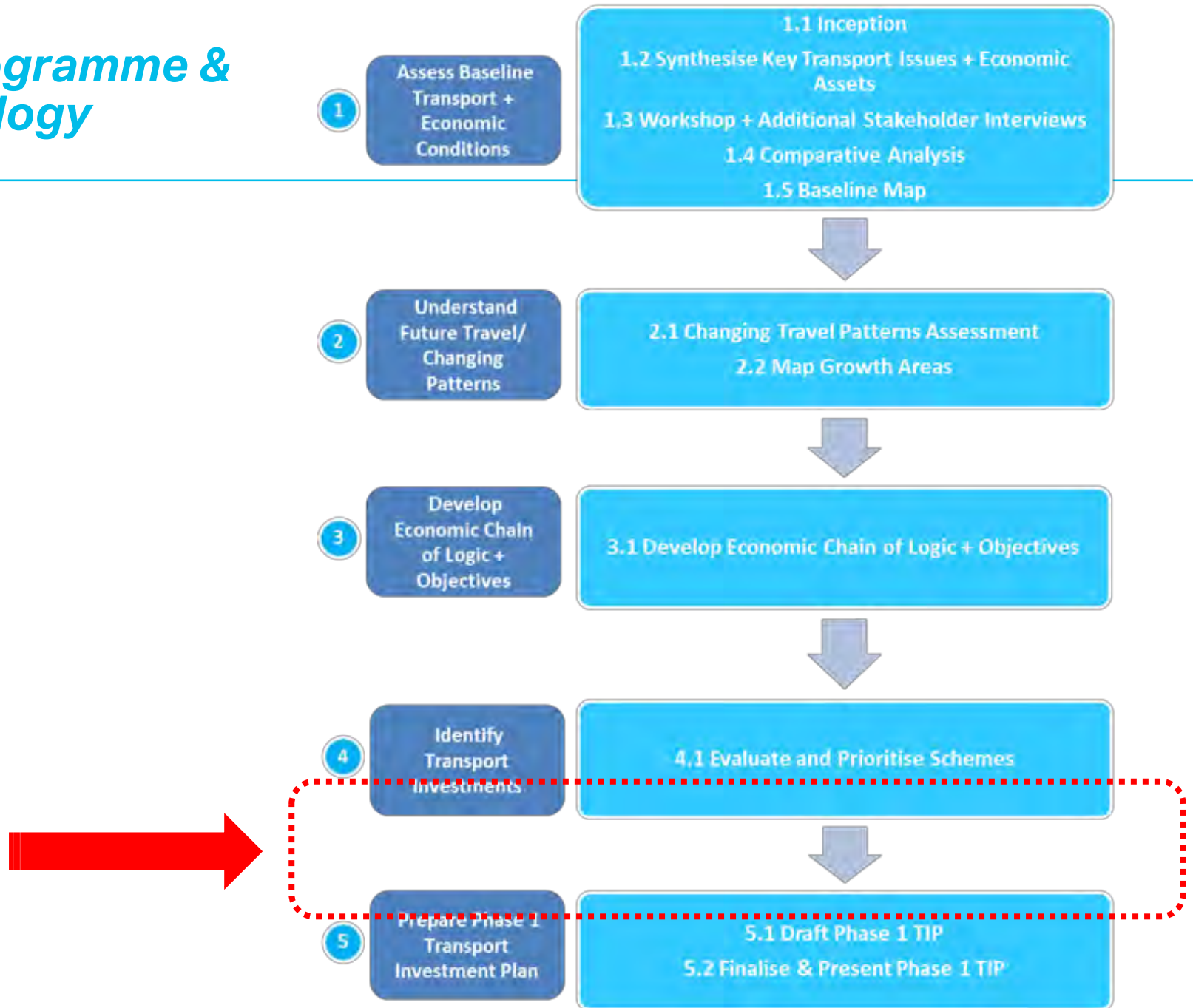
Emerging Findings
3 February 2016

Introduction

- The aim is the identification of the transformative and longer term investments to support and unlock the Solent's growth potential over the next 30 to 40 years.
- Explicit inputs and perspective of business community to develop a long term transport strategy to stimulate growth and raise productivity.
- Review of existing evidence base, current transport issues, development sites, city benchmarking and consultation with 86 organisations / MPs (Aug 2015 – Jan 2016).

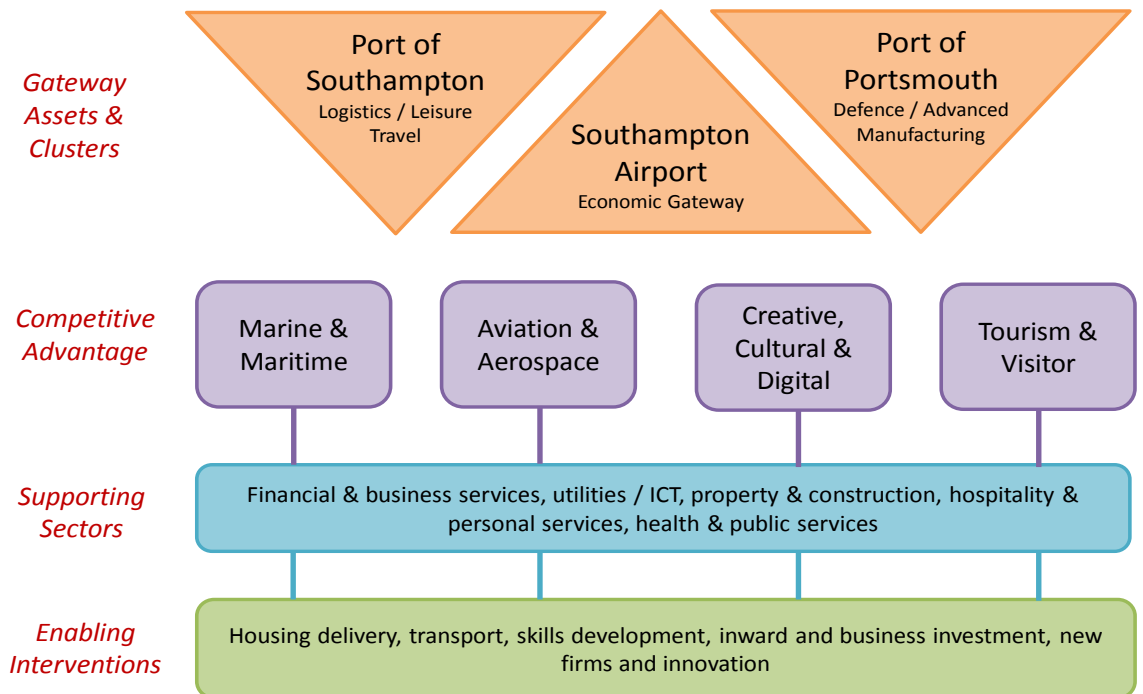


Work Programme & Methodology



Gateway based economic structure

- The Solent LEP is a significant sub-regional gateway economy with strengths across the private sector. At £25 billion (GVA) the economic output of the Solent LEP accounts for one sixth of the south east.
- The strengths include high technology clusters, the SME base and a strong higher and further education presence as well as natural assets of green infrastructure and an attractive quality of life.
- Key international firms include BAE Systems, IBM, Zurich, GKN, Airbus, Boeing, QinetiQ, Lockheed Martin, Carnival UK, Lloyd's Register, Astrium and Skandia.
- The three "ports" and their cities are linked to clustered sectors / concentrations of activity.
- Four other sectors have above average concentrations based on local competitive advantages.
- These are supported a wider supply chain that also meets local population based demand.
- More supply side interventions act as enablers supporting long term growth.



Geographical Constraints

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CONSULTANT

AECOM
 Mid City Place, 71 High Holborn
 London, WC1V 6EA
 +44 (0)20 7645 2000 tel
 +44 (0)20 7645 2099 fax
 www.aecom.com

PROJECT

Solent LEP Transport
 Investment Plan

KEY

- Solent LEP Boundary
- Motorway
- A Road
- B Road
- Railway Track
- Railway Station
- Coastline
- Waterbody
- National Park
- Sites of Special Scientific Interest
- Special Protection Area
- Special Area of Conservation
- National Nature Reserve
- Ramsar
- Marine Conservation Zone

Topography (m)
 High : 134.9
 Low : -39.6

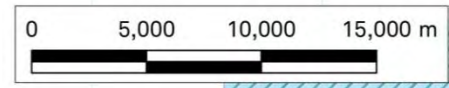
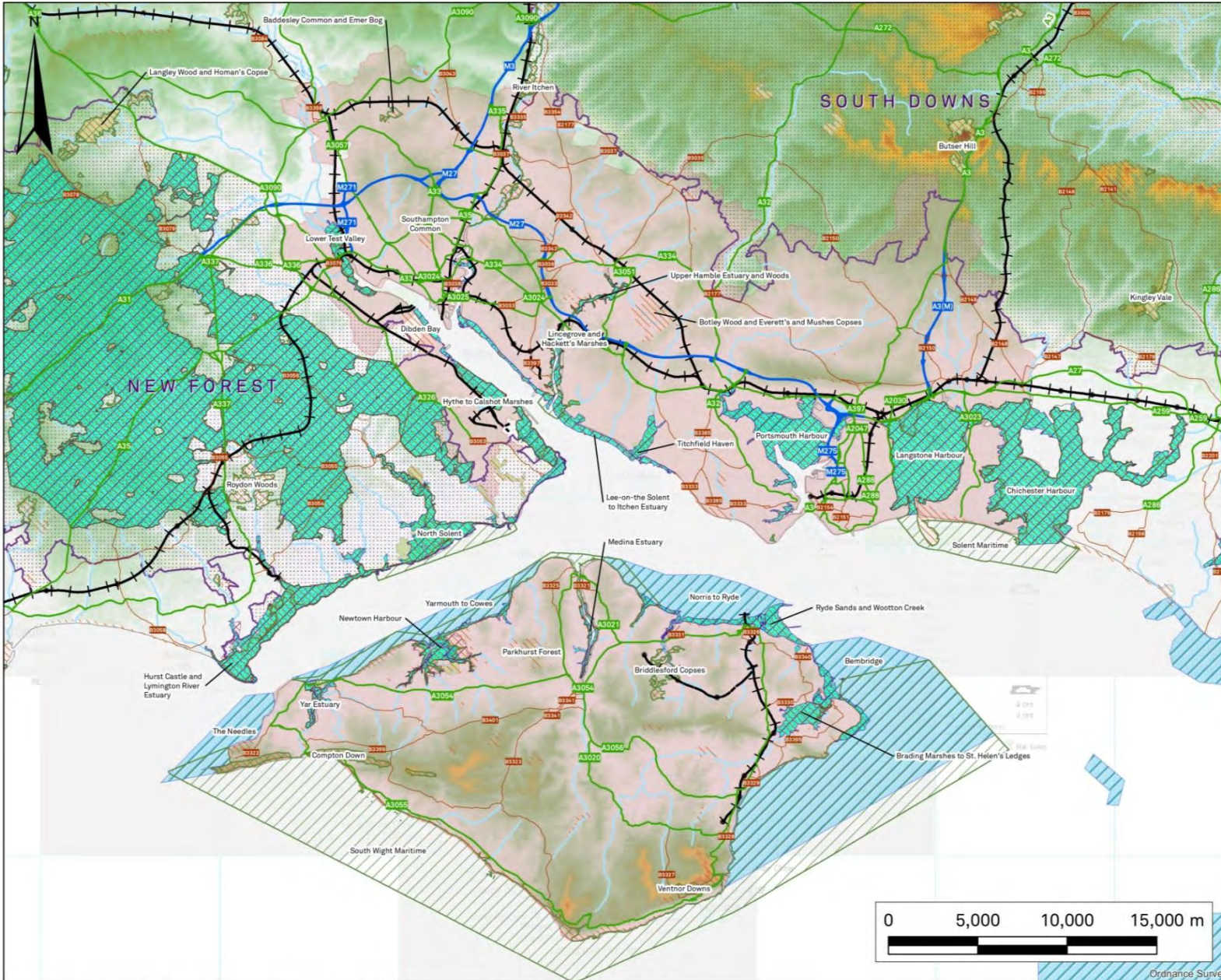


FIGURE TITLE

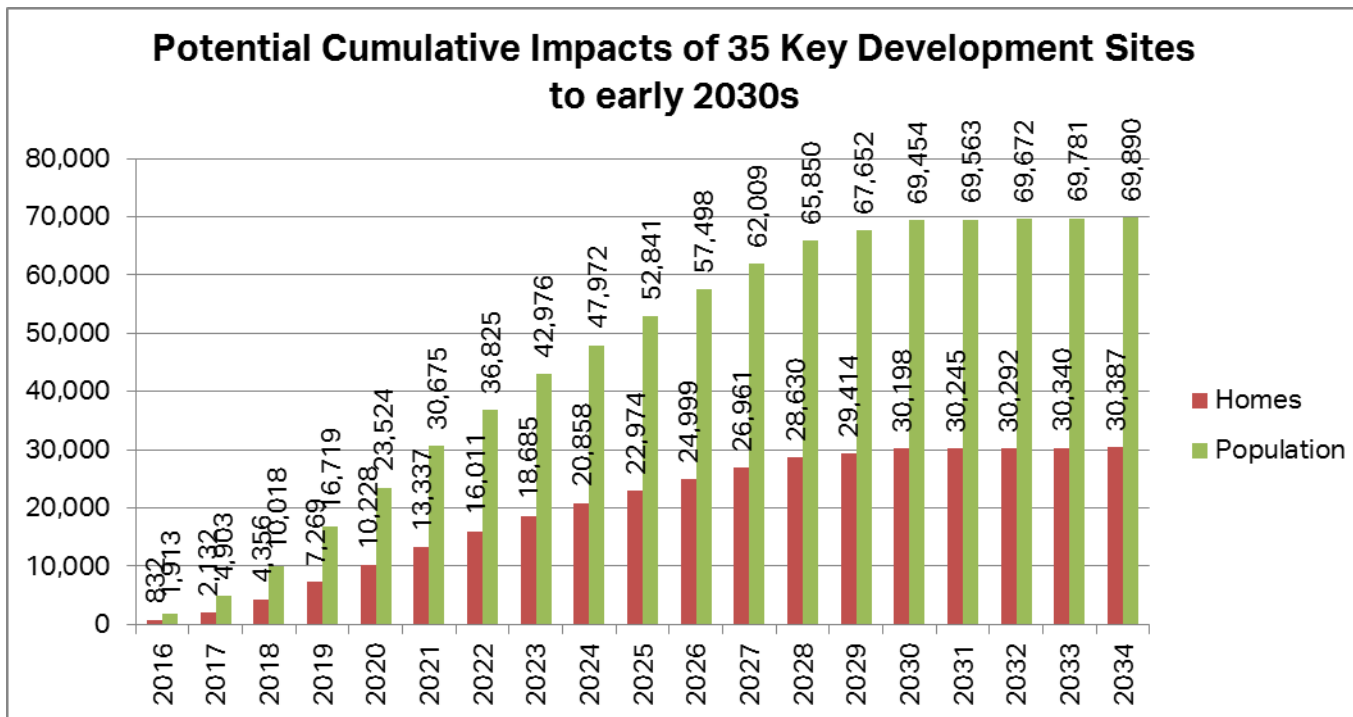
Solent LEP
 Constraints

SCALE

1:200,000@ A3

Future Demand

35 key sites could accommodate 30,400 homes, 70,000 new residents and 39,000 jobs by early 2030s.



There is significant growth potential across known and future development sites. This sets the agenda for future strategic transport investments.

- Across 35 major sites this could result in:
 - 30,400 new homes
 - 70,000 new residents
 - 39,000 additional jobs
- Excludes development on smaller sites / current PUSH review
- As well as in-migration demand from an ageing population and smaller households
- Need for transport modelling to reflect growth levels and geography

Changing Travel Patterns – 2011 Origin-Destination summary map

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PROJECT

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KEY

- Solent LEP Boundary
- Borough Boundary
- Internal moves > 50%
Proportion of people residing in the borough and working in the same
- Internal moves < 50%
Proportion of people residing in the borough and working in the same
- Intra Solent important moves :
proportion of people residing in a Solent borough and working in another
- Extra Solent important moves :
proportion of people living in a Solent borough and working out of the Solent area
- Extra Solent important moves :
proportion of people working in a Solent borough and living out of the Solent area

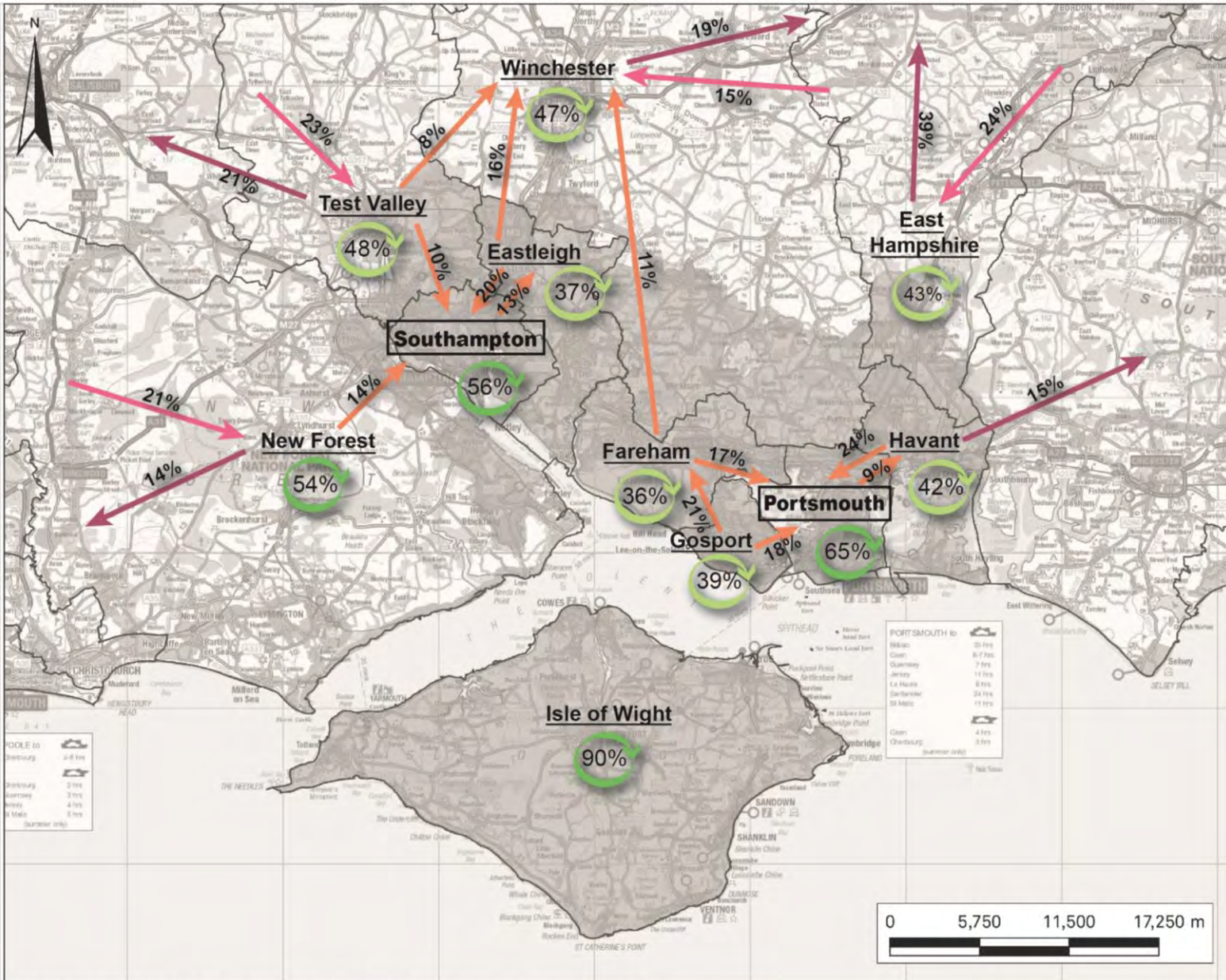


FIGURE TITLE

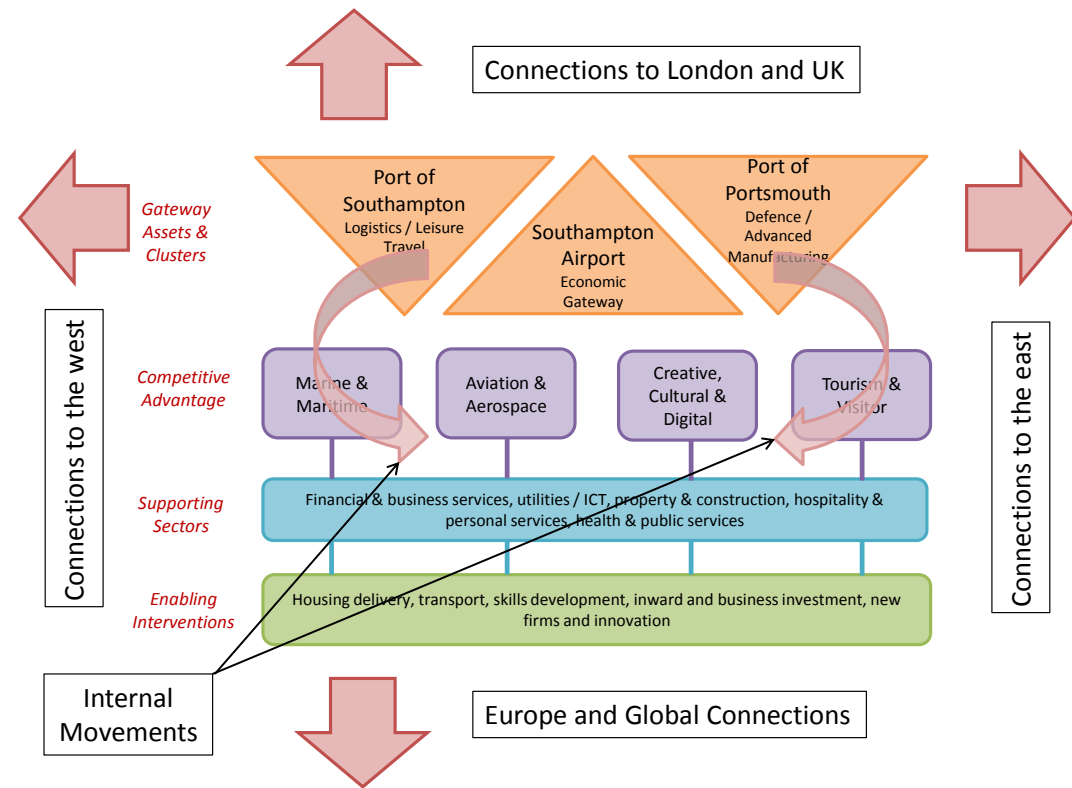
Basemap

SCALE

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Transport Aim = "Increase Economic Proximity"

- The transport strategy should aim to "increase economic proximity" using 5 zones and 6 external strategic corridors
- High value businesses derive benefits from being located in close proximity to each other and their workers (locally and strategically).
- With 37% of all high skilled employment in Portsmouth and Southampton, the two cities are well placed to drive growth in the private knowledge-intensive industries that often link to local competitive advantages. Objectives:
 1. Increase **dual city linkages** around public transport and business critical movements to integrate labour and consumer markets, remove barriers to trade and reduce business travel costs.
 2. Support **clustering** and agglomeration around key local strengths and competitive advantages that other areas cannot replicate (e.g. port functions).
 3. Develop a **corridor of development nodes** based around high capacity high speed public transport between the cities and across the urban network to 2040 .
 4. Optimise and **integrate the transport network** (ticketing, information and operation) so travel demand load can be spread to improve resilience and peak capacity accommodated especially in more constrained cities with pinchpoints. Reduces the need for demand management and charging.



5. Secure **improved strategic connections** to London, the south east (airport passenger market), the UK (especially for port freight) and internationally for airport leisure and business market and "European" inward investment. Further reduce barriers to trade and secure market expansion that enhances exporting potential of local high value products and services.
6. A greater focus on **Transport Orientated Developments (TODs)**. Increase residential densities around new and underutilised transport nodes to accommodate additional housing development while protecting natural assets and maintaining affordability with the same land take. This improves the return on investment on public transport investments and protects high quality environmental and landscape assets which form a key part of the locational offer of the Solent area.

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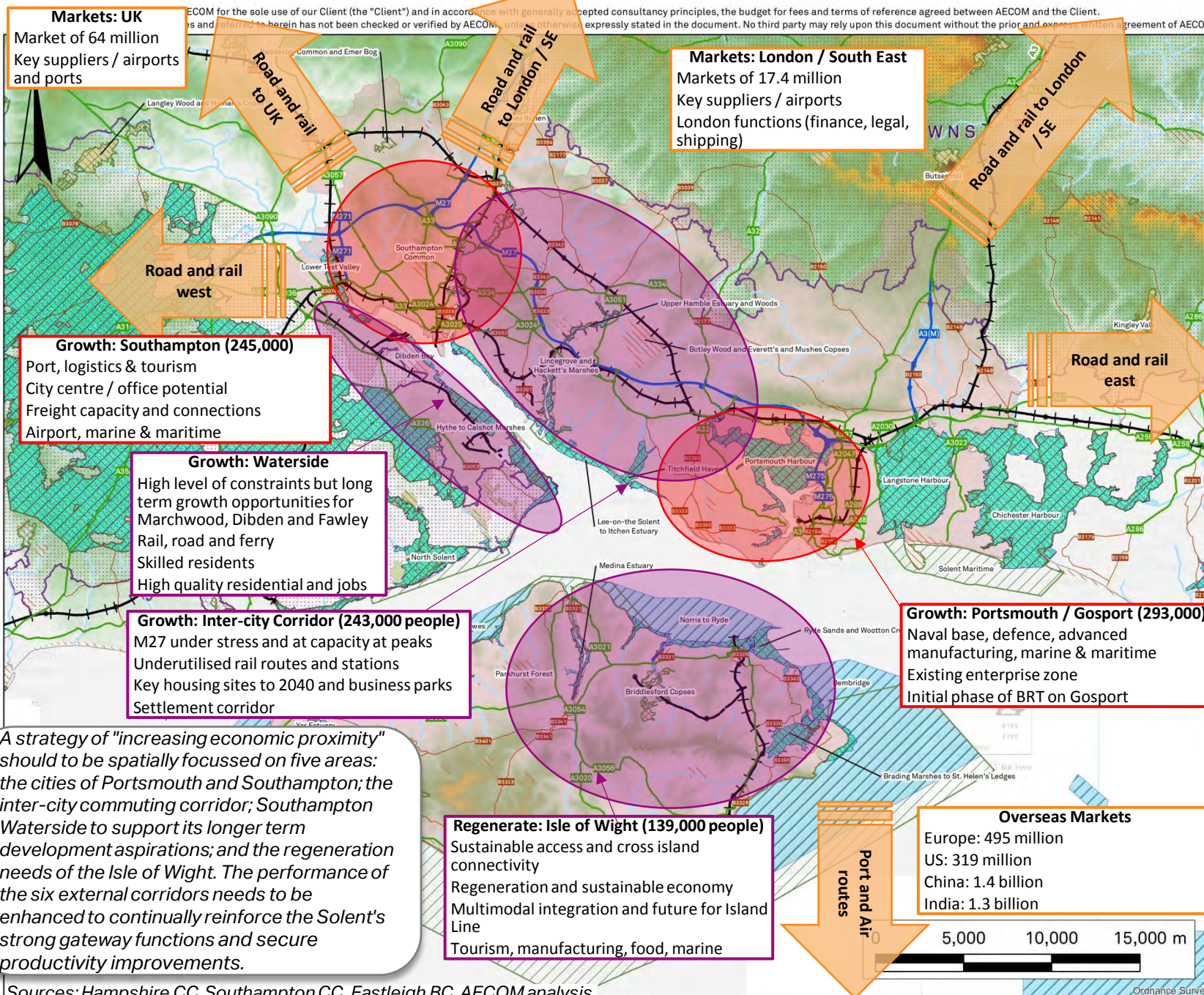
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Solent LEP Transport
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KEY

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- Railway Station
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- Waterbody
- National Park
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- Special Protection Area
- Special Area of Conservation
- National Nature Reserve
- Ramsar
- Marine Conservation Zone

Topography (m)
 - High : 1344.9
 - Low : -39.6



Markets: UK
 Market of 64 million
 Key suppliers / airports
 and ports

Road and rail
 to UK

Road and rail
 to London / SE

Markets: London / South East
 Markets of 17.4 million
 Key suppliers / airports
 London functions (finance, legal,
 shipping)

Road and rail to London
 / SE

Road and rail
 west

Growth: Southampton (245,000)
 Port, logistics & tourism
 City centre / office potential
 Freight capacity and connections
 Airport, marine & maritime

Growth: Waterside
 High level of constraints but long
 term growth opportunities for
 Marchwood, Dibden and Fawley
 Rail, road and ferry
 Skilled residents
 High quality residential and jobs

Growth: Inter-city Corridor (243,000 people)
 M27 under stress and at capacity at peaks
 Underutilised rail routes and stations
 Key housing sites to 2040 and business parks
 Settlement corridor

Road and rail
 east

Growth: Portsmouth / Gosport (293,000)
 Naval base, defence, advanced
 manufacturing, marine & maritime
 Existing enterprise zone
 Initial phase of BRT on Gosport

Regenerate: Isle of Wight (139,000 people)
 Sustainable access and cross island
 connectivity
 Regeneration and sustainable economy
 Multimodal integration and future for Island
 Line
 Tourism, manufacturing, food, marine

Port and Air
 routes

Overseas Markets
 Europe: 495 million
 US: 319 million
 China: 1.4 billion
 India: 1.3 billion

A strategy of "increasing economic proximity" should be spatially focussed on five areas: the cities of Portsmouth and Southampton; the inter-city commuting corridor; Southampton Waterside to support its longer term development aspirations; and the regeneration needs of the Isle of Wight. The performance of the six external corridors needs to be enhanced to continually reinforce the Solent's strong gateway functions and secure productivity improvements.

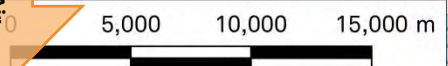


FIGURE TITLE
 Economic proximity

SCALE
 1:200,000@ A3

Sources: Hampshire CC, Southampton CC, Eastleigh BC, AECOM analysis
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Key Findings

- The Solent area could grow to a region of 2 million in the next 30 to 40 years on the basis of past and current growth.
- Economic forecasts suggest that population growth could be even higher than current plans to support an additional 60,000 jobs.
- Forecasts suggest increasing congestion problems on the road network will increasingly affect commuting and key business routes impacting on productivity.
- More people are now travelling across the urban network in the Solent to jobs outside the cities and between housing markets.
- Constrained by various designations - many of the development sites are reliant on road based solutions.
- While the area is growing faster than other dual city areas an all infrastructure deficit exists despite the national port functions
- Better connections between the cities would support agglomeration and clustering.

Transport investment packages

Introduction

- The LEP is seeking to focus on the more economic transformative, step-change and longer term investments to support and unlock the Solent's growth potential over the next 30 to 40 years and to raise productivity.
- Over this timescale an additional 300,000 to 400,000 residents could make the Solent an area of 2 million people – equivalent to dual cities such as Nottingham/Derby and Newcastle/Sunderland.
- We have reviewed the existing evidence base that has (a) assessed and modelled local issues and (b) proposed a range of potential schemes for the Solent area.
- We have brought together some of these proposals and other suggestions from the stakeholder consultation into initial packages of more strategic investments.
- These are split into an initial Phase 1 covering five years to 2020 (short term) and then 20 years over Phase 2 (medium term) to give a 25 year plan to 2040 to align with normal planning timescales.
- Our approach has been to pragmatically build on known investments and directions of travel while seeking to maximise the performance of existing infrastructure.
- The investments have been split as follows and offer the opportunity to be supported by an evolution of the local governance and delivery function drawing from the proposed HIOW local devolution agenda:
 - Roads
 - Strategic Rail
 - Solent Transit
 - Airport
 - Port
 - Governance and Delivery

Planned Strategic Highway Schemes

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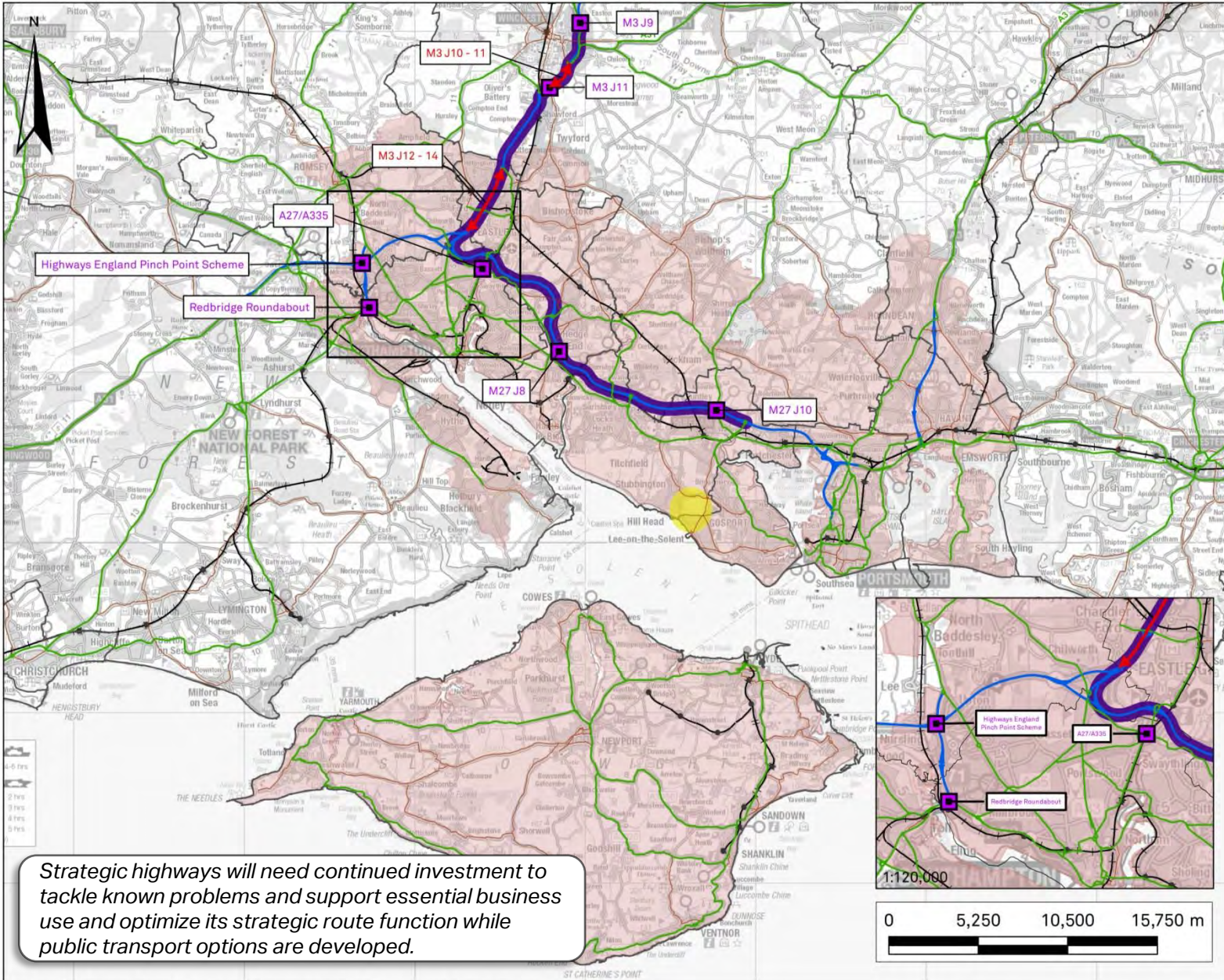
AECOM
 Mid City Place, 71 High Holborn
 London, WC1V 6EA
 +44 (0)20 7645 2000 tel
 +44 (0)20 7645 2099 fax
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PROJECT

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KEY

- Solent LEP Boundary
- Borough Boundary
- Enterprise Zone
- Motorway
- A Road
- B Road
- Railway Track
- Railway Station
- Highway Improvement Scheme
- Junction Improvement
- Highways England Smart Motorway



Strategic highways will need continued investment to tackle known problems and support essential business use and optimize its strategic route function while public transport options are developed.

FIGURE TITLE

Planned Highway
 Motorway Schemes

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Proposed Fast Train Services

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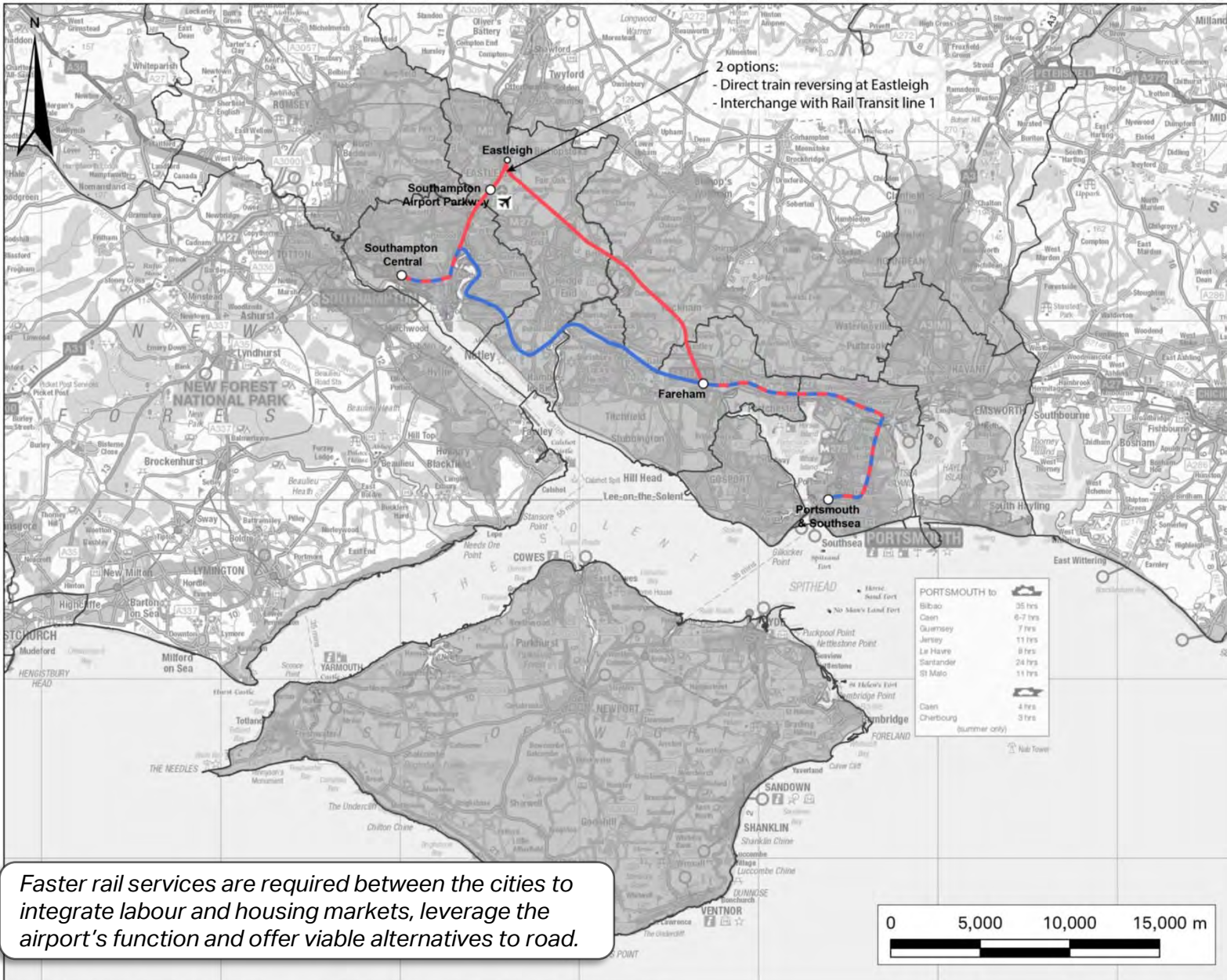
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 Mid City Place, 71 High Holborn
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PROJECT

Solent LEP Transport
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KEY

- Solent LEP Boundary
- Borough Boundary
- Fast service Portsmouth-Southampton Airport
- Fast service Portsmouth-Southampton central
- Tracks used by both services



Faster rail services are required between the cities to integrate labour and housing markets, leverage the airport's function and offer viable alternatives to road.

FIGURE TITLE

Intercity services

SCALE

1:200,000@ A3

Proposed Solent Transit Network

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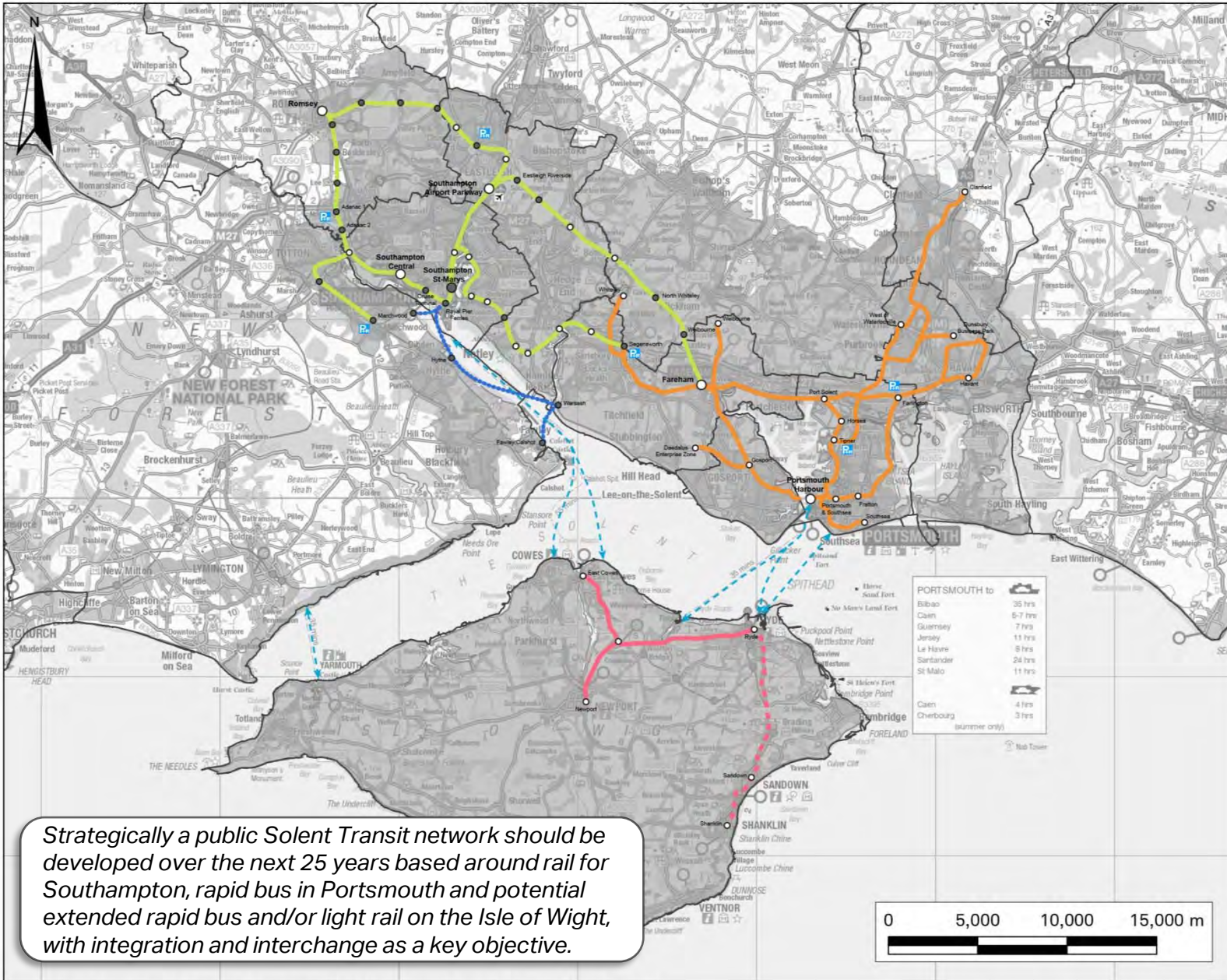
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PROJECT

Solent LEP Transport
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KEY

- Solent LEP Boundary
- Borough Boundary
- Existing Passenger Ferries
- Solent Rail Transit
- Solent Bus Rapid Transit
- IoW Bus Rapid Transit
- IoW Potential section of Rail Rapid Transit
- Solent Fast Ferry services
- Existing Hub
- Existing Stop
- New Hub
- New Stop



Strategically a public Solent Transit network should be developed over the next 25 years based around rail for Southampton, rapid bus in Portsmouth and potential extended rapid bus and/or light rail on the Isle of Wight, with integration and interchange as a key objective.

FIGURE TITLE
 Solent Transit Network

SCALE
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Proposed Solent Rail Transit Network

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PROJECT

Solent LEP Transport
 Investment Plan

KEY

- Solent LEP Boundary
- Borough Boundary
- Line 1: Southampton Central to Fareham via Southampton Port and airport
- Line 1 Street-running section
- Line 2: Southampton St-Marys to Segensworth Park and Ride
- Line 3: Southampton Central to Romsey via Adanac Park
- Line 4: Romsey to Eastleigh
- Line 5: Redbridge to Marchwood

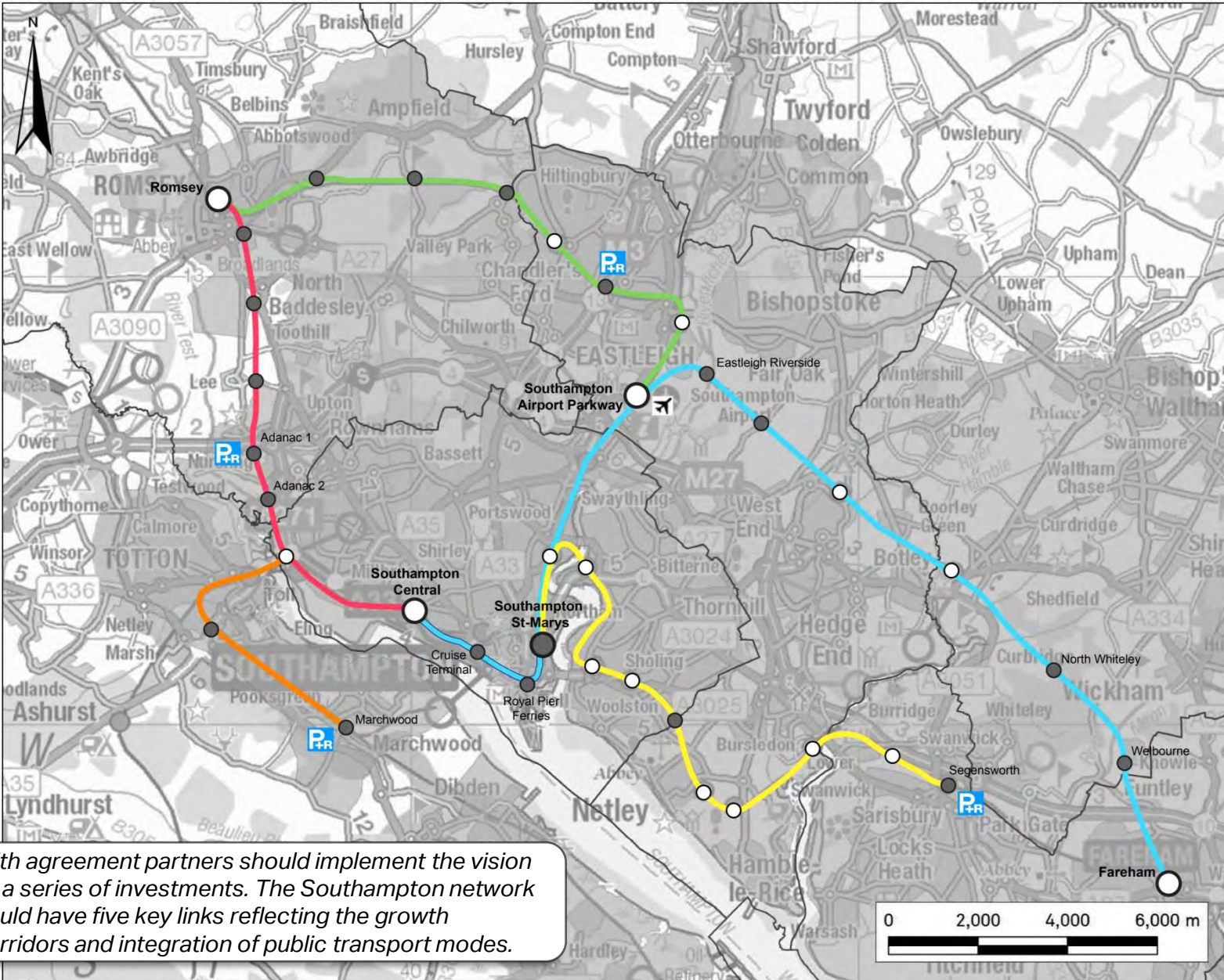
- Existing Hub
- New Hub
- Existing Stop
- New Stop
- Park and Ride

FIGURE TITLE

Solent Light Rapid Transit Network

SCALE

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With agreement partners should implement the vision as a series of investments. The Southampton network could have five key links reflecting the growth corridors and integration of public transport modes.

Proposed Solent Bus Rapid Transit Network

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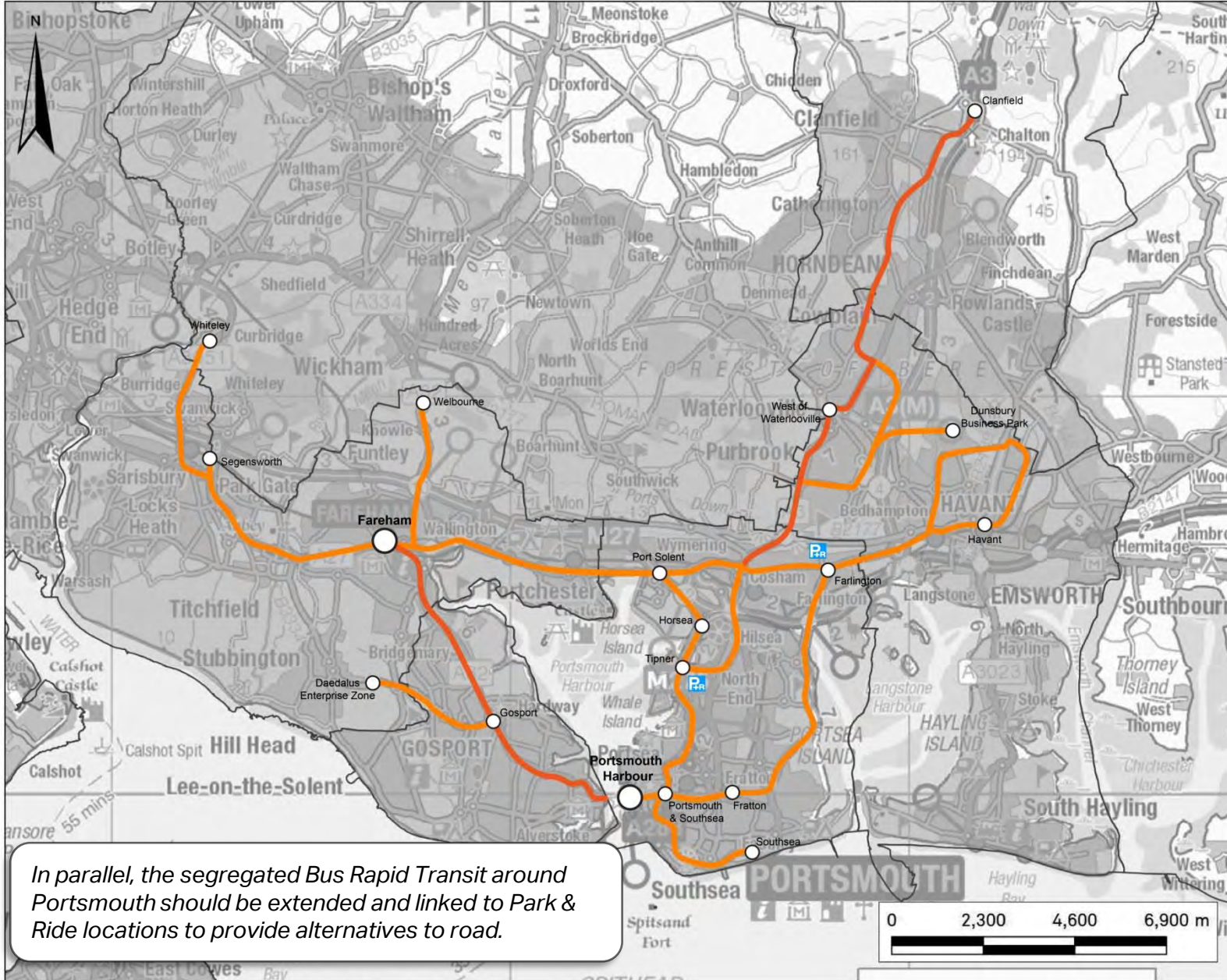
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PROJECT

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KEY

- Solent LEP Boundary
- Borough Boundary
- Solent BRT Network
- Existing section of the Solent BRT Network
- Hub
- Stop



In parallel, the segregated Bus Rapid Transit around Portsmouth should be extended and linked to Park & Ride locations to provide alternatives to road.

FIGURE TITLE

Solent Bus Rapid Transit Network

SCALE

1:90,000 @ A3

Solent Transit Network

