

Hampshire and the Solent Infrastructure Priorities

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Executive Summary

This Infrastructure Study provides a comprehensive assessment of the employment land, digital infrastructure, and transport challenges currently facing Hampshire and the Solent, compiled from existing available evidence. It identifies the targeted investments required to secure sustainable economic growth across Hampshire, Southampton, Portsmouth and the Isle of Wight.

Economic and Spatial Overview

Hampshire and the Solent contains two major coastal cities - Southampton in the south-west and Portsmouth in the south-east plus Winchester to the north. There are a number of larger towns within Hampshire and the Solent including Basingstoke, Eastleigh, Gosport, Farnborough, Aldershot, Andover, Alton, Fleet, Havant and Fareham.

Hampshire and the Solent forms a large, dynamic and high-value economy, supporting 76,600 enterprises, around 1 million jobs, and generating £72.6 billion GVA¹ – the largest sub-regional economy in the South East outside London. Long-term GVA growth has consistently outperformed the national average, underpinned by specialist clusters in the eight key sectors of marine and maritime; aerospace, space and defence; digital and technology; life sciences; creative industries; logistics; professional business services; and visitor economy. Productivity across most areas exceeds UK benchmarks, with Rushmoor demonstrating the highest productivity outside London.

Employment Land and Development

While overall land allocations are broadly sufficient, the primary constraint within Hampshire and the Solent is the quality and viability of commercial space, particularly within the office market. Much of the existing stock is outdated, and viability gaps make new high-quality development increasingly challenging to deliver. Businesses – especially those in high-value, innovation-led sectors – face a shortage of flexible, sustainable and fit-for-purpose space.

Strategic and spatial priorities:

To support delivery of high-quality employment space and remove a potential barrier to further economic growth in the sub-region, it is critical that the public sector establish the conditions for private investment into high quality employment space, either through:

- Reducing the **viability gap** for private investors/developers to deliver new build or refurbished business space (e.g. via infrastructure gap funding).
- Undertaking **public sector-led speculative development**.

This will require adoption/expansion of financial and funding mechanisms to support public investment, including business rate retention and wider land value capture mechanisms.

On a spatial level, a number of development sites (see *Strategic Development Sites* below) have been identified, assessed and reported as key to support the economic development of the sub-region.

Digital Infrastructure

Despite strong headline gigabit availability, the region faces material gaps in digital quality, resilience and industrial-grade capability. Industrial estates, logistics corridors, ports, defence clusters, rural villages and

¹ Hampshire Skills Strategy Annex 1: Hampshire Skills Evidence Base (September 2025)
<https://democracy.hants.gov.uk/documents/s141293/Skills%20Strategy%20-%20Annex%201.pdf>

digitally excluded urban areas lack the connectivity required for modern operations, automation and innovation. These constraints limit productivity and inward investment potential.

Strategic digital priorities include:

- Strengthening **full-fibre resilience** across economic hubs.
- Deployment of **private 5G and advanced wireless** in ports, industrial sites and defence clusters.
- Investment in **local edge data centres** to reduce reliance on London-based compute.
- Accelerating gigabit rollout and **closing digital inclusion gaps** in rural and urban areas.
- Embedding **smart, future-ready digital infrastructure** into all new developments.
- Establishing a **Freeport-wide digital spine** for seamless logistics and customs integration.

Transport Infrastructure

Transport connectivity varies considerably across the region. While Southampton and Portsmouth benefit from good modal coverage, large areas – particularly rural and coastal communities – experience poor public transport, limited active travel provision, and resilience challenges. Growing freight demands linked to the ports and constraints on electrification due to grid capacity further exacerbate pressures.

Priority themes include:

- Development of **Mass Transit systems** and **rail improvement** across the Solent and Basingstoke.
- **Improved access** to the Waterside (A326 and potential rail reopening) and connectivity to the Gosport and Haslar peninsula.
- Enhanced **freight and international gateway infrastructure**, including rail freight capacity and improved access to Heathrow.
- **Active travel enhancements** to support modal shift within urban centres.
- **Decarbonisation measures**, including rail electrification and EV infrastructure.
- Delivery of **mobility hubs** at key interchange locations.

Strategic Development Sites

Development sites have been identified within this study through reviewing the major sites listed in current Local Plans and evidence bases (see Figure 2-18). From this long list, a smaller set of strategic development sites (see Figure 2-19) was selected by focusing on locations with special regeneration or development designation (e.g. enterprise zone, freeport) or with most transformational potential (e.g. major urban and brownfield regeneration schemes). The review to identify strategic sites also considered the geographic distribution of 'key specialist sectors', 'potential growth and opportunity sectors' and 'strategic sectors' within the Hampshire and the Solent context. The 'strategic sites' all focus on supporting at least one of the sub-sectors sitting within the sectoral typology (see Table 2-2) (e.g. Aerospace, Space and Defence or Professional Business Services). Other considerations included the development status of the sites and scale of the sites.

These strategic development sites identified are:

- | | | |
|---------------------|----------------------------|------------------------------------|
| ▪ Dunsbury Park | ▪ Fawley Waterside | ▪ Tech Forest |
| ▪ Mayflower Quarter | ▪ Southampton Airport | ▪ Portsmouth Lakeside |
| ▪ Centenary Quay | ▪ Daedalus Enterprise Zone | ▪ Tipner West & Horsea Island East |
| ▪ Solent Gateway | ▪ Basing View | |

These sites hold substantial economic potential for the sub-region and, with investment in transport access, digital capability, and other infrastructure such as utilities and environmental provision, provide significant opportunities to support high-value growth across Hampshire and the Solent. While these strategic development sites highlight key opportunities for investment, they do not limit or preclude development elsewhere in the region noting there will be other sites that offer valuable local / regional outcomes.

Conclusion

The study has focused on existing evidence that is publicly available to provide a foundation for priorities in the sub-region.

Hampshire and the Solent have strong economic fundamentals, but the quality, viability and readiness of key infrastructure elements threaten to limit future growth. Infrastructure priorities have been established against three key disciplines – employment land, digital and transport. These three disciplines, whilst considered separately in this study initially, have obvious overlap and are key components to ensure continued economic growth across the Hampshire and Solent area. Addressing gaps in employment land quality, digital resilience and modern transport provision will be critical. Targeted, coordinated public-sector investment in the key strategic sites outlined in this report will play a pivotal role in unlocking private investment, enhancing competitiveness, and delivering economic growth across the region.

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Acronyms and Abbreviations

Acronym	Definition
AI	Artificial Intelligence
BDUK	Building Digital UK
BEIS	(Department for) Business, Energy & Industrial Strategy
BREEAM	Building Research Establishment Environmental Assessment Method
CBD	Central Business District
CHP	Combined Heat and Power
CO ₂	Carbon Dioxide
DAS	Distributed Antenna System
DDRT	Digital Demand Responsive Transport
DfT	Department for Transport
DSTL	Defence Science and Technology Laboratory
ESG	Environmental, Social, Governance
EZ	Enterprise Zone
FCERM	Flood and Coastal Erosion Risk Management
FTTP	Fibre to the Premises
Gbps	Gigabits per second
GEA	Gross External Area
GVA	Gross Value Added
ha	Hectares
HCC	Hampshire County Council
HGV	Heavy Goods Vehicle
IMD	Index / Indices of Multiple Deprivation
HPC	High Performance Computing
HPPB	Hampshire Prosperity Partnership Board
IoT	Internet of Things
JANET	Joint Academic Network
LCWIP	Local Cycle & Walking Improvement Plan
LSOA	Lower Super Output Area
LTP	Local Transport Plan
MICE	Meetings, Incentives, Conferences and Exhibitions
MoD	Ministry of Defence
mW	Megawatt
ONS	Office for National Statistics
P&R	Park & Ride
PfSH	Partnership for South Hampshire
RTPI	Real Time Passenger Information
R&D	Research and Development
SEND	Special Educational Needs and Disabilities
SHELAA	Strategic Housing and Economic Land Availability Assessment
SINC	Sites of Importance for Nature Conservation
SLA	Service Level Agreement
SME	Small-Medium Sized Enterprise
sq m / ft	Square metre (m ²) / foot

Acronym	Definition
SRN	Strategic Road Network
SSSI	Site of Special Scientific Interest
UAV	Unmanned Aerial Vehicle
UA	Unitary Authority
VOA	Valuation Office Agency
ZEBRA	Zero Emission Bus Regional Area

1. Introduction

1.1 Background

In order to better understand infrastructure challenges and to identify investment opportunities, Hampshire County Council, on behalf of the Hampshire Prosperity Partnership Board (HPPB), have commissioned a study to explore key infrastructure deficits and opportunities. The purpose of this study is to develop an understanding of investment priorities with respect of three key types of infrastructure:

- Employment land and development
- Digital infrastructure
- Transport Infrastructure

1.2 Scope

The geographical scope of this study is the current Hampshire County Council administrative area, plus the Southampton, Portsmouth and Isle of Wight Unitary Authority areas (collectively referred to henceforth as Hampshire and the Solent).

1.3 Report Structure

The remainder of this report is structured to align with the three discipline areas outlined above:

- Section 2: Employment Land and Development
- Section 3: Digital Infrastructure
- Section 4: Transport Infrastructure
- Section 5: Summary and Conclusions

2. Employment Land and Development

2.1 Introduction

This section sets out the economic context, real estate and property market context and planning context within Hampshire and the Solent. It identifies the key challenges to employment land and development and sets out strategic and focused priorities to address these challenges.

2.2 Economic Context

2.2.1 Overview

The Hampshire and Solent region supports a diverse economy underpinned by a unique blend of coastal spaces, rural landscapes, national parks, and major industry clusters. Its dynamic business sectors, innovation assets, highly skilled workforce, global connectivity and natural capital mean that the region is positioned to drive economic growth and development.

Hampshire and the Solent's economy comprises:

- 76,600 enterprises (and approximately 100,000 local units) across a diverse range of sectors, including marine / maritime, life sciences and professional business services.
- Approximately 1 million jobs; with the highest job densities in Portsmouth, Southampton, Test Valley and Winchester.
- £72.6 billion in Gross Value Added (GVA) (2023 prices); representing the largest sub-regional economy in the South East of England, as well as an economy greater than the North East of England.
- Between 1998 and 2023, Hampshire and the Solent's aggregate GVA has grown at a faster rate than the UK average, with a 3.9% compound annual growth rate. The UK overall has seen slower aggregate GVA growth, with a 1.7% annual growth rate, over the equivalent period.
- Specialisation of labour force / businesses in the following key sectors:
 - Marine and Maritime (Southampton, Portsmouth, Isle of Wight)
 - Aerospace, Space and Defence (Rushmoor, Portsmouth, Fareham, Gosport)
 - Digital and Technology (Rushmoor, Basingstoke and Deane, Winchester)

2.2.2 Business and Employment Profile

Hampshire and the Solent is home to a diverse business base with nearly 100,000 local units. It is home to many national and multinational companies, including B&Q, Carnival UK, CooperVision, Draper Tools, Eli Lilly, Garmin, IBM, Motorola Solutions, Onecom, Ordnance Survey, Philip Morris International, Siemens, Unilever and Vestas Blades UK, among others.

In terms of business distribution across the sub-region (Figure 2-1), Winchester has the largest proportion of total businesses (11%), whilst Gosport makes up the smallest proportion of total businesses (2%).

The business base supports around 1 million jobs across Hampshire and the Solent. More than 10% of the sub-region's total employment (Figure 2-2) is located in the major settlements, Southampton, Portsmouth and Winchester (13%, 12% and 11% respectively). Gosport, meanwhile, accounts for just 2% of Hampshire and the Solent's total employment.

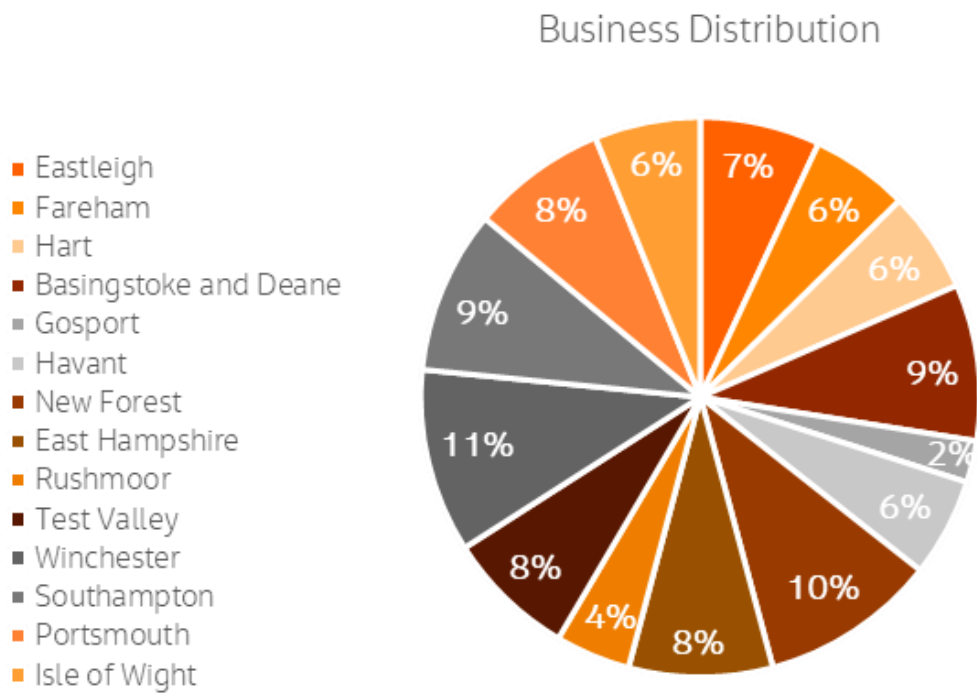


Figure 2-1: Split of business distribution by local authority (Source: ONS Business Counts 2025)

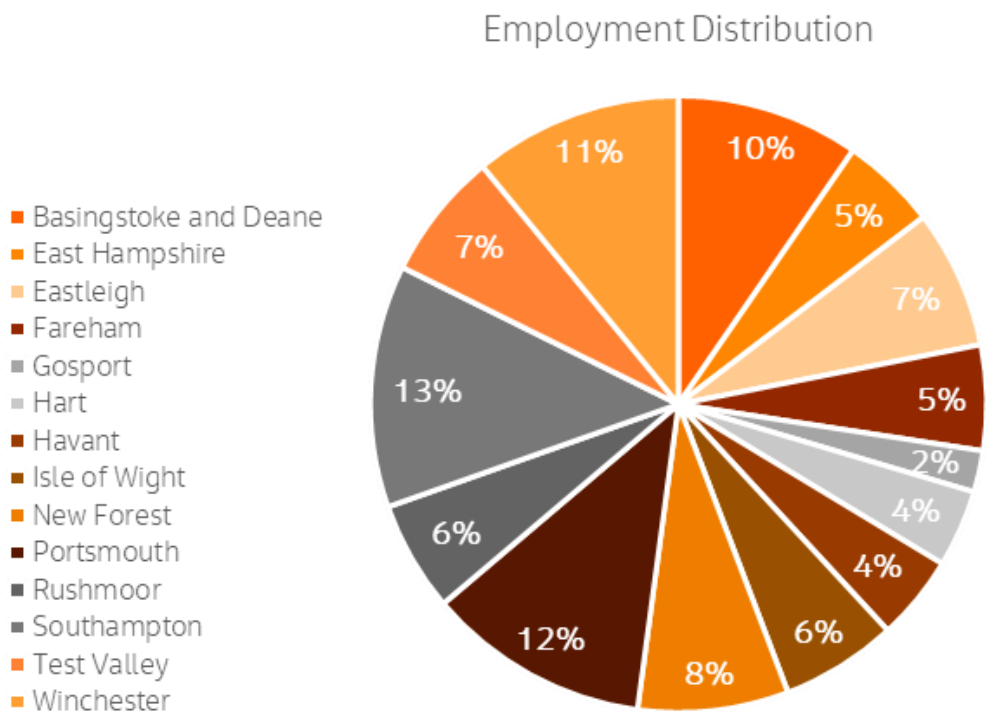


Figure 2-2: Split of employment distribution by local authority (Source: ONS Business Register and Employment Survey (2024))

2.2.3 Productivity

Hampshire and the Solent represents one of the most productive sub-regions in the UK outside of London in terms of aggregate Gross Value Added (GVA) and GVA per-worker.

Aggregate GVA:

- Hampshire and the Solent GVA amounted to £72.6 billion in 2023. GVA was concentrated in the major cities (i.e. Portsmouth and Southampton) and locations abutting Thames Valley and Surrey (i.e. Basingstoke and Deane and Rushmoor).
- With the exception of Isle of Wight, labour productivity in the constituent authorities of Hampshire and the Solent is in line with or exceeds the national (UK) average. The Isle of Wight's below average productivity may be explained by its reliance on the seasonal visitor economy.
- Productivity in Rushmoor is around twice the national average. Further, Rushmoor is the most productive local authority in the UK outside of London which may be explained by the large concentration of employment in highly productive sectors (e.g. digital & technologies).

GVA Per Worker (per filled job):

- The sub-region's GVA per worker was comparable to the UK average up to 2016, before accelerating post-2016.
- Between 2002 and 2023, Hampshire and the Solent recorded a 3% annual growth rate in GVA per worker this is greater than the 2.7% UK average growth rate.
- As of 2023, Hampshire and the Solent's GVA per worker is £70,522, compared with the UK average of £66,402.

These trends are outlined in Figure 2-3 to Figure 2-5.

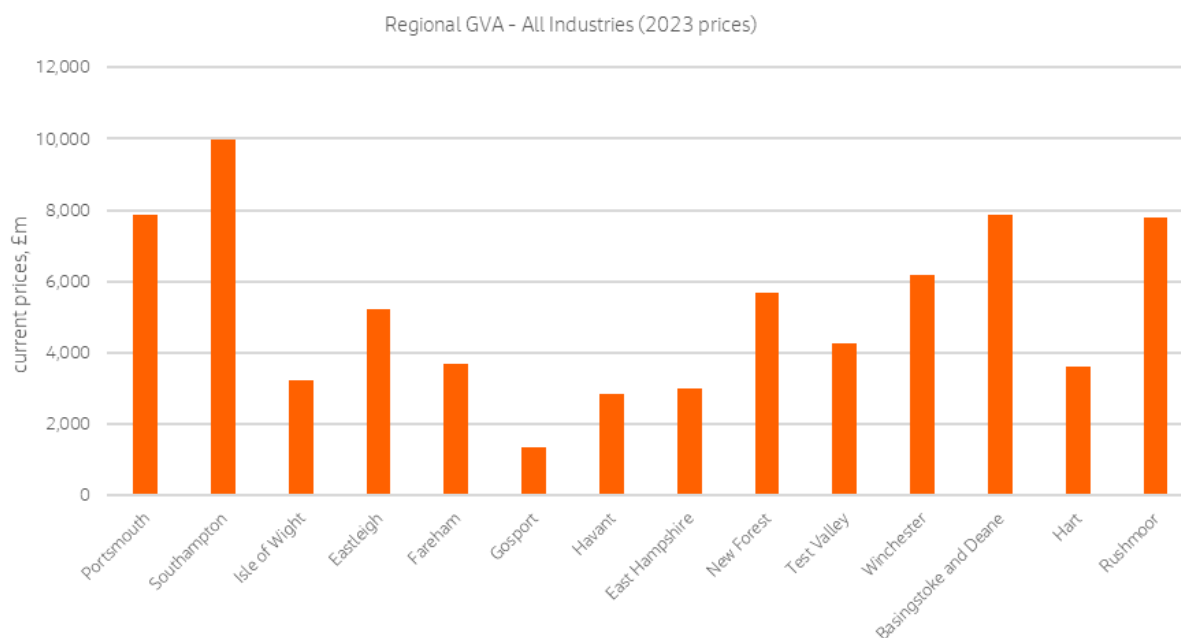


Figure 2-3: Regional GVA - All Industries (2023 prices)



Figure 2-4: GVA per hour worked (2023 prices). Source: ONS Regional GVA (balanced by industry): South East Region, 2025

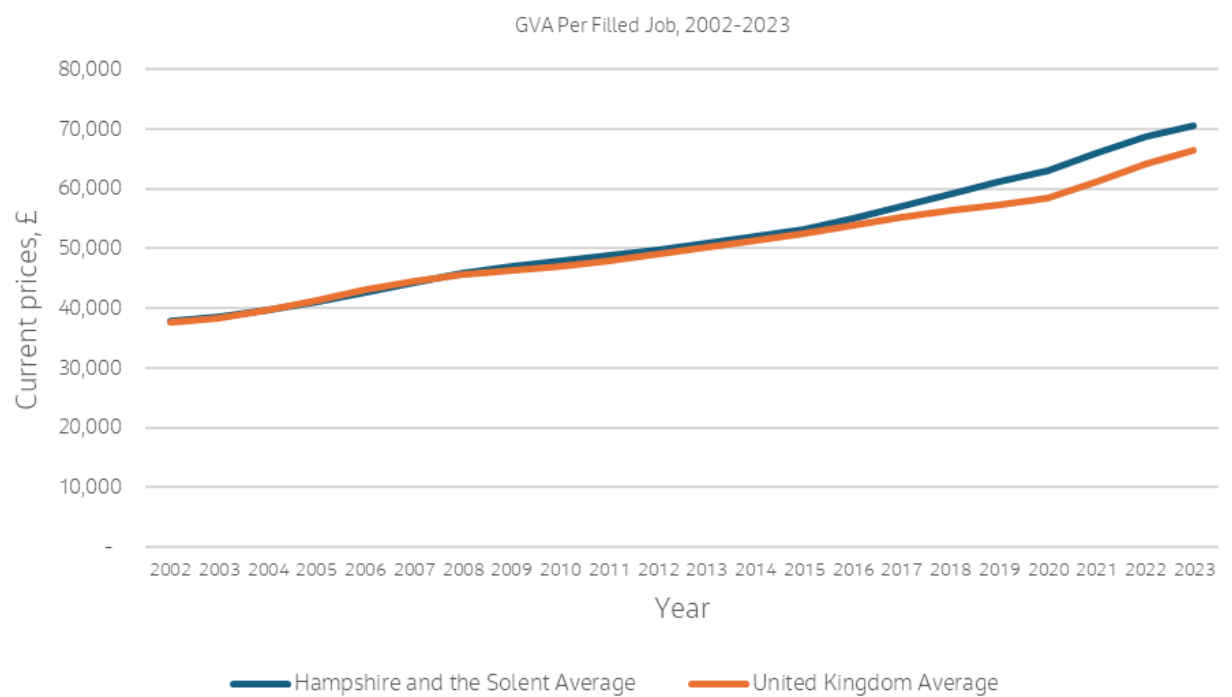


Figure 2-5: GVA per filled job, 2002-2023. Source: ONS Subregional Productivity, June 2025

2.2.4 Sectoral Profile

At the highest level, broad economic sectors can be classified using the typology outlined in Table 2-1².

Table 2-1: Broad Economic sectors

Classification	Broad Economic Sectors	Relevant sub-sectors in Hampshire and the Solent Context
Production and Construction	Manufacturing Construction Agriculture	Aerospace, Space and Defence Construction Farming and Rural Marine and Maritime
Producer Services	Finance and insurance services ICT R&D Other business activities	Professional Business Services Digital & Technologies Creative Industries Life Sciences
Consumer Services	Retail Transport and Distribution	Logistics Visitor Economy Marine and Maritime
Public Sector and Related	Public administration	Education Health and Care

Hampshire and the Solent's economy is underpinned by a range of sectors. Building on the broad classification in Table 2-1, Table 2-2 provides an overview of the typologies and the sector components, focusing on sub-sectors that are most relevant in a Hampshire and the Solent context³. Note that, recognising their broad nature, some sectors straddle different typologies. For example, the marine and maritime sector could feasibly sit under 'key specialist sectors' or 'foundational sectors', whilst digital and technology could sit under 'potential growth and opportunity sectors' or 'key specialist sectors'. For ease, such sectors have been allocated to the sector typology based on strongest alignment to the sector typology definition.

² This is broadly based on the sector classification adopted by DfT and other governmental departments.

³ Note that sectors can be defined and aggregated in multiple ways. For example, advanced manufacturing, to which 'aerospace, space and defence' is a major contributor, represents a key strength of the Hampshire and the Solent economy. Reflecting the major contribution of this sub-sector, and the relative concentration of this sector in Hampshire and the Solent on a national level, the analysis within this report focuses on the sub-sector only, rather than advanced manufacturing as a whole. This also acts to avoid or minimise double counting of business and employment data across multiple sectors/sub-sectors that include the same components. Equally, emerging sectors that are important to the future of the regional economy (e.g. clean energy) are not explicitly included in the typology presented. This is due to the lack of sub-sector definition relating to such sectors, which minimises the extent of meaningful detailed analysis on business and employment that can be achieved.

Table 2-2: Key Sectors and Components

Sector Typology	Sector Typology Definition	Sector Components
Key Specialist Sectors	Where key clusters of national and international significance exist.	Aerospace, Space and Defence Marine and Maritime
Potential Growth and Opportunity Sectors	Where Hampshire and the Solent support emerging clusters that have the potential to drive economic growth and development.	Creative Industries Digital & Technologies Life Sciences
Strategic Sectors	Complement and leverage the Key Specialist Sectors and Potential Growth and Opportunity Sectors and drive additional economic growth.	Visitor Economy Professional Business Services Logistics
Foundational Sectors	Provide underlying critical services/activities needed to support sustainable growth.	Education Health and Care Construction Farming and Rural

The eight sectors (highlighted in blue in both tables) falling within the Key Specialist Sectors, Potential Growth and Opportunity Sectors and Strategic Sectors typology form the focus of this study.

Opportunities pertaining to these key sectors are summarised below (see Appendix A for further information):

- Presence of major anchor firms, supply chains and industry bodies e.g. BAE Systems, Airbus, Boeing in support of the aerospace, space and defence sector; IBM, Sony, Garmin in the digital and technologies sector; Maritime UK Solent's innovation hub in the marine and maritime sector; Farnborough Aerospace Consortium and South Central Regional Defence and Security cluster in the aerospace, space and defence sector.
- World class research institutions, including the Centre of Excellence for Satellite Applications located within the University of Portsmouth, Defence Science and Technology Laboratory (Dstl) in Fareham and Gosport and the ADS Group in Farnborough (all relevant to the aerospace, space and defence sector); Centre for Cancer Immunology (the UK's first centre dedicated to cancer immunology research), the Centre for Healthcare Modelling and Informatics, Southampton Science Park and the National Biofilms Innovation Centre (all relevant to the life sciences sector).
- Special designation or status from a regulatory perspective (e.g. Freeport status supporting the marine and maritime sector).

Key constraints (see Appendix A for further information):

- Shortage of suitable property: linked to bespoke, niche requirements in some sectors (e.g. aerospace, space and defence) as well as competition between sectors (e.g. e-commerce/logistics versus marine and maritime) and poor quality of existing stock (particularly office accommodation for the life sciences and professional service sector).
- Transport and connectivity infrastructure: key transport assets and networks are considered to be operating at capacity, with significant congestion at peak times.
- Skills shortages: there are high numbers of vacancies in some high value sectors (e.g. digital and technology).
- Digital connectivity: particularly in North Hampshire and rural areas, where there is superfast speed gap with competing, neighbouring areas (e.g. Thames Valley Berkshire).

2.2.5 Sectoral Employment Profiles

The key sectors are not equally distributed across Hampshire and the Solent. In absolute terms⁴, Southampton has the largest share of 'key sector' workers in the region, predominantly across Professional Business Services and Visitor Economy sectors. Gosport, Havant and Hart have lowest shares of total employment across the key sectors. In relative terms⁵, Rushmoor has the highest concentration of employment across the eight key sectors. Havant, New Forest and Isle of Wight have lowest relative concentration of employment across the key sectors (<40%). The remaining local authorities all support concentrations in the range of 40-50%.

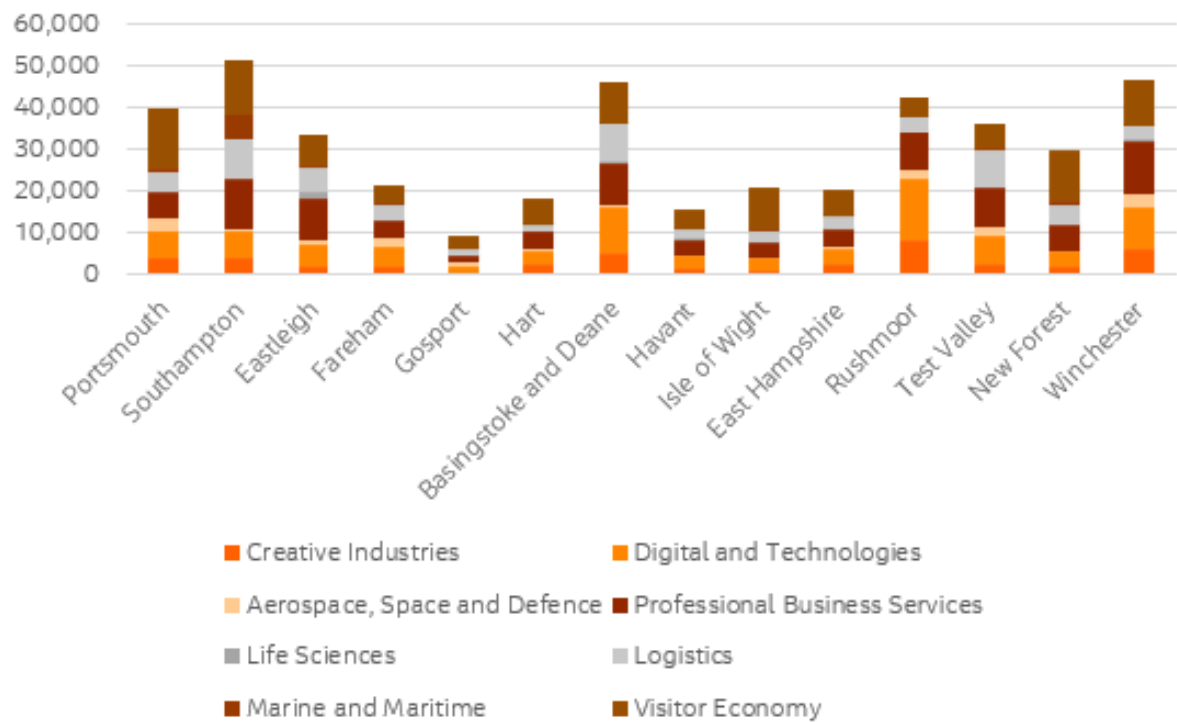


Figure 2-6: Absolute Employment Concentrations Across Key Sectors (thousands). Source: ONS Business Register and Employment Survey, 2024

⁴ Absolute employment concentrations refers to the total number of workers in each local authority employed in the 8 key sectors
⁵ Relative employment concentrations refers to the proportion of workers in each local authority employed in the 8 key sectors.

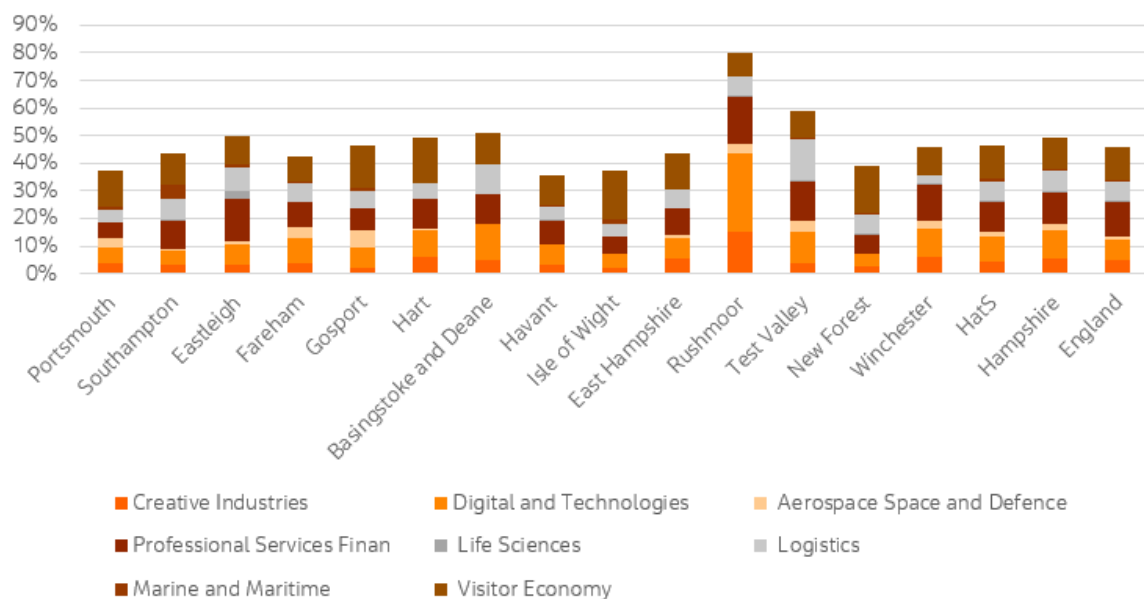


Figure 2-7: Relative Employment Concentrations across 8 key sectors (%). Source: ONS Business Register and Employment Survey, 2024.

2.2.5.1 Employment Sector Concentrations

Employment-based sector concentrations are informed by consideration of location quotients⁶, absolute scale of employment and growth rates for the key sectors (from 2015-2024). This analysis demonstrates the following insights:

- **Aerospace, Space and Defence:** absolute and relative concentrations in Gosport, Winchester, Test Valley, Portsmouth, Rushmoor and Fareham.
- **Marine and Maritime:** absolute and relative concentrations in Southampton. Rapid growth and relative concentration in Gosport, Portsmouth and Isle of Wight.
- **Professional Business Services:** absolute and relative concentrations in Rushmoor. Absolute concentrations in Eastleigh, Southampton, Basingstoke and Deane and Winchester.
- **Logistics:** absolute and relative concentrations in Test Valley and Basingstoke and Deane. Rapid growth in Rushmoor.
- **Life Sciences:** absolute and relative concentrations in Eastleigh. Rapid growth and relative concentration in Rushmoor and Southampton.
- **Digital and Technologies:** absolute and relative concentrations, as well as rapid growth in Rushmoor. Absolute and relative concentration in Basingstoke and Deane.
- **Creative Industries:** absolute and relative concentrations, as well as rapid growth in Rushmoor. Absolute concentrations in Portsmouth, Southampton and Winchester.
- **Visitor Economy:** absolute and relative concentrations in Isle of Wight and New Forest. Absolute concentrations in Portsmouth and Southampton.

⁶ Employment-based location quotients measure the relative concentration of employees within a sector at the local authority level compared to at the national level. A location quotient greater than 1.0 reflects a higher concentration of employees within a sector locally relative to the national average. A location quotient less than 1.0 reflects the reverse.

From a strictly location quotient perspective, Table 2-3 highlights the relative sectoral strengths of local authorities within Hampshire and the Solent. Further information on employment sector concentrations is illustrated by the graphs in Appendix B.

Table 2-3: Location quotients by sector (employment)

Geography	Creative Industries	Digital and Technologies	Aerospace Space and Defence	Professional Business Services	Life Sciences	Logistics	Marine and Maritime	Visitor Economy
Hampshire and the Solent	1.09	1.45	2.13	0.96	1.54	1.17	3.19	1.19
Hampshire	1.21	1.66	2.23	1.04	1.86	1.22	1.12	1.11
Portsmouth	0.76	0.78	3.30	0.45	0.20	0.67	2.27	1.11
Southampton	0.61	0.71	0.52	0.82	1.13	1.11	12.49	0.94
Eastleigh	0.61	1.04	1.36	1.19	7.66	1.30	1.82	0.89
Fareham	0.81	1.23	3.99	0.71	0.12	1.00	1.68	0.75
Gosport	0.41	1.05	6.34	0.60	0.29	0.91	2.44	1.27
Hart	1.24	1.31	0.68	0.85	0.00	0.78	0.49	1.36
Basingstoke and Deane	1.05	1.74	0.46	0.81	1.50	1.48	0.48	0.96
Havant	0.62	1.02	0.06	0.68	0.89	0.70	0.44	0.93
Isle of Wight	0.36	0.74	0.14	0.50	0.10	0.64	3.04	1.51
East Hampshire	1.11	1.05	0.77	0.78	0.48	0.94	0.24	1.10
Rushmoor	3.08	3.92	3.33	1.35	1.93	0.95	0.34	0.72
Test Valley	0.75	1.58	3.69	1.16	1.07	2.11	1.18	0.82
New Forest	0.56	0.57	0.28	0.55	0.40	0.99	2.34	1.40
Winchester	1.22	1.38	3.01	1.03	1.31	0.43	0.18	0.84

2.2.6 Sectoral Business Profile

Similar to the employment profile, the business profile of key sectors across Hampshire and the Solent also demonstrates variation across the sub-region. In absolute terms⁷, Winchester has the greatest number of

⁷ Absolute business concentrations refers to the total number of businesses in each local authority within the 8 key sectors

businesses in the region⁸, across the key sectors (8,765). Gosport has the lowest business count, with 1,905 businesses, significantly lower than Rushmoor which is the next lowest (3,950). In relative terms⁹, the eight key sectors represent c. 50-60% of all businesses across the local authorities comprising Hampshire and the Solent. The Isle of Wight has a significant proportion of local businesses (20%) operating in the Visitor Economy sector. This reflects the seasonal popularity of the region with holidaymakers. Across all 14 Local Authorities there is strong representation for professional business services firms, trending closely to England's 16% average.

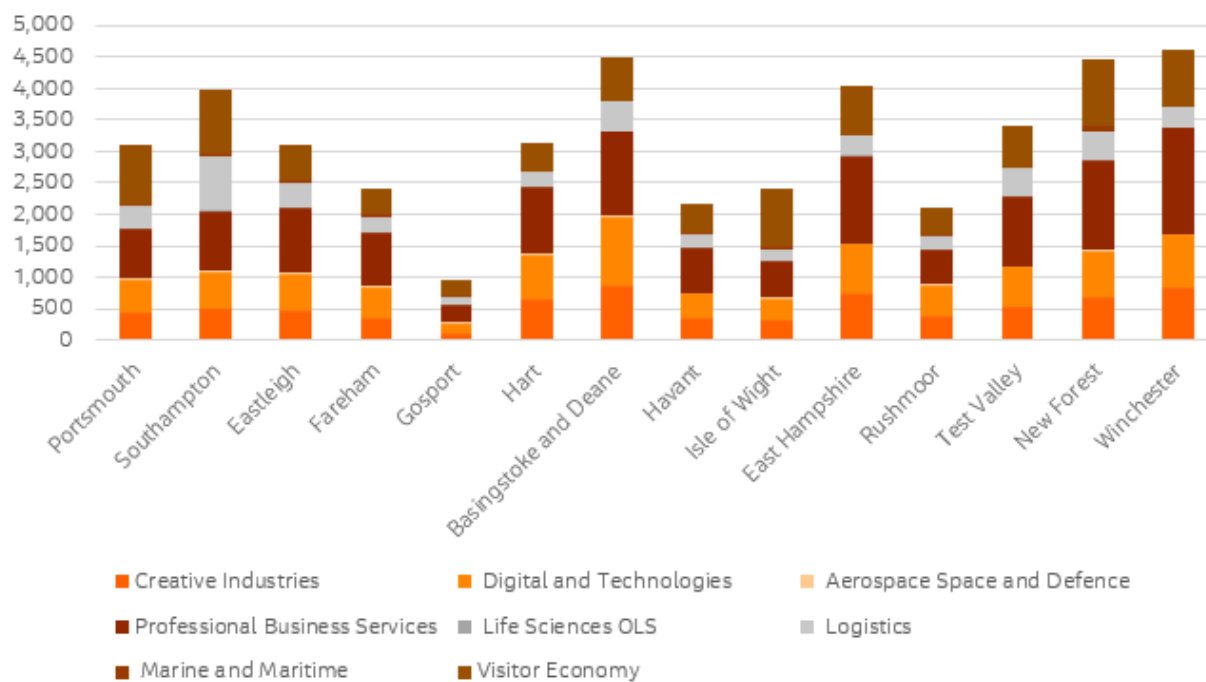


Figure 2-8: Absolute business counts across the 8 key sectors (thousands). Source: ONS UK Business Counts, 2025

⁸ Measured in terms of enterprises, from ONS UK Business Counts.

⁹ Relative employment concentrations refers to the proportion of businesses in each local authority employed in the 8 key sectors.

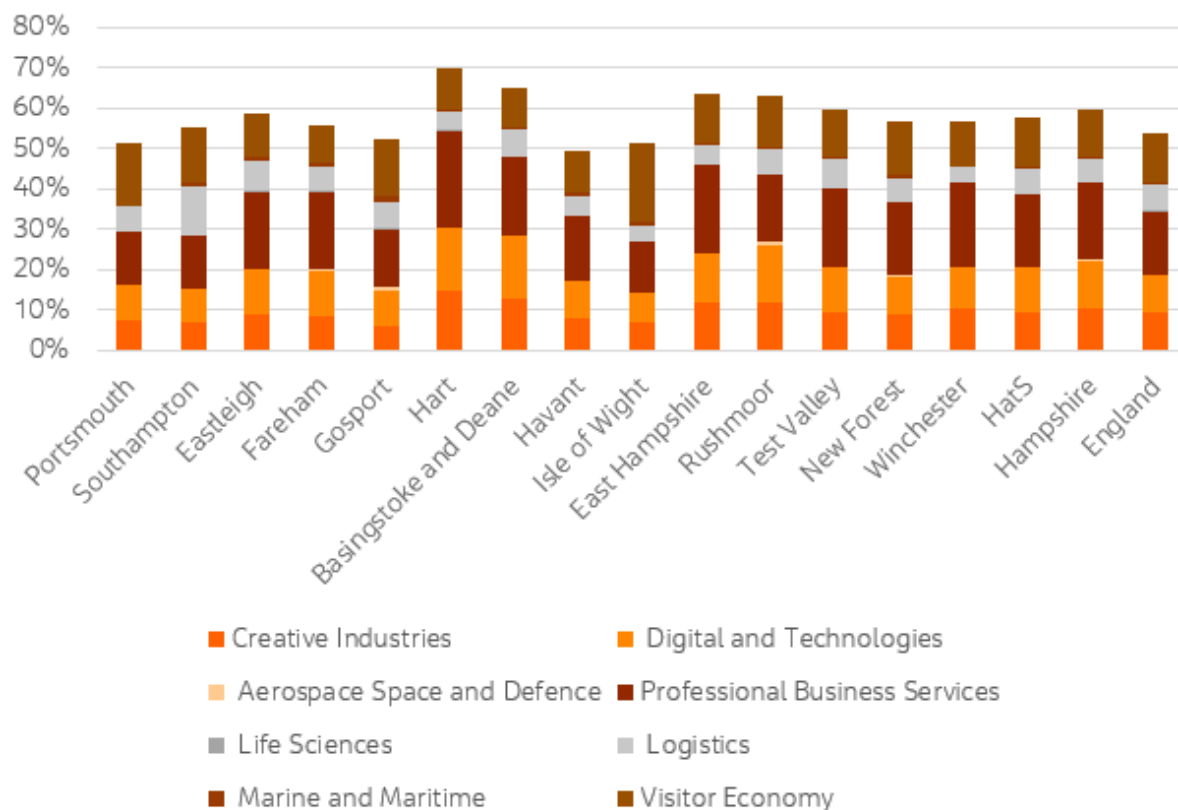


Figure 2-9: Relative business counts across the 8 key sectors (thousands). Source: ONS UK Business Counts, 2025.

2.2.6.1 Business Sector Concentrations

Business-based sector concentrations are informed by consideration of location quotients¹⁰, absolute scale of businesses and growth rates for the key sectors (from 2015-2025). This analysis demonstrates the following insights:

- **Aerospace, Space and Defence:** absolute and relative concentrations in Rushmoor. Relative concentration in Gosport. Stagnant or negative growth in number of businesses across all locations.
- **Marine and Maritime:** positive growth trends in most locations. Absolute and relative concentrations in Eastleigh, Gosport, Isle of Wight, Fareham and Southampton.
- **Professional Business Services:** absolute concentrations in Winchester, East Hampshire and Basingstoke and Deane. Relative concentration in East Hampshire and Hart. Stagnant or negative growth in most locations.
- **Logistics:** rapid growth, absolute and relative concentration in Southampton.
- **Life Sciences:** stagnant growth in all locations. Relative concentration in Gosport. Absolute concentrations in Test Valley, Southampton and Winchester.

¹⁰ Business-based location quotients measure the relative concentration of businesses within a sector at the local authority level compared to at the national level. A location quotient greater than 1.0 reflects a higher concentration of businesses within a sector locally relative to the national average. A location quotient less than 1.0 reflects the reverse.

- **Digital and Technologies:** absolute and relative concentrations in Basingstoke and Deane, Hart and Rushmoor. Absolute concentration in Winchester.
- **Creative Industries:** absolute and relative concentrations in Basingstoke and Deane and Hart. Substantial growth in Hart.
- **Visitor Economy:** absolute and relative concentrations in Isle of Wight. Absolute concentrations in New Forest, Portsmouth and Southampton.

From a strictly location quotient perspective, Table 2-4 highlights the relative sectoral strengths of local authorities within Hampshire and the Solent. Further information on employment sector concentrations is illustrated by the graphs in Appendix C.

Table 2-4: Location quotients by sector (businesses)

Geography	Creative Industries	Digital and Technologies	Aerospace Space and Defence	Professional Business Services	Life Sciences	Logistics	Marine and Maritime	Visitor Economy
Hampshire and the Solent	0.91	1.05	1.87	0.99	0.71	0.87	1.61	0.88
Hampshire	0.98	1.14	2.02	1.08	0.76	0.80	1.42	0.81
Eastleigh	0.83	1.09	2.70	1.05	0.60	1.01	3.24	0.75
Fareham	0.78	1.09	2.48	1.08	0.73	0.81	2.75	0.67
Hart	1.38	1.52	2.40	1.33	0.71	0.66	0.88	0.74
Basingstoke and Deane	1.21	1.51	1.04	1.07	0.92	0.97	0.38	0.70
Gosport	0.54	0.87	5.83	0.81	1.72	0.89	2.87	1.02
Havant	0.74	0.91	0.82	0.89	0.73	0.68	1.82	0.74
New Forest	0.84	0.90	1.38	1.01	0.41	0.80	2.37	0.96
East Hampshire	1.12	1.18	1.69	1.21	0.50	0.67	0.62	0.87
Rushmoor	1.11	1.38	7.55	0.91	0.96	0.91	0.80	0.89
Test Valley	0.89	1.08	0.63	1.07	1.11	1.03	0.69	0.83
Winchester	1.00	0.98	1.32	1.14	0.78	0.54	0.65	0.78
Southampton	0.66	0.79	1.49	0.73	0.88	1.64	2.56	0.98
Portsmouth	0.72	0.82	1.19	0.73	0.53	0.83	1.10	1.11
Isle of Wight	0.65	0.70	1.53	0.69	0.00	0.56	3.11	1.38

2.2.7 Sector Strength Summary

Table 2-5: Summary of Local Authorities and key sectoral concentrations

Local Authority	Key Sectoral Concentrations	Local Authority	Key Sectoral Concentrations
Portsmouth	Aerospace, Space and Defence Marine and Maritime	Havant	Marine and Maritime
Southampton	Marine and Maritime Logistics Aerospace, Space and Defence	East Hampshire	Aerospace, Space and Defence Professional Business Services
Eastleigh	Aerospace, Space and Defence Marine and Maritime Life Sciences Logistics	Rushmoor	Aerospace, Space and Defence Digital & technologies Creative Industries Life Sciences Professional Business Services
Fareham	Aerospace, Space and Defence Marine and Maritime Digital and Technologies	Test Valley	Logistics Digital and Technologies Aerospace, Space and Defence
Gosport	Aerospace, Space and Defence Marine and Maritime Visitor Economy Life Sciences	New Forest	Marine and Maritime Visitor Economy Aerospace, Space and Defence
Hart	Visitor Economy Digital and Technologies Creative Industries Aerospace, Space and Defence Professional Business Services	Winchester	Digital and Technologies Aerospace, Space and Defence Life Sciences Creative Industries
Basingstoke and Deane	Digital & Technologies Life Sciences Logistics Creative Industries	Isle of Wight	Aerospace, Space and Defence Marine and Maritime Visitor Economy

Blue text denotes key spatial clusters

The locations that have a relative concentration of employment and/or businesses in a given key sector (i.e. a location quotient > 1.2) are outlined in the above table. Taking into account the growth rates and absolute scale of sectors across these geographies, the key spatial clusters are highlighted in blue in the above table. These clusters benefit from:

- Strong location quotients (i.e. relative concentration of employees and/or businesses).
- Large volume of activity (i.e. absolute concentration of employees and/or businesses).
- Demonstrable growth trends since 2015.

The analysis highlights the following patterns:

- Strong marine and maritime clustering throughout the Solent area.

- Strong aerospace, space and defence clustering around the Portsmouth naval hub and extending through central and northern Hampshire (i.e. Winchester, Test Valley, Rushmoor).
- Strong digital and technologies clustering in central and northern Hampshire (i.e. Winchester, Test Valley, Rushmoor, Basingstoke and Deane).

2.2.8 Implications for Employment Land and Development/Planning Pipeline

Hampshire and the Solent supports a strong economy – one of the strongest nationally outside London when measured in terms of labour productivity. A range of key growth sectors – including nationally significant and strategic sectors (e.g. aerospace, space and defence, marine and maritime) – already demonstrate some evidence of clustering across Hampshire and the Solent. To support continued growth of these sectors, it is critical that the right opportunities for investment and development are provided in the right places. These opportunities need to respond to the specific needs and requirements of potential occupiers, which are often bespoke, non-standard and incompatible with the current supply/availability of commercial real estate. Within this context, the following section considers opportunities and challenges pertaining specifically to the real estate/property market context.

2.3 Real Estate/Property Market Context

2.3.1 Employment Floorspace Supply

Employment floorspace is distributed across Hampshire and the Solent, but with specific concentrations in Test Valley, Basingstoke and Deane, Portsmouth and Southampton.

Industrial floorspace is the most common form of employment floorspace supply. Test Valley, Basingstoke and Deane, Eastleigh, Southampton and Portsmouth have the largest volume of industrial supply currently. For the Solent-based authorities, this reflects the scale of marine and maritime activity in these locations. Test Valley and Basingstoke and Deane support substantial logistics sectors too. Current supply of industrial floorspace includes numerous major business and technology parks, including Farnborough Business Park, Cody Technology Park, Chineham, Basing View, Langstone Technology Park, Solent Business Park, and Chilworth Science Park.

Basingstoke and Deane, Southampton, Rushmoor and Winchester have the largest volume of office supply currently, reflecting the distribution of professional business services jobs across the sub-region. These trends are outlined in the following graphs.

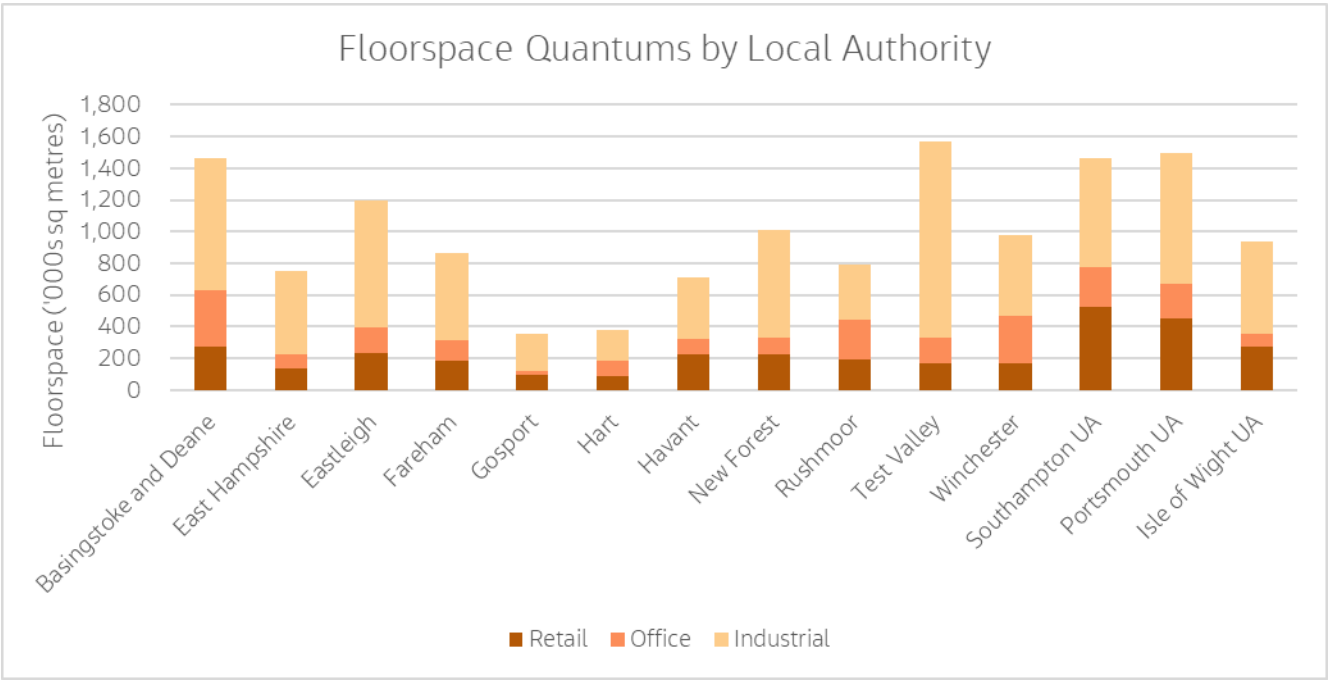


Figure 2-10: Commercial Floorspace by Local Authority. Source: VOA Non-domestic Rating: Business Floorspace, 2023

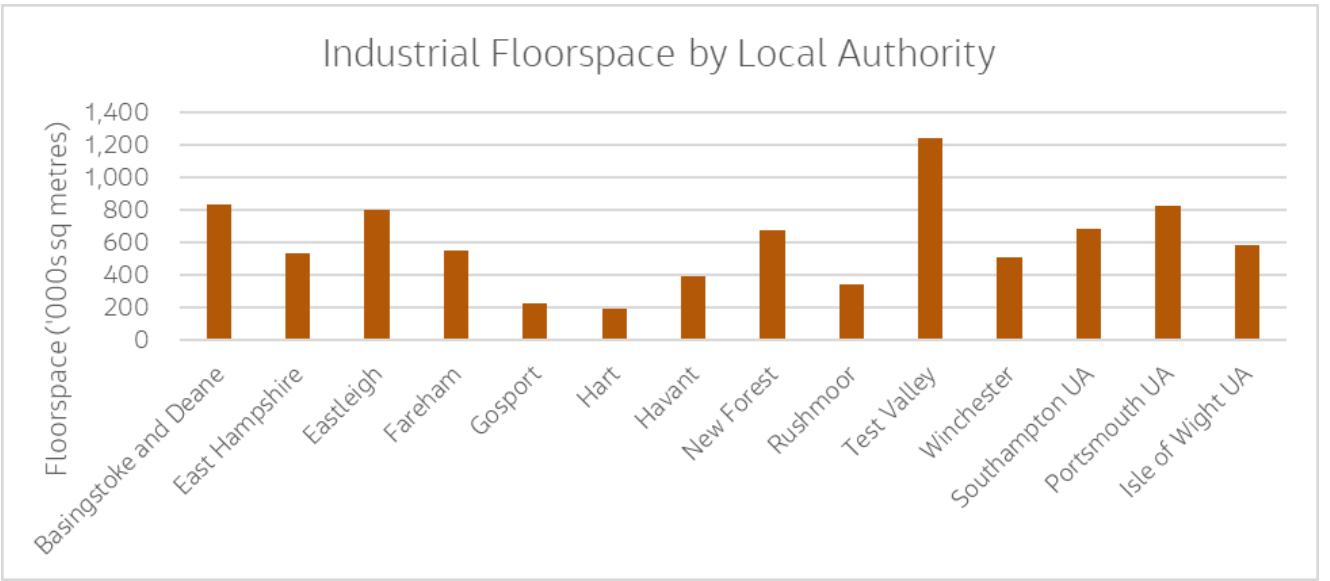


Figure 2-11: Industrial Floorspace by Local Authority. Source: VOA Non-domestic Rating: Business Floorspace, 2023

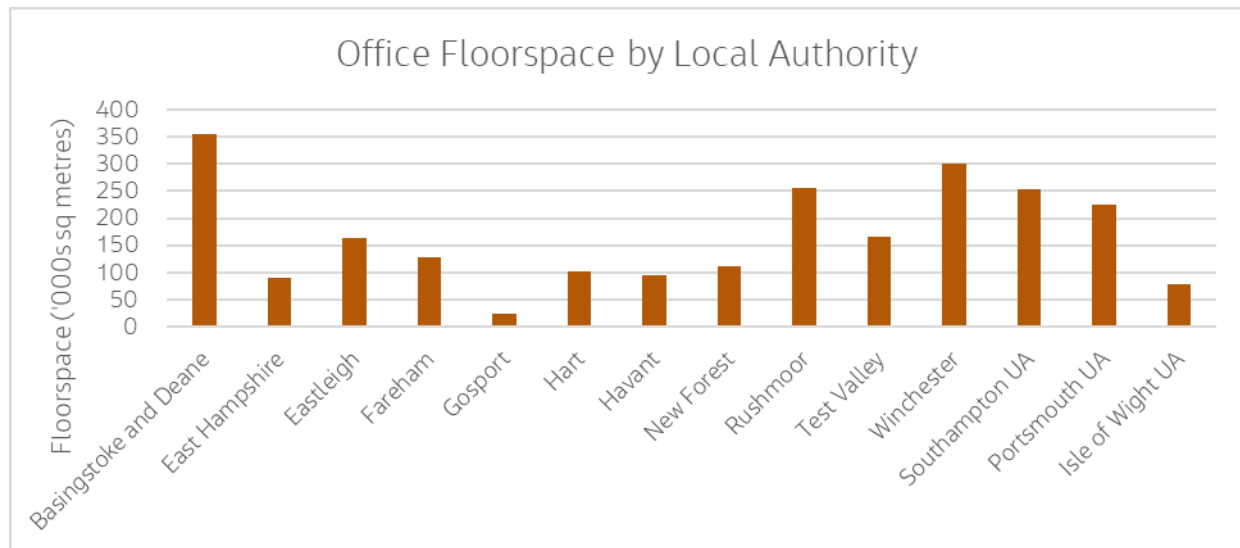


Figure 2-12: Office Floorspace by Local Authority. Source: VOA Non-domestic Rating: Business Floorspace, 2023

Trends demonstrate that overall, the supply of employment floorspace has increased marginally since 2021. This reflects an overall marked reduction in office supply and an overall slight increase in industrial and retail supply. The marked reduction in office supply is attributed to conversion of poorer quality stock to residential uses. The reduction is most noticeable in Southampton and Basingstoke and Deane (two of the sub-regions' biggest office markets). The slight increase in industrial supply is most noticeable in two of the sub-region's smaller markets (Winchester and Hart). A reduction in industrial supply is discernible in some of the traditionally bigger industrial markets (Southampton and Portsmouth). These trends are outlined in the following graphs.

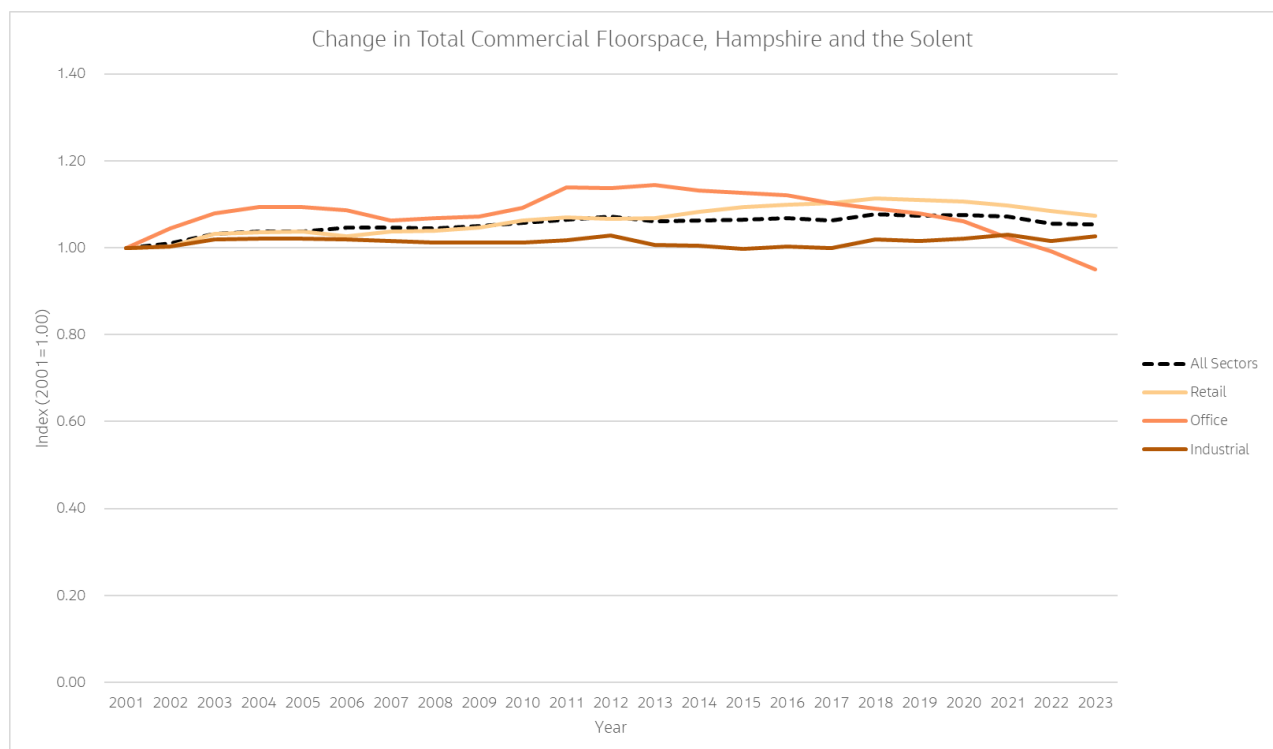


Figure 2-13: Change in Total Commercial Floorspace, Hampshire and the Solent. Source: VOA Non-domestic Rating: Business Floorspace, 2023

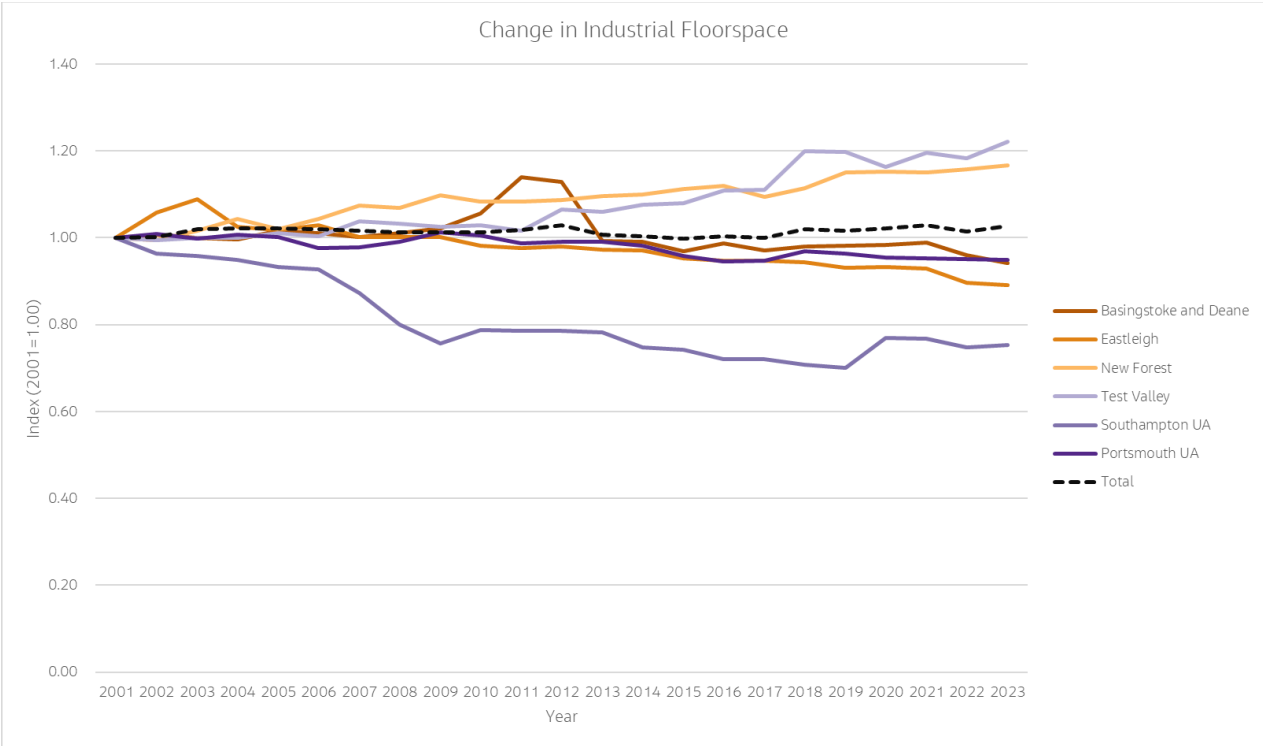


Figure 2-14: Change in Industrial Floorspace. Source: VOA Non-domestic Rating: Business Floorspace, 2023¹¹

¹¹ To maximise clarity, only data for the Local Authorities with the greatest volume of industrial space (i.e. > 600,000 sqm) are included in this figure.

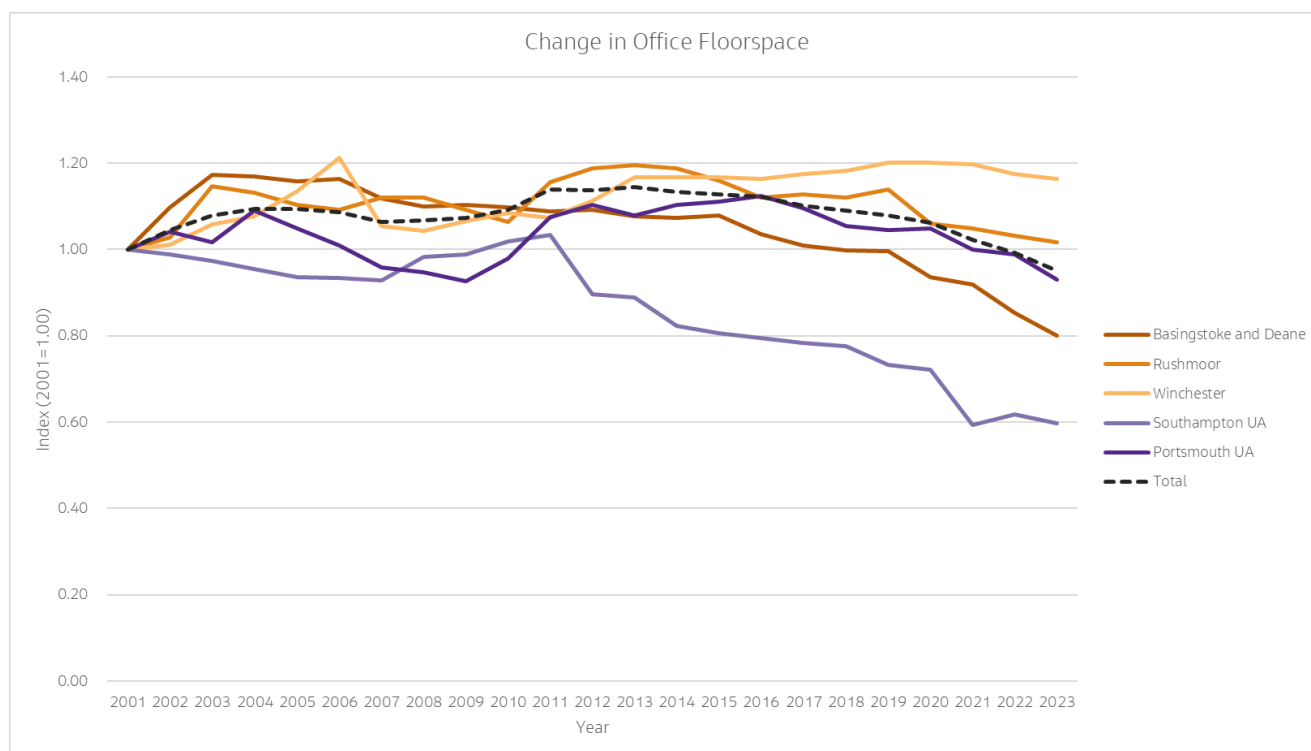


Figure 2-15: Change in Office Floorspace. Source: VOA Non-domestic Rating: Business Floorspace, 2023¹²

2.3.2 Approximated Rental Values

Using the Valuation Office Agency (VOA)'s Rateable Value data as a proxy for market rents, the office market across Hampshire and the Solent is depressed, achieving rents 40% lower than the national average. Further, prevailing rents are up to 90% lower than competitor locations in the South East (e.g. Reading, Windsor and Maidenhead). Even the best performing office locations (e.g. Eastleigh, Rushmoor, Hart, Southampton, Winchester) are around one-third lower than the national average. These office market trends are set against a reduction in supply across the sub-region which constrains availability and are indicative of the overall poor quality of office stock across much of the sub-region. In contrast, industrial rents are 40% higher than the national average. This pattern is consistent across all individual local authorities (with the exception of Isle of Wight). Industrial rents are particularly strong in locations closer to Thames Valley and the London conurbation (e.g. Hart, Rushmoor). These trends are outlined in the following graphs.

¹² To maximise clarity, only data for the Local Authorities with the greatest volume of office space (i.e. > 200,000 sq m) are included in this figure.



Figure 2-16: Rateable Values, Office (top) and Industrial (bottom). Source: VOA Rateable Value Data

Trends for office market rents suggest downward pressure and a reduction in rents over time in some of the sub-region’s key office markets (e.g. Rushmoor). This contributes to marginal overall growth in office rents between 2001 and 2023. Southampton acts as an outlier in the context of the sub-region as a whole. Trends for industrial market rents show substantial growth since 2021. Growth across Hampshire and the Solent has been stronger than the national benchmark in this time. These trends are outlined in the following graphs.

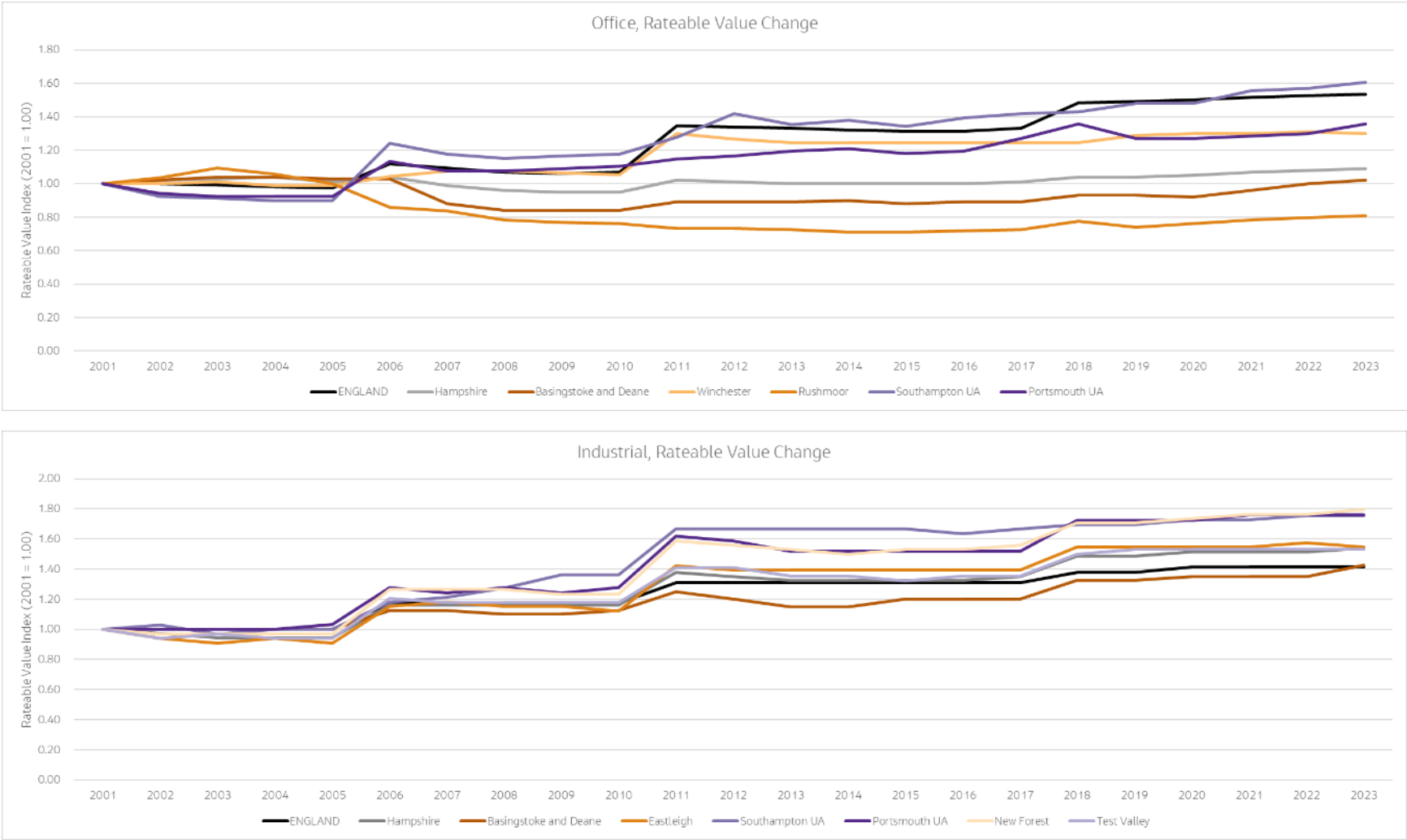


Figure 2-17: Rateable Value Change, Office (top) and Industrial (bottom). Source: VOA Rateable Value Data¹³

¹³ To maximise clarity, only data for the Local Authorities with the greatest volume of office space (i.e. > 200,000 sq m) and industrial space (i.e. > 600,000 sqm) are included in this figure.

2.3.3 Real Estate Dynamics by Location

Reflecting the spatial distribution of key sectors and clusters, each local authority within the sub-region has specific real estate market dynamics and trends, as detailed in Appendix D. This is informed by real estate market reports, alongside the sources listed. The key findings from a real estate market dynamics perspective include:

- Office:
 - There is a large supply of lower grade and dated stock (e.g. Havant, Rushmoor, Hart).
 - There is substantial poor quality vacant stock that requires refurbishment investment to bring back into use (e.g. Basingstoke and Deane, East Hampshire).
 - Speculative development is limited, despite demand for high quality accommodation (e.g. Southampton, Test Valley).
 - Substantial pressure from conversion of office space to residential (e.g. Southampton, Winchester, Eastleigh, Portsmouth).
- Industrial:
 - High occupancy rates (e.g. Portsmouth, Isle of Wight, Havant).
 - Constrained supply (e.g. Rushmoor, Hart).
 - Demand for accommodation at various scales, including smaller units to support last mile delivery (e.g. Fareham, East Hampshire) as well as big box logistics supporting the marine and maritime/logistics sectors (e.g. New Forest, Test Valley, Basingstoke and Deane).

2.3.4 Employment Floorspace Demand by Sector

Across the sub-region's key sectors, real estate demand is characterised by a requirement for high quality accommodation in well-connected settings that meet the bespoke and sometimes niche requirements of potential occupiers. This demand is not always met across Hampshire and the Solent, resulting in a 'flight to quality' and the relocation of some firms to competing regions.

Table 2-6: Employment Floorspace demand by sector

Sector	Property Requirements	Spatial Location in Hampshire and the Solent
Aerospace, Space & Defence	At a broad level, firms in this sector typically require the following types of property: • Production facilities (high spec industrial) • Logistics/warehousing • Military infrastructure (barracks and training grounds) • Office and R&D facilities (including high tech campuses for defence contractors, MoD) However, firms typically require high spec or specialized facilities including: • Large, high-load-bearing spaces like hangars • High-tech R&D labs • Secure office environments • Advanced internet • Bespoke industrial/warehousing stock	• Portsmouth (Portsdown Tech Park) • Portsmouth (University of Portsmouth) • Farnborough • Fareham • Eastleigh (Southampton Airport/Navigator Quarter) • Rushmoor (Farnborough Aerospace Park) • Gosport (Daedalus) • Winchester

Sector	Property Requirements	Spatial Location in Hampshire and the Solent
	Bespoke requirements unique to these sectors also include: • Blast-proof reinforced structures for equipment storage • High ceilings • 24/7 manned security • CCTV • Biometric access controls • Secure IT networks	
Creative Industries	At a broad level, firms in this sector typically require the following types of property: • Workshops • Collaborative Spaces • Flexible Spaces • Start-up/incubator spaces	• Aldershot • Basingstoke and Deane • Hart
Digital & Technologies	• Flexible offices • Workshops • Adaptable R&D/lab spaces • Data centres	• Rushmoor (Farnborough Cody Technology Park) • Portsmouth • Southampton • Hart • Basingstoke and Deane
Life Sciences	• R&D facilities • Flexible offices • Adaptable lab spaces • Decentralised/ distributed workplaces	• Southampton (University of Southampton Science Park) • Basingstoke
Logistics	• Logistics Parks/Warehousing • Industrial	• Southampton • Test Valley
Marine/maritime	• Marinas/Hospitality	• Portsmouth (Portsdown Tech Park, Tipner West) • Gosport (Daedalus) • New Forest (Solent Gateway) • Southampton (Southampton Port, Southampton Water) • Fareham • Isle of Wight
Professional Business Services	• Offices to support entry level, growing and established firms. • Flexible/adaptable spaces.	• Southampton (Mayflower Quarter) • Portsmouth (Lakeside)
Visitor Economy	• Hotels • Facilities to grow MICE segment.	• Isle of Wight

2.3.5 Wider Evidence and Analysis on Real Estate Trends

Based on the data provided above and complementary research undertaken by real estate firms operating in the sub-region, the employment real estate market across Hampshire and the Solent is characterised by the following key trends:

- Presence of poor-quality stock of existing premises, which fails to meet the quality standards necessary to meet corporate occupier requirements. In some locations, Grade A accommodation represents less than 5% of the total office stock (e.g. Basingstoke and Deane), demonstrating an acute shortage of prime space.
- This has led to a mismatch between supply and demand in terms of quality, resulting in a 'flight to quality', with Thames Valley and Surrey being some of the biggest beneficiaries of firms relocating from the sub-region or choosing to invest in other locations. For example, Grade A office space stands at 59% of total office stock provision across the Thames Valley, compared with just 32% in Southampton.
- Some locations are delivering high quality space, but typically in small unit sizes. Supply of new accommodation is generally slow, being limited by substantial viability challenges. For example, the juxtaposition of rampant build cost inflation and stagnation of rental growth (for the office market at least), means that viability can only be achieved if average rents were more than 50% higher than prevailing rental rates. This acts to limit speculative development.
- Occupiers are also increasingly demanding flexibility and adaptability in accommodation, as well as units that are high specification and meet corporate ESG targets. When properties of this nature do become available occupiers are competing aggressively for such stock. The strong emphasis on quality means that performance is bifurcating, with prime assets doing well and secondary assets facing greater challenges (e.g. in Basingstoke and Deane, vacancy rates are as little as 1.4% in prime stock, but 19% for secondary stock).
- Simultaneously, large swathes of historic stock do not meet these requirements and the refurbishment costs required to bring existing properties up to standard are not viable for developers.
- This reality, combined with substantial pressure for conversion of office stock to residential via Permitted Development Rights, helps to explain the overall marked reduction in office supply referenced previously.

2.3.6 Key Findings on Real Estate

Key challenges for the region revolve around improving quality and viability:

- Poor Quality of Existing Stock of Commercial Real Estate
 - Large swathes of historic stock do not meet the quality standards necessary to meet corporate occupier requirements.
 - The refurbishment costs to bring ageing stock up to standard are often not financially viable.
- Viability Challenges in Delivering New Development
 - Rents would need to be 50% higher than prevailing rates to support speculative development.

This has resulted in an acute undersupply of appropriate accommodation across Hampshire and the Solent, which has driven a '**flight to quality**', with firms relocating away or choosing to invest in other locations.



2.3.7 Implications for Employment Land and Development/Planning Pipeline

A drive towards 'quality' of accommodation is critical in terms of future supply of employment space. The nature of businesses within Hampshire and the Solent's key sectors results in specific, often nuanced, requirements from real estate assets. These requirements are not always met. The majority of available real estate is poor quality and reaching end-of-life. This is not attractive to most tenants. As a result, there is a pressing need for new, high-quality development. However, speculative development of new, high-quality units is limited by viability challenges. This implies that employment space supply is constrained by viability issues. The extent to which the planning context also acts as a barrier or constraint is considered in the next section.

2.4 Planning Context

2.4.1 Aggregate Supply and Demand of Development Land

Overall, existing and emerging Local Plans supply sufficient allocations of development land to meet forecast demand across the Hampshire and the Solent sub-region. In some locations however, there is a requirement for additional allocations to be made (e.g. Basingstoke and Deane, see below).

- **Southern Hampshire:** "there is currently sufficient land allocated within South Hampshire to meet the need for employment development and there is no need to address this issue at the subregional level" (PfSH Statement of Common Ground, 2023)
- **Northern Hampshire:**
 - Test Valley: "we have sufficient supply to meet our employment land requirements in Northern Test Valley" (Test Valley Employment Needs Further Analysis Study, 2023).
 - Basingstoke and Deane: "New sites will be required to meet the need for industrial floorspace" (Basingstoke and Deane Local Plan Update 2021 to 2040, 2024).

- Rushmoor/Hart: "This level of requirement can be met from the existing supply of land allocations and extant permissions, but without there being a significant surplus of employment land." (Rushmoor Local Plan 2014-2032, 2019).

Table 2-7: Comparison of office floorspace need and supply. Source PfSH Statement of Common Ground

Local Authority	Office need (sqm) (2019 – 40)	Office supply (sqm) (2022 – 40)	Balance (sqm)
East Hants (part)	1,919	0	-1,919
Eastleigh	95,805	92,662	-3,143
Fareham	38,595	45,667	7,072
Gosport	14,616	10,258	-4,358
Havant	38,477	0	-38,477
New Forest	11,236	767	-10,469
Portsmouth	74,217	113,500	39,283
Southampton	60,959	111,851	50,892
Test Valley (part)	20,176	30,961	10,785
Winchester (part)	36,468	0	-36,468
Total	392,468	405,666	13,198

Table 2-8: Comparison of industrial land need and supply. Source PfSH Statement of Common Ground

Local Authority	Industrial need (ha) (2019 – 40)	Industrial supply (ha) (2022 – 40)	Balance (ha)
East Hants (part)	1.4	1.7	0.3
Eastleigh	9.9	45.1	35.2
Fareham	25.5	50.5	25.0
Gosport	15.5	17.4	1.9
Havant	9.1	19.9	10.8
New Forest	-10.3	7.6	17.9
Portsmouth	52.6	38.2	-14.4
Southampton	-7.8	7.9	15.7
Test Valley (part)	52.6	21.8	-30.8
Winchester (part)	19.2	21.4	2.2
Total	167.7	231.5	63.8

2.4.2 Development Land Supply/Demand at the Local Authority Level

The following tables provide a summary of the latest position relating to employment land supply and demand in each constituent local authority of the sub-region.

The analysis confirms that in general terms, the provision of employment land for office and industrial/warehousing development is sufficient across Hampshire and the Solent, although there are specific locations where there is a need for further employment land supply to meet forecasted demand (e.g. Basingstoke and Deane, Test Valley).

This suggests that at the aggregate level, employment land provision is not a significant barrier to provision of appropriate employment space.

Table 2-9: Office and Industrial Land Supply vs Demand

Local Authority	Office Employment Land Supply vs. Demand	Industrial/Warehousing Employment Land Supply vs. Demand	Source
Basingstoke and Deane	40,000 sq m up to 2040 The sites promoted for economic uses within settlement boundaries or those on previously developed land wouldn't be sufficient to meet the current identified need in its entirety. Meeting this unmet need will be addressed through the Local Plan Update.	Up to 2040: 24,000 sq m of industrial land (6ha) 99,000 sq m of logistics land (28ha) The sites promoted for economic uses within settlement boundaries or those on previously developed land wouldn't be sufficient to meet the current identified need in its entirety. Meeting this unmet need will be addressed through the Local Plan Update.	Strategic Housing and Economic Land Availability Assessment (SHELAA)
Havant	Up to 2043: 36,000 sq m; but no sites being promoted due to current market climate.	Up to 2043: 140,000 sqm of industrial land 118,000 sq m of committed capacity	Havant Borough Employment Land Review
Southampton	Net gain of 61,000-78,000 sq m by 2040	16 acres at Test Lane South 25 acres at former Ford Site	Southampton City Vision Local Plan (Options Consultation 2022) Employment Land Study (2017)
Rushmoor/Hart	48-49.2ha of B-class land. "This level of requirement can be met from the existing supply of land allocations and extant permissions, but without there being a significant surplus of employment land. "		Hart, Rushmoor and Surrey Heath Joint Employment Land Review Update (Nov 2016)
Test Valley	14.9 ha (B1a/b) up to 2040 (6.9ha within Northern Test Valley and 7.9ha within Southern Test Valley)	Up to 2040: 17.0ha (B1c/B2) (10.5ha within Northern Test Valley and 6.5ha within Southern Test Valley) 39.8 ha (B8) (13.9ha within Northern Test Valley and 25.9ha within Southern Test Valley recent higher concentrations of jobs growth in manufacturing and service activities within Southern Test Valley). 14.2ha deficit in B8	Test Valley Employment Needs Further Analysis Study DLP Planning 2023
East Hampshire	The Local Plan should make provision for around 28.2 ha of land. This is broadly in line with current commitments and allocations.		East Hampshire Employment Land Review Update 2023
Winchester	3.3-12.2ha; the current identified supply suggests sufficient employment land to meet identified needs.	24.3-26.7ha the current identified supply suggests sufficient employment land to meet identified needs.	Issues and Options Consultation Document
Eastleigh	95,805 sq m needed, 92,622 sq m supplied to 2040 (marginal deficit)	9.9ha needed, 45.1ha supplied to 2040 (massive oversupply)	Issues and Options
New Forest	i. The provision of sufficient land to meet the identified need for 126,000sqm of employment floorspace. This will comprise: a. 18 hectares of employment land (for around 70,000sqm floorspace) allocated within residential-led mixed-use Strategic Site Allocations at Totton (SS1, 5ha), Fawley (SS4 - 10ha, B1/B2) and Ringwood (SS14, 3ha); b. 10 hectares of employment land (for around 40,000sqm floorspace) allocated by Saved Policies from the Local Plan Part 2 (2014); c. Around 10,000sqm of employment floorspace completions 2016-2018, and around 30,000sqm on sites with extant planning permission.		Local Plan 2016-2036 Part One
Fareham	32,509 sq m This Local Plan includes a supply of sites to ensure that a sufficient quantum and quality of employment sites can be provided to meet the requirement.	89,454 sq m This Local Plan includes a supply of sites to ensure that a sufficient quantum and quality of employment sites can be provided to meet the requirement.	Fareham Local Plan 2037
Gosport	90,000 sq m net (all employment use classes)		Gosport Borough Local Plan 2038 Consultation Draft (Regulation 18) September 2021
Portsmouth	The need figure in the city is around 42,500m2 going up to 2040. Drawing together the need and supply position for offices the current position suggests there could be a small oversupply of space in the future (supply is 58,645 sq m).	The position in terms of combined manufacturing, warehousing and research and development need (96,300m2) and supply (79,784m2) is that there is a small under-supply. Given overlap between R&D here and office, there is an overall, broadly neutral position.	Pre-Submission Portsmouth Local Plan

Local Authority	Office Employment Land Supply vs. Demand	Industrial/Warehousing Employment Land Supply vs. Demand	Source
Isle of Wight	The council proposes to allocate over 29 hectares of land for employment uses, which will support a range of private and public sector employment uses Bringing together supply and demand, there is a nominal oversupply of 6.85 ha of industrial land and a nominal undersupply of 0.36 ha of office land.		Island Planning Strategy

Overall, existing and emerging Local Plans supply sufficient allocations of development land to meet forecast demand across the sub-region. In some locations, there is a need for further employment land supply to meet forecasted demand (e.g. Basingstoke and Deane, Test Valley).

Table 2-10: Office and Industrial Local Plan Land Supply vs Demand

Local Authority	Office Employment Land Supply vs. Demand	Industrial/Warehousing Employment Land Supply vs. Demand
Basingstoke and Deane	40,000 sq m identified, partially unmet by existing land supply. To be considered through emerging local plan.	c. 125,000 sq m identified, partially unmet by existing land supply. To be considered through emerging local plan.
Havant	No sites currently being promoted due to market conditions.	
Southampton		
Rushmoor/Hart		
Test Valley		14.2ha deficit for Warehousing.
East Hampshire		
Winchester		
Eastleigh	Marginal deficit; potentially compensated by substantial oversupply of industrial land.	
New Forest		
Fareham		
Gosport		
Portsmouth		Nominal undersupply in R&D type industrial uses, but this could be compensated for by oversupply of land for office development.
Isle of Wight	Nominal undersupply of office land (0.36ha).	

■ Large Deficit
 ■ Moderate Deficit
 ■ No Deficit

2.4.3 Key Employment and Development Sites

To meet current and future demand for employment space within Hampshire and the Solent, a range of key employment and development locations are identified within Local Plans and supporting documentation. These are highlighted in Figure 2-18 (below). The most strategic sites, including those with special regeneration or development designation (e.g. enterprise zone, freeport) or with most transformational potential (e.g. major urban and brownfield regeneration schemes) are also highlighted in Figure 2-19 overleaf.

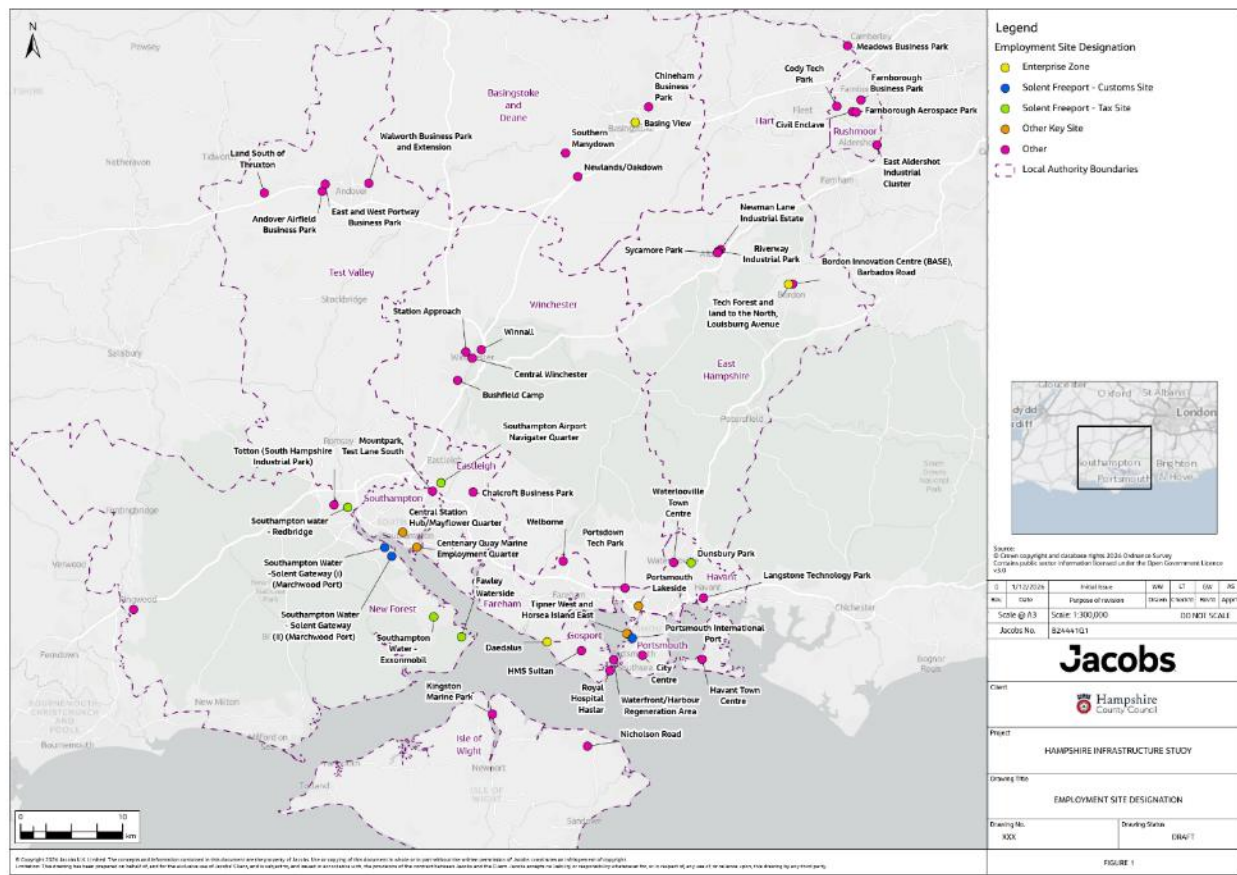


Figure 2-18: Key Employment and Development Locations in Hampshire and the Solent¹⁴

The rationale for selecting sites as strategic development sites featuring in Figure 2-19 is set out below:

- The most 'strategic sites' were selected on the basis that they:
 - Have explicit designation through existing planning and/or economic development policy (e.g. status as Enterprise Zone or Freeport); and/or,
 - Occupy major urban brownfield locations.
- A secondary consideration reviewed the alignment of these 'strategic sites' with the geographic distribution of the identified 'key specialist sectors', 'potential growth and opportunity sectors' and 'strategic sectors' within the Hampshire and the Solent context. The 'strategic sites' are all focused on supporting at least one of the sub-sectors sitting within the sectoral typology (see Table 2-2) (e.g. Aerospace, Space and Defence or Professional Business Services).
- Other considerations included:
 - Development Status: Focusing on sites that are still under development or preparing for development (e.g. at planning stage) that suffered from an infrastructure gap/deficit, rather than established sites with existing business bases (e.g. Farnborough Aerospace Park).
 - Scale: Focusing on sites that had the potential to deliver substantial volumes of employment floorspace and resulting jobs.

¹⁴ Note that 'other key sites' refers to major urban and brownfield regeneration schemes, whereas 'other' sites reflect wider important sites at the local authority level (i.e. referenced in Local Plans and supporting evidence bases)

Ultimately, the sites that met all (or most) of the above criteria were considered to represent the sites most likely to attract inward investment and occupier interest with delivery of appropriate enabling infrastructure.

This selection process directly informs the detailed review of infrastructure priorities at strategic development sites outlined in Section 5.3.

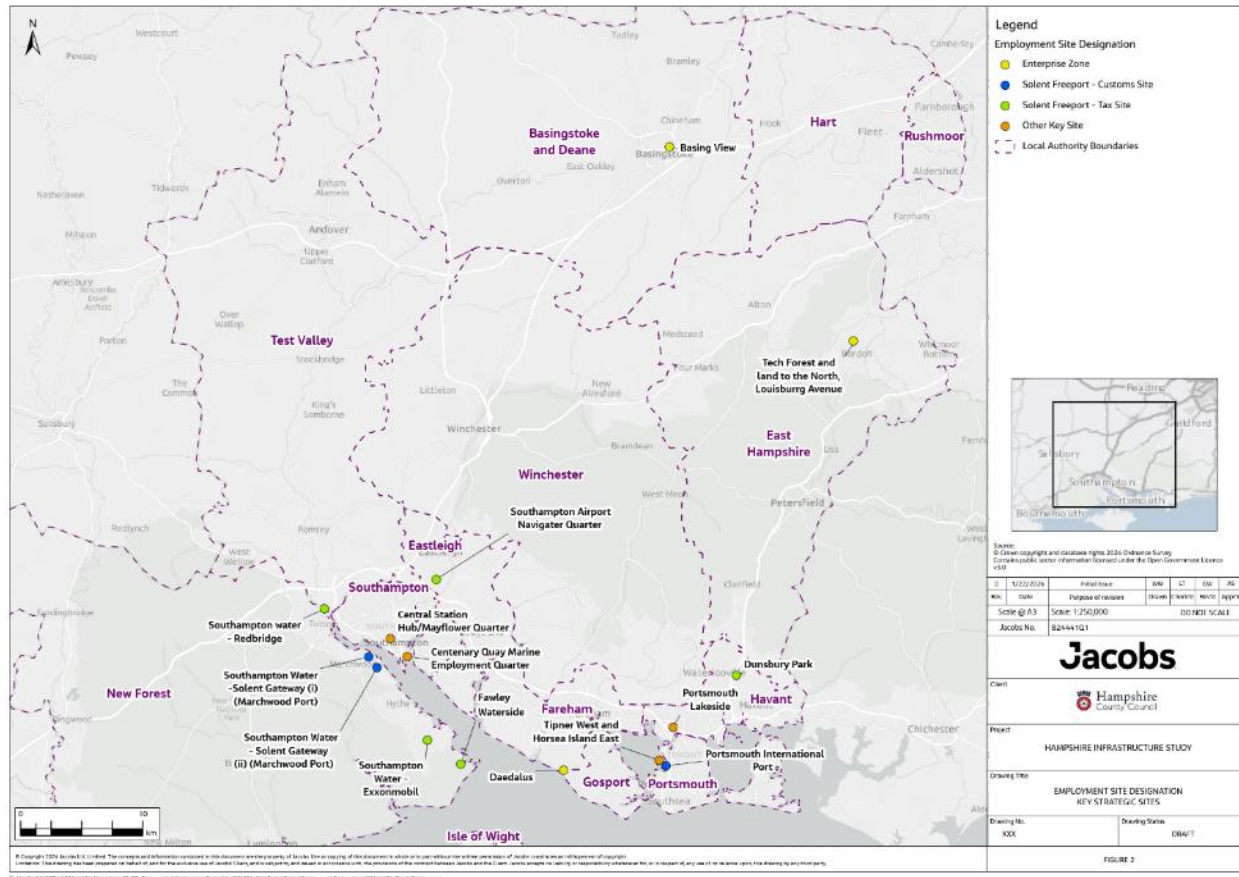


Figure 2-19: Strategic Site Locations in Hampshire and the Solent

The strategic development sites, as shown in Figure 2-19, are distributed throughout the entire region. They include strategic development sites with special designation (e.g. enterprise zone or freeport status). Whilst these are concentrated in the Solent area, examples of these strategic sites are also found in East and North Hampshire. These key employment and development locations align well with the geographic distribution of 'strategic sectors'.

Comparing the distribution of strategic sites to the sub-region's performance against the indices of multiple deprivation (Figure 2-20) demonstrates that some of strategic sites are located amidst some of the most deprived communities sub-regionally and nationally. In particular, the city centre Southampton and urban strategic sites across Portsmouth, Havant and Basingstoke and Deane are adjacent to neighbourhoods facing acute deprivation challenges. In this context, development at these strategic sites could act as a substantial force for transformational change and regeneration in some of Hampshire and the Solent's most deprived communities.

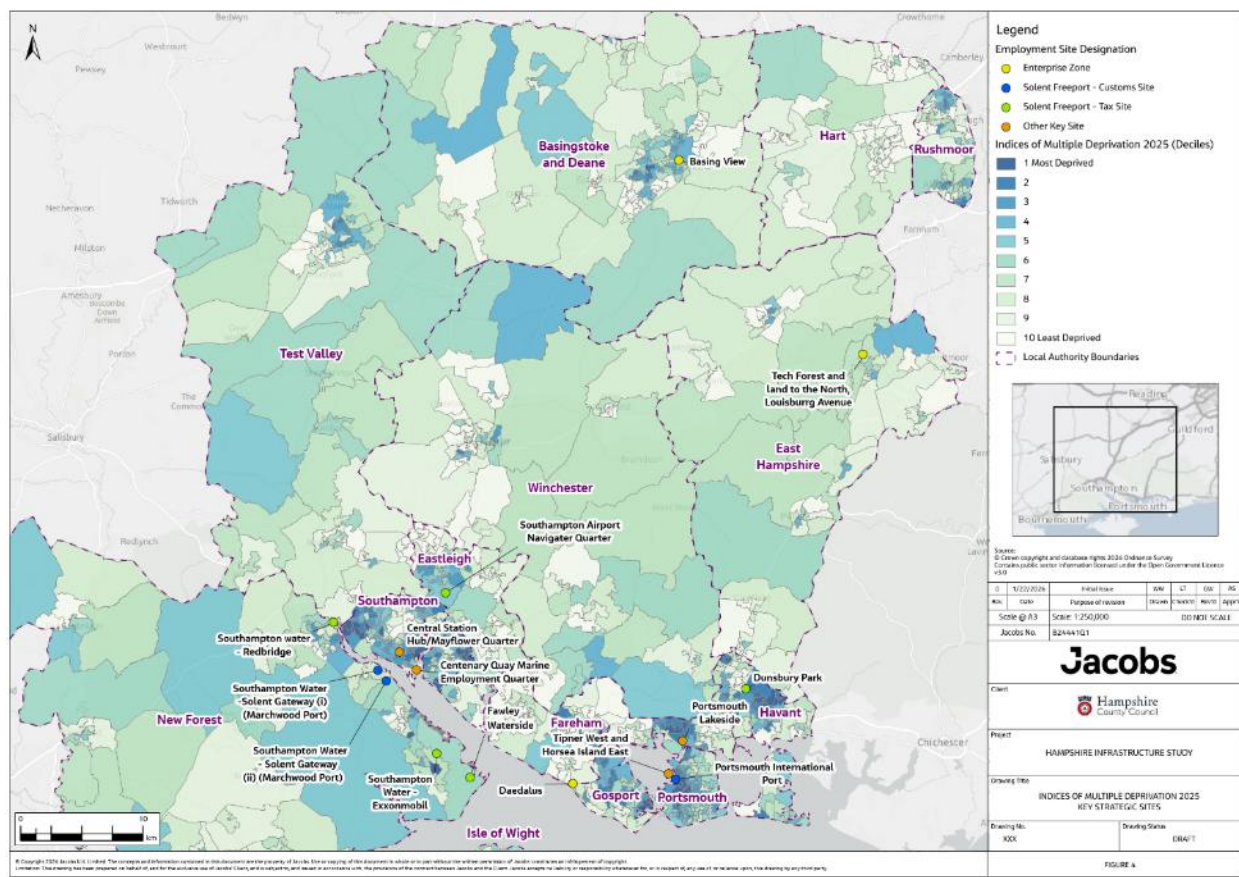


Figure 2-20: Strategic Sites against IMDs

2.4.4 Strategic Sites – Major Development Opportunities

The main characteristics, opportunities and constraints associated with each of the strategic sites is outlined in the table found in Appendix E. From a constraints perspective, the analysis demonstrates that development viability is a consistent challenge across all sites, with rental values insufficient to cover development costs. Further, the analysis identifies substantial infrastructure barriers to development for many strategic development locations, which puts further strain on viability. Recurring infrastructure constraints that affect multiple sites include:

- Choice of high quality travel options: with limited 'live locally' opportunities and poor access via public transport, walking and cycling at many sites.
- Digital connectivity challenges: gaps in provision of dedicated 5G networks at some critical locations (e.g. ports, logistics hubs, defence sites, airport sites).
- Utilities challenges: with some sites lacking basic services/connections (e.g. parts of Tech Forest) and other sites requiring major reinforcement to existing wastewater and power networks (e.g. Portsmouth lakeside, Tipner West).
- Environmental challenges: including flood risk across a number of sites, and protected environmental designations at some sites (e.g. those in Southampton Water and with proximity to New Forest National Park).
- Highways challenges: including congested local and strategic road networks with National Highways holding objections at some sites (e.g. Dunsbury Park, Southampton Airport [Navigator Quarter]).

2.4.5 Implications for Employment Land and Development/Planning Pipeline

In general terms, quantity of employment land supply is not the constraint, allocations are sufficient in most locations and at the aggregate level across the sub-region. This suggests that the real estate issues referred to previously – linked to quality, access and viability – are the primary constraints for business growth and expansion. Even the 'strategic sites' inferred from the planning policy context face some form of substantial infrastructure challenge that will impede viability and could jeopardise the delivery of quality accommodation in the right places. This situation gives rise to a series of strategic issues and resulting strategic and focused (i.e. strategic site-specific) priorities that need to be actioned to avoid inertia in employment land development and subsequent impediment to economic growth and development across Hampshire and the Solent. These issues and priorities are the focus of the next section.

2.5 Employment Land/Development Key Challenges and Priorities

2.5.1 Strategic Issues

In light of the economic, property market and planning context outlined in the above sections, the major challenges facing the sub-region from an employment land and development pipeline perspective include:

- Major viability challenges: **speculative development is not affordable** due to high build costs and cautious developers. This constrains the supply of new-build offices and industrial real estate.
- Poor quality of existing stock (particularly office accommodation): resulting in a 'flight to quality' to competing regions for some businesses who cannot expand or invest in suitable premises in the sub-region. There is a clear divide between high quality and secondary spaces. Older stock struggles to attract tenants; prospective tenants generally desire Grade A stock but there isn't enough provision, resulting in loss of potential tenants to other areas. The main constraint is therefore quality of supply rather than quantity.
- Bespoke Accommodation Requirements: many of the potential occupiers within Hampshire and the Solent's strategic sectors have very particular accommodation requirements reflecting the sensitive and innovative activities they undertake. This requires a combination of flexibility, adaptability, and bespoke specifications to meet specific needs. This acts to render large swathes of existing stock as unsuitable but adds additional viability challenges for new-build accommodation.
- Wider Infrastructure Requirements to Unlock Major Development Opportunities: substantial investment is required to overcome abnormal costs and other infrastructure costs associated with unlocking Major Development Opportunities or making them more attractive to prospective occupiers. These are difficult to deliver in light of the aforementioned viability challenges.
- Land Supply vs. Development: In aggregate terms, the supply of land for employment development is sufficient for the sub-region, but this does not translate to development and supply of appropriate accommodation for prospective firms for the above reasons. As a result, **the right type, quality and scale of accommodation does not always exist in the right places.**

2.5.2 Strategic Priorities

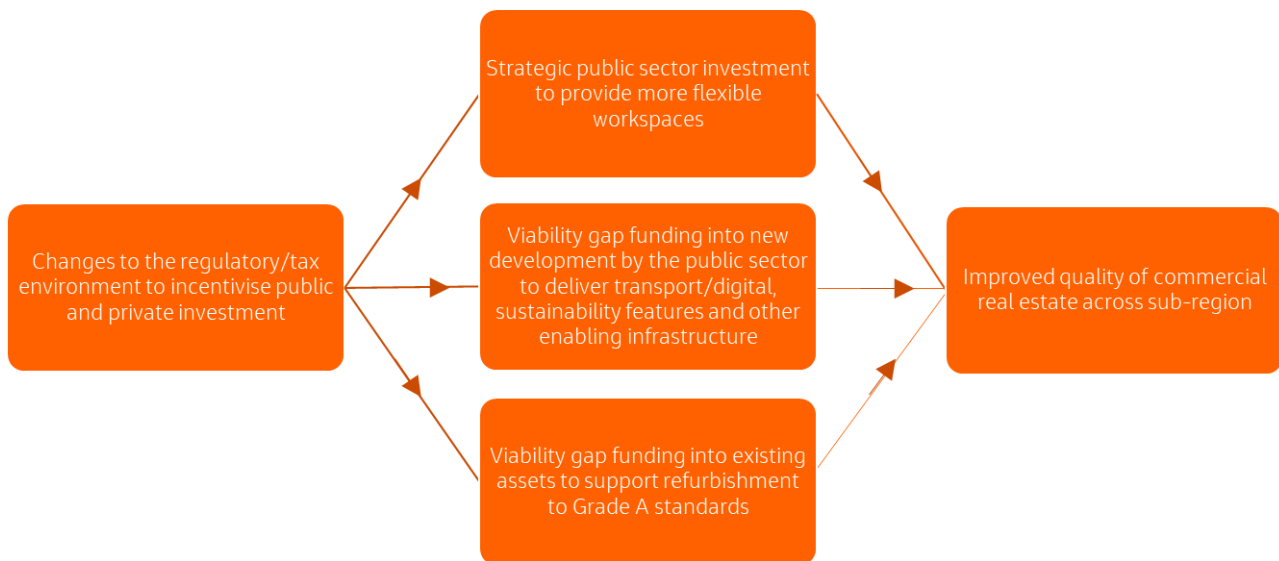
To overcome these strategic issues, the following strategic priorities are identified as critical to allowing the sub-region to realise its full economic potential:

- Respond to the 'flight to quality' through refurbishment of existing assets and provision of new high quality, sustainable, flexible office and industrial accommodation. This could be achieved by:
 - Changes to the regulatory/tax environment to incentivise public and private investment – e.g. business rate relief, business rate retention, roll-out of Solent Freeport incentives to other strategic sites, tax incremental finance. This could support:

- Strategic public sector investment to reduce viability gaps for new build/speculative development: Viability gaps cannot be resolved by increasing rents. The current break even rent required to support new build office accommodation is estimated at £50/sq ft. The achieved rents are 40% lower than this value. Within this context, viability gaps can only be resolved by using public sector funding to reduce the overall cost of development and with the aim of inducing speculative development. This could be targeted at a range of initiatives including:
 - Investment in enabling works and supporting infrastructure to reduce total development costs and incentivise private investment. This could involve direct public investment into transport, digital and other forms of infrastructure.
 - Investment in 'sustainability' features to support 'very good' and 'excellent' BREEAM certification, a key consideration in the locational choices of many potential occupiers. This could also help promote decarbonisation and reduce energy costs for occupiers.
- Strategic public sector investment to reduce viability gaps for refurbishment of existing stock:
 - Targeted investment to bridge viability gaps for the conversion of secondary stock to primary or Grade A accommodation. There is precedent in the region already (e.g. Connexus [offices] at Southampton Airport, Eastleigh).
 - Targeted investment to bridge viability gaps for the conversion of older buildings and farm properties in rural areas into smaller office/logistics units as appropriate.
- Strategic public sector investment to provide more flexible workspaces that lend themselves to (i) hybrid working / 'live locally'; (ii) start-ups/founders; (iii) conversion between workspaces/offices/R&D; (iv) co-working and serviced accommodation; (v) follow-on space for expanding SME businesses.

In summary, the strategic priorities relate to supporting additional quality employment space supply in the sub-region. However, given the existing viability challenges facing development across Hampshire and the Solent, this can only be realised through effectively targeting public sector investment support to help bridge viability gaps.

Tackling these strategic priorities will help ensure that the current adequacy of land supply is translated into supply of the right type, quality and scale of accessible accommodation in the right places. This could support potential relocation of business from competing sub-regions, as firms seek better value, as well as leveraging the sectoral strengths.



2.5.3 Focused Priorities

These strategic priorities apply across the employment land and development pipeline in Hampshire and the Solent more generally. They can translate into focused priorities at 'strategic sites' that will improve viability and/or make the sites more attractive to inward investment. As outlined in Table 5-2 of Chapter 5 (Summary and Conclusions), each site requires investment across various forms of transport, digital, environment, enabling works and utilities infrastructure (see Table 2-11 for a summary). Public sector support to deliver this enabling infrastructure could help de-risk development sites, boost viability and unlock delivery of new high quality commercial real estate.

2.6 Conclusions

Strategic Priorities:

To support delivery of high-quality employment space and remove a potential barrier to further economic growth in the sub-region, it is critical that the public sector establish the conditions for private investment into high quality employment space, either through:

- Reducing the viability gap for private investors/developers to deliver new build or refurbished business space (e.g. via infrastructure gap funding).
- Undertaking public sector-led speculative development.

This will require adoption/expansion of current financial and funding mechanisms to support public investment, including business rate retention and wider land value capture mechanisms.

Focused Priorities:

At a site-specific level, Table 2-11 displays the strategic priorities for investment that can support the attractiveness of strategic development sites (Table 5-2 provides further detail). This table has been informed by Local Plans, Employment Land Reviews, Infrastructure Delivery Plans/Infrastructure Investment Plans, Infrastructure Funding Statements, Transport Infrastructure Plans, the Solent Freeport Full Business Case and Site-specific masterplan documents.

Table 2-11: Summary of strategic sites and strategic priorities for investment

Strategic Site	Transport	Digital	Environment	Enabling Works	Utilities
Dunsbury Park	✓	✓			
Central Station Hub/Mayflower Quarter	✓	✓	✓		
Centenary Quay Marine Employment Quarter	✓	✓		✓	
Southampton Water - Redbridge	✓			✓	
Southampton Airport (Navigator Quarter)	✓	✓	✓		
Southampton Water - Solent Gateway [1]	✓	✓	✓		
Southampton Water - Solent Gateway [2]	✓	✓	✓		
Southampton Water - ExxonMobil	✓	✓			
Southampton Water - Fawley Waterside	✓	✓	✓		
Daedalus EZ	✓	✓			
Portsmouth Lakeside	✓	✓			✓
Tipner West and Horsea Island East	✓	✓	✓	✓	✓
Portsmouth International Port	✓	✓			
Tech Forest	✓	✓	✓		✓
Basing View	✓	✓	✓		✓

3. Digital Infrastructure

3.1 Introduction

The analysis in this section will support the Hampshire Prosperity Partnership Board (HPPB) in prioritising digital infrastructure investment that delivers the greatest economic and inclusive growth impact. It recognises that, despite strong headline coverage in many areas, digital infrastructure provision is uneven in quality, resilience, and suitability for modern economic activity, creating challenges for productivity, competitiveness, and inclusive growth. The review therefore focuses on identifying where targeted digital infrastructure interventions can most effectively strengthen Hampshire and the Solent's economic performance and investment proposition.

The analysis is explicitly framed around supporting economic growth by enhancing competitiveness and site attractiveness, rather than simply addressing basic availability. This gap analysis adopts a holistic, multi-source methodology integrating national connectivity datasets, granular infrastructure mapping, and socio-economic data to identify where provision falls short of what is required to support high-value economic activity. The assessment draws on the following primary, publicly available datasets and those supplied by HCC:

Table 3-1: Digital data sources

Source	Purpose
Ofcom – Connected Nations - Fixed broadband (FTTP, gigabit availability, speeds), mobile coverage (4G/5G) - Years used: 2022–2024 (latest available at time of analysis)	- Connectivity and network performance - Baseline for coverage, speed distribution, and technology type (FTTP vs legacy). - Identification of sub-30 Mbps areas, gigabit gaps, and 5G availability patterns.
ThinkBroadband (independent broadband mapping platform) - Address-level broadband availability, speed estimates, FTTP rollout tracking - Years used: 2023–2025 (live dataset)	- Validation of Ofcom data at finer spatial granularity. - Cross-checking real-world availability vs reported coverage. - Identification of micro not-spots and industrial estate gaps including linear corridor constraints (e.g. A326, A303).
Office for National Statistics (ONS) - Census 2021 (Broadband coverage, deprivation, by OA and LSOA for England) - Index of Multiple Deprivation (IMD) - Years used: 2019–2023 (latest available releases) - HCC broadband data 2020 (shared by HCC)	Identifying overlap between poor connectivity and deprivation.
Department for Science, Innovation and Technology – Project Gigabit - Procurement areas, delivery timelines, intervention zones - Years used: 2022–2025 (programme data)	- Identification of areas in scope for public investment and rollout programmes. - Understanding phasing (e.g. later-stage delivery to 2030).

3.1.1 Contents of this Chapter

The remainder of this chapter is structured as follows:

Section 3.2 Overview of Gaps and Needs and 3.3 Digital Infrastructure and Deprivation

An overview of digital infrastructure provision across Hampshire local authorities, highlighting where infrastructure gaps remain despite high headline coverage. This section explains why these gaps matter for economic growth and inclusion, references the impact of existing connectivity enhancement initiatives (e.g.

gigabit programmes), and identifies residual challenges. It also highlights the spatial overlap between poor connectivity and deprived areas.

Section 3.4 Sectoral analysis aligned to economic priorities

An assessment of Hampshire and the Solent's priority sectors as identified in the Growth Plan, showing where these sectors are geographically concentrated and the targeted digital infrastructure requirements needed to support their competitiveness. The analysis sets out what "good" looks like in overall provision, and explains where current gaps exist, why they matter, and how they constrain growth and scaling of high-value activity.

Section 3.5 Digital Infrastructure Needs for Key Development Sites

A review of strategic employment sites within the region's development pipeline, identifying where focused digital infrastructure interventions could improve development viability and strengthen attractiveness to inward investment. The analysis prioritises business-grade and industrial-grade connectivity, resilience, and consistency of provision, drawing on adopted and emerging development plans and recognising where upgrades may already be underway.

Section 3.6 Strategic Priorities for Investment - Conclusion

A summary of where investment should be prioritised and why it matters for economic growth.

3.2 Overview of Gaps and Needs

This overview highlights where digital infrastructure gaps remain across Hampshire local authorities, despite high overall coverage, and why they matter for economic growth and inclusion. The table also makes references to the impact of existing connectivity enhancement initiatives (example project Gigabit) and the residual infrastructure gaps, and challenges. Addressing these gaps is critical to unlocking productivity, supporting growth in focused sectors, enabling SME's to adopt digital tools, and ensuring the benefits of investment are shared across communities.

Table 3-2: Digital Priorities

Area / Location	Connectivity status	Infrastructure Gap	Why It Matters for Growth
Industrial Estates (Andover, Chandlers Ford, Havant, Fareham)	- FTTP provision varies - High dependence on dedicated private connections	- Gap is not basic FTTP availability instead no affordable 'industrial standard' connectivity (symmetric capacity, resilient routing) - High cost of symmetric bandwidth	Limits automation, IoT and analytics; reduces attractiveness for advanced manufacturing/logistics.
Waterside A326 Corridor (Totton–Hythe–Fawley)	FTTP patchy; mixed mobile 5G coverage	Mobile 5G and gigabit gaps along key industrial/commuter corridor, constrained by linear geography and port/industrial land complexities	Critical for access to Freeport tax sites along Southampton Water; impacts advanced logistics and mobility.
Test Valley– A303/A36 villages (e.g. Longparish, Stockbridge outskirts, Wherwell)	Towns are well served but villages lag behind	- Rural/peri-urban clusters with <30Mbps e.g. Longparish, Barton Stacey area, peripheral Andover villages - Patchy FTTP on A303/A36 corridor (e.g. Wherwell, Nether Wallop hinterland, rural Romsey fringe). - These locations are high-cost and low-priority for commercial providers or rollout schemes, so will be typically delivered late or not at all without targeted intervention - Industrial clusters are currently dependent on dedicated private connections instead of affordable full-fibre broadband.	Key logistics/manufacturing corridor - poor digital infrastructure weakens growth capacity.
East Hampshire / South Downs (e.g. Steep, Hawkley, East Meon, Froxfield)	- Towns are largely provisioned with FTTP - Rural gigabit coverage is around two thirds	- Villages face fibre delivery constraints due to dispersed housing, challenging rural access routes and limited backhaul capacity. - Approximately 5000 premises indicated in scope for the CityFibre Project Gigabit delivery. Majority of these however fall in the 'later stage delivery' status (by 2030). These villages risk being underserved for several years without targeted intervention.	Constrains SME's, remote workers, and tech-linked growth in regeneration towns such as Whitehill & Bordon.
New Forest District (e.g. Brockenhurst hinterland, Nomansland, Godshill, Minstead)	- Patchy FTTP - Limited mobile coverage	Rural & coastal not-spots – fibre roll out contained by landscape challenges.	Impact on provision of public digital services, affects industries such as tourism and hospitality
Southampton – urban micro not-spots and industrial grade connectivity for strategic employment sites.	- Citywide gigbit largely complete - Some residential areas still rely on legacy infrastructure instead of new full-fibre connections.	- In strategic employment locations - port estate, docklands, marine and logistics zones - the focus should be on industrial grade connectivity. - Constraint is no longer network availability, but building-level delivery and legacy internal infrastructure	Digital and creative SME's nearby affected by building-level gaps. Port-related businesses need reliable connectivity
Isle of Wight (Interior & SW Coast)	High overall FTTP	- Remaining 10–15% non-FTTP areas in rural interiors which is costly to deliver. - Up to £9m voucher-backed support aimed at reaching ~17,000 rural premises on the Island (WightFibre/BDUK-identified rural set)	Affects tourism, marine/engineering SME's; digital exclusion risk for rural communities
Hampshire Fringe (Chilbolton Down, Lepe, Farley Chamberlayne, Ibthorpe)	- Multiple slow-speed pockets - Below-average FTTP	- Remaining gap areas are commercially unattractive to operators (neither CityFibre's delivery nor vouchers achieve an economic case) - High risk of long-term exclusion	Hard-to-reach areas limit inclusive growth
Portsmouth (Urban Core and high density estates)	- largely covered by gigabit networks, but uptake remains uneven - strong FTTP across city	- Cost and digital skills barriers limit take-up. Risk of digital exclusion. Older estates face inconsistent mobile coverage. - Naval, marine, defence and port-related employment sites lack uniform provision of industrial grade connectivity.	Constrained labour market participation and slow digital adoption among local SME's, despite the city's overall strong network availability.
Digital exclusion hotspots (Havant, Gosport, Portsmouth, Southampton)	High gigabit supply but low uptake	Cost and skills barriers are limiting effective use of existing connectivity	Reduces benefits of investment; constrains labour force participation and SME digitisation.

High Priority Medium Priority

The highlighted areas have been prioritised for investment as they underpin Hampshire and the Solent's economic performance and inclusive growth due to the following factors:

- High-priority areas include industrial estates, the Waterside corridor, Freeport sites, and port corridors. These areas host strategic employment locations and are critical to growth across priority sectors. The focus should be on industrial-grade connectivity (estate fibre rings, neutral-host 5G, resilient backhaul), not just basic FTTP availability. Investment here is expected to deliver the highest return and support the attraction of high-value occupiers.
- Medium-priority areas include rural villages in Winchester and Test Valley, South Downs communities, and Hampshire fringe clusters, where coverage risk remains high due to deferred or later-stage delivery. Improved connectivity will support inclusive growth and workforce participation.

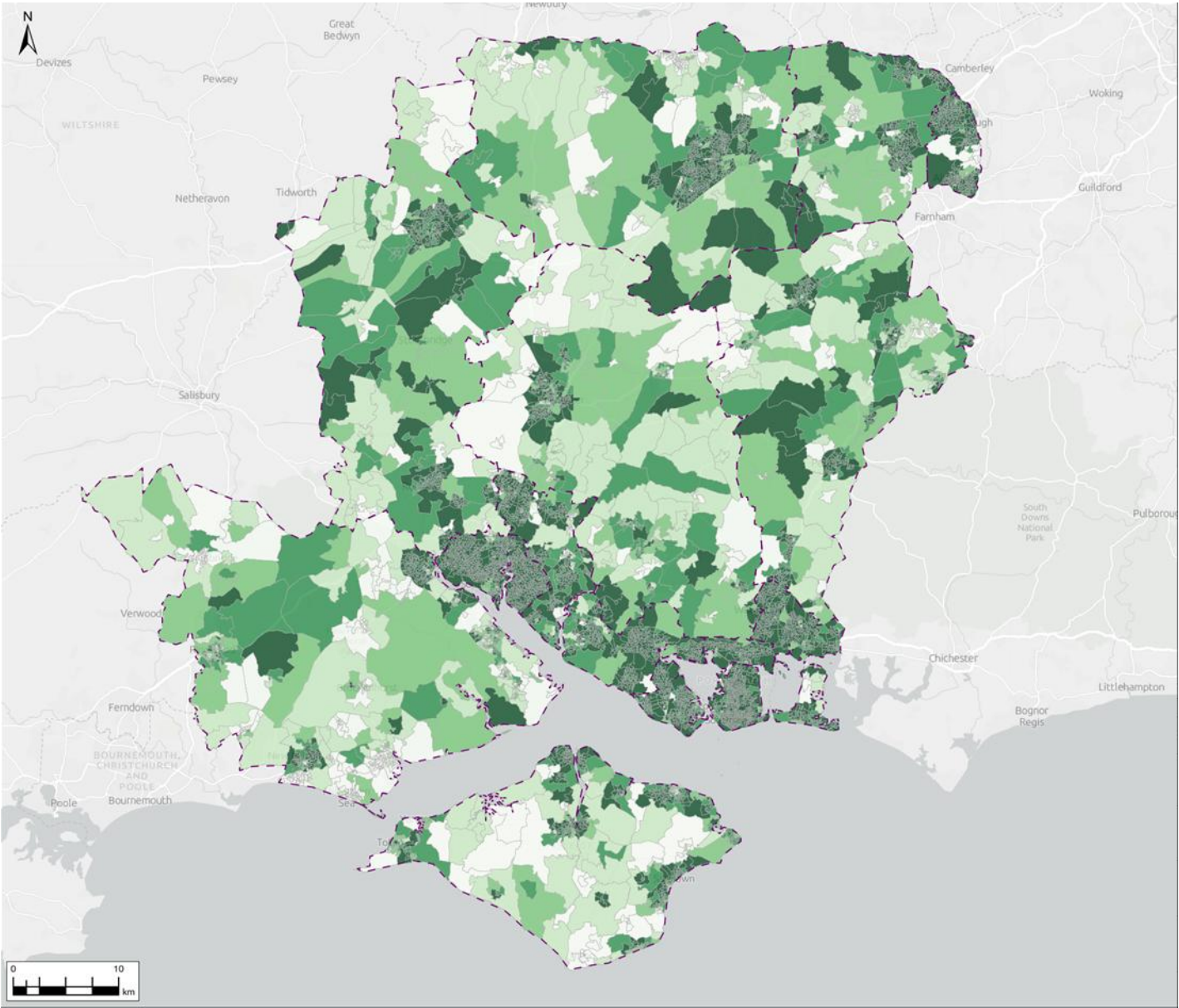
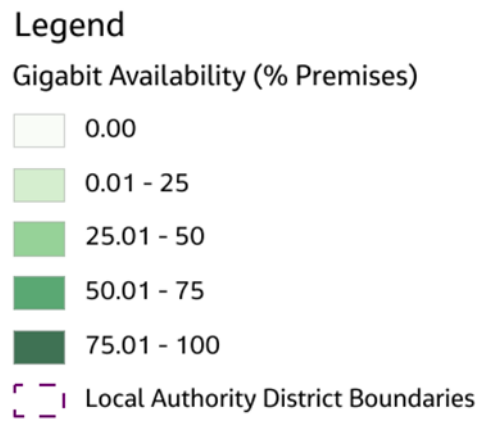


Figure 3-1: Map showing gigabit availability in the Hampshire region



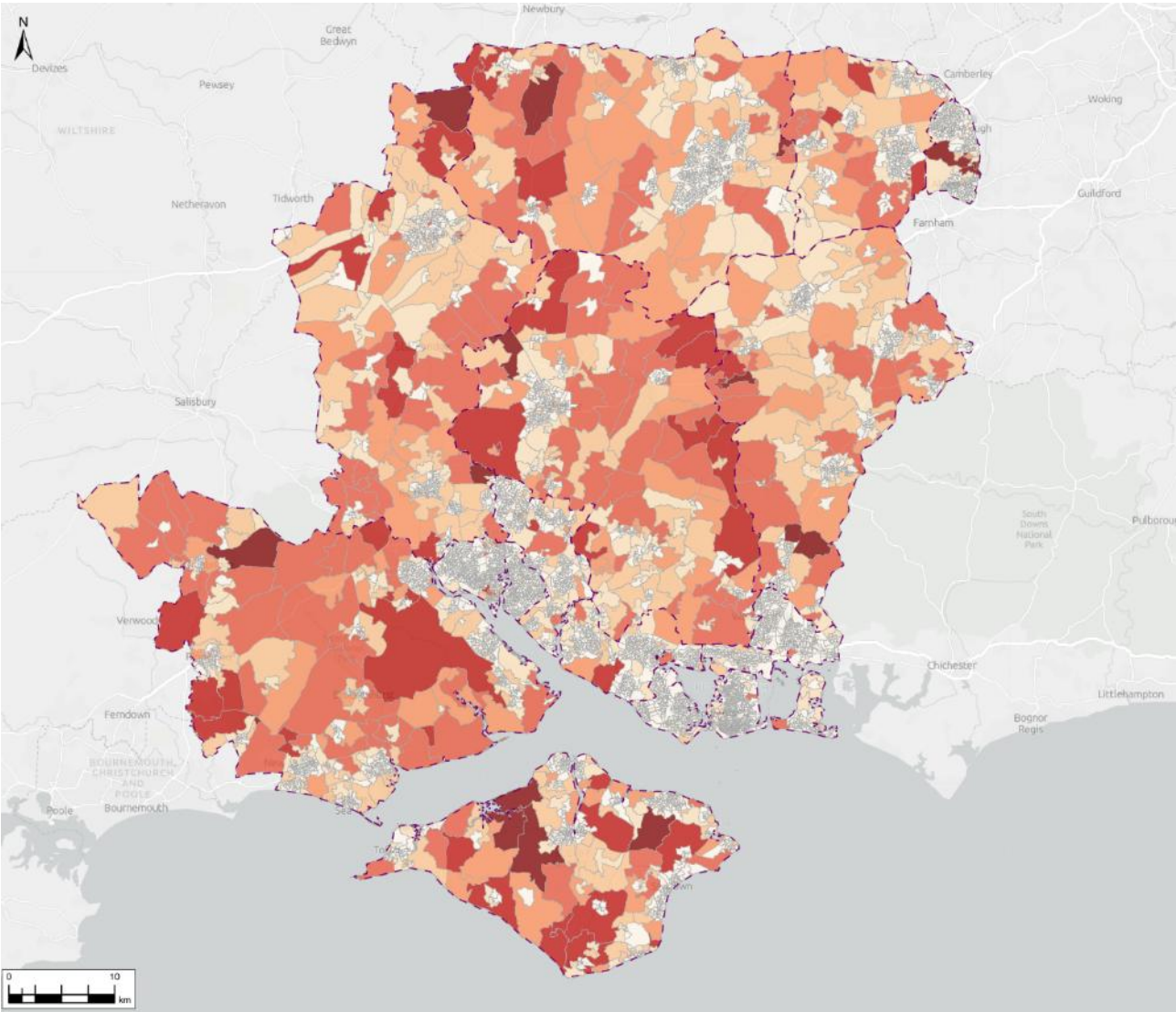


Figure 3-2: Map showing areas with poor connectivity (less than 30 Mbps/s in the Hampshire and Solent region)

Legend

% Of Premises Unable To Receive 30Mbit/s

- 0.00
- 0.01 - 5
- 5.01 - 15
- 15.01 - 25
- 25.01 - 50
- 50.01 - 75
- 75.01 - 100

Local Authority District Boundaries

3.3 Digital Infrastructure and Deprivation

The map below shows a spatial overlay of areas with poor connectivity (less than 30 Mbps/s and pockets of multiple deprivation in the Hampshire and Solent region. Rural areas in Test Valley, Winchester hinterland, East Hampshire/South Downs, the Hampshire Fringe, and the Isle of Wight interior show high proportions of premises unable to achieve basic broadband speeds, often overlapping with LSOAs exhibiting deprivation linked to income levels, ageing populations, and weak access to services. In Southampton, Portsmouth, Havant and Gosport, most areas are technically served by gigabit networks, yet highly deprived LSOAs persist, indicating barriers related to affordability, skills, and low take-up rather than lack of physical coverage. Many strategically important employment and industrial sites are surrounded by most deprived neighbourhoods.

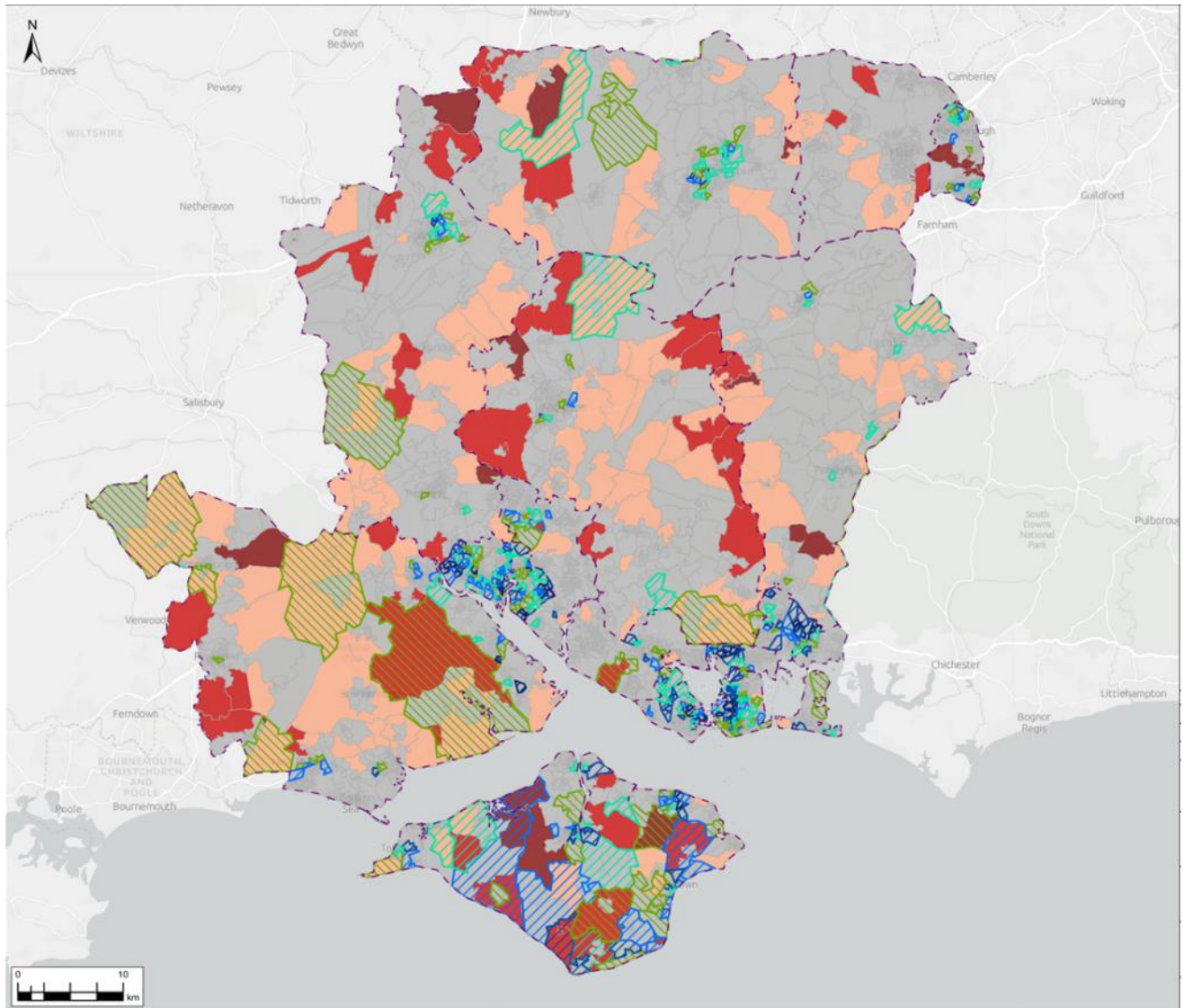
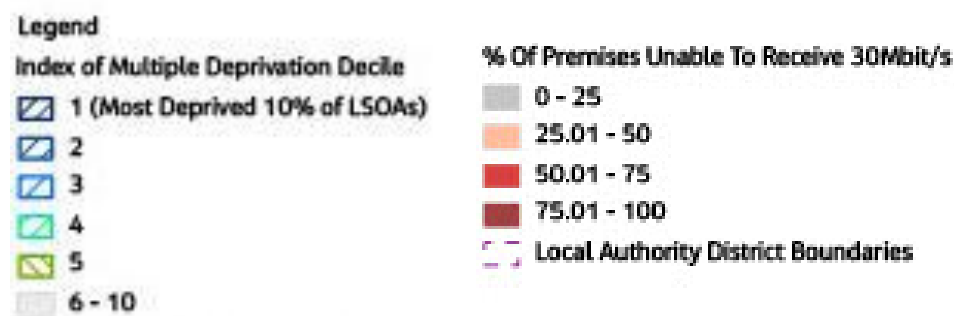


Figure 3-3: Map overlaying IMD's with % of premises unable to receive 30Mbit/s



3.4 Digital Infrastructure Needs for High Priority Sectors

This sectoral analysis sets out the digital infrastructure required to position Hampshire’s key economic clusters as competitive, investable locations, taking inspiration from best practice provision. The focus is not minimum connectivity, rather targeted upgrades needed to enhance attractiveness, and support and scale high-value activity.

Methodology for Digital Infrastructure Needs Assessment

The tables in sections 3.4 and 3.5 were developed using a place-based, sector-led digital infrastructure assessment approach, aligned with best practice in economic development and smart specialisation. The approach moves beyond availability mapping to define operationally-derived infrastructure requirements tied directly to sector function, productivity drivers, and investment decision criteria. This includes identifying functional gaps in capacity, resilience, affordability, and deployability—based on the following steps and considerations:

- **Use-case identification:** For each sector, core high-value and future-oriented activities were defined (e.g. real-time simulation in defence, UAV testing in aerospace, automated handling in ports, AI workloads in digital sectors).
- **Digital dependency mapping:** Each activity was translated into high-level digital performance requirements, based on factors such as bandwidth (e.g. multi-gigabit symmetric for simulation), latency thresholds (e.g. low latency for real-time control systems), reliability and resilience (e.g. dual-path fibre for mission-critical operations) and device density (e.g. IoT environments in ports/logistics)
- **Digital Infrastructure translation:** These requirements were then mapped to specific infrastructure requirements – Fibre, Wireless systems (private 5G, neutral host DAS), Compute layer (edge vs hyperscale cloud access), etc. Examples:
 - Private 5G is required where real-time control, high IoT density, or mobility is essential.
 - Edge computing is required where latency-sensitive processing cannot rely on distant cloud infrastructure.
 - Dual-route fibre is required where business continuity risk is unacceptable (defence, finance, ports).
- **Evidence-based validation:** The identified requirements were informed by professional judgement and real-world deployment examples demonstrating how infrastructure enables specific operational outcomes. This includes looking at best-in-class comparators such as - Harwell Science and Innovation Campus (R&D / life sciences/space), Port of Singapore (global maritime), Port of Rotterdam (Maritime/logistics).

Table 3-3: Digital Infrastructure Needs for High Priority Sectors

Sector	Clusters	Digital infrastructure needs to support attractiveness	Current gaps
Defence	• Requirements: Industrial estates, naval docks, secure R&D facilities. • Spatial focus: Portsmouth Naval Base; Gosport, Fareham; Farnborough defence and aerospace technology campus; Winchester and Andover MoD sites.	• Ultra-secure multi-gigabit full-fibre rings (1–10 Gbps symmetric FTTP) into naval and defence manufacturing zones – with dual-diverse routing for resilience. • Private 5G networks for estates for autonomous vehicles, secure communications, real-time testing of sensors and UAVs. • Local edge compute/data centres within the Solent region to host modelling, simulation and cyber-analytics locally.	• Historic under-provision of full-fibre in defence-critical areas (notably Gosport) creates operational and investment risk. • Lack of resilient fibre routes around Portsmouth Naval Base undermines continuity for defence suppliers. • Absence of local edge compute pushes high-value analytics to London or Corsham, weakening Hampshire’s defence offer. • No permanent private 5G test environments on MoD sites limits innovation pilots.
Aerospace/ Space	• Requirements: Large hangars, flight-testing facilities, design labs, corporate offices. • Spatial focus: Farnborough; Daedalus Airfield (Lee-on-Solent); Eastleigh (Southampton Airport); Portsmouth University innovation districts; Basingstoke.	• Full-fibre connectivity to every airfield, hangar and lab, with reliable gigabit speeds to support testing, digital design and data-heavy engineering work. • Direct high-capacity links between aerospace sites and university research and cloud platforms to support joint R&D with Southampton and Portsmouth universities. • Private 5G across airfield zones to enable drone and UAV testing, smart maintenance systems and real-time sensor data.	• Competing aerospace clusters already offer dedicated 5G test facilities; without similar capability, Hampshire loses R&D trials and inward investment. • Some Solent airfield business parks still lack full-fibre coverage and resilient connections, creating risk for data-intensive firms. • Limited access to research-grade networks forces large simulation and design data onto standard broadband, putting Hampshire firms at a competitive disadvantage.
Maritime	• Requirements: Ports, shipyards, logistics parks and marine manufacturing • Spatial focus: Port of Southampton; Portsmouth International Port; Gosport (Marchwood; Solent Enterprise Zone)	• High-capacity fibre across quays, warehouses and customs zones (1–10 Gbps). • Permanent site-wide private 5G at Southampton and Portsmouth ports to support asset tracking, automated gates, drones and assisted operations. • Local edge computing to support low-latency control, and digital twins.	• Large legacy dock estates still lack universal full-fibre and modern internal connectivity. • Other Freeports are deploying permanent port-wide 5G; Southampton risks missing automation and investment without it. • Limited backhaul resilience at some Solent facilities puts future smart-port programmes at risk.
Creative industries	• Requirements: Studios, production spaces and co-working hubs • Spatial focus: Winchester; Basingstoke; Rushmoor (Hart gaming cluster), Portsmouth city-centre (media firms)	• Affordable symmetric fibre (300 Mbps–1 Gbps) in town-centre creative hubs • Upgraded internal wiring, Wi-Fi and mobile coverage in converted and historic buildings. • Access to dedicated gigabit lines for post-production, and broadcasting.	• Creative firms rely on upload-heavy workflows; weak fibre in older buildings pushes firms to competing cities• Poor in-building connectivity limits collaboration and growth• Lack of shared digital production infrastructure reduces competitiveness for smaller studios.
Digital industries	• Requirements: R&D offices, software campuses and data-intensive startups • Spatial focus: Basingstoke and Deane (Basing View); Winchester digital corridor;	• Multi-gigabit, open-access fibre across all tech parks. • Regional data centre and cloud hubs to support AI, fintech and cyber firms. • Strong 5G coverage around transport hubs and innovation districts.	• Hampshire lacks a major digital exchange point; firms needing low-latency connectivity locate in London or Slough. • Limited dark fibre restricts experimentation and high-performance networking along the M3 corridor.

	Andover Business Park; Rushmoor (Farnborough Cody Tech Park)		• Patchy 5G undermines IoT testing and Hampshire’s tech-ready reputation.
Life Sciences	• Requirements: Laboratories, clinical R&D sites and hospital innovation campuses • Spatial focus: Southampton (Science Park, General Hospital) Eastleigh; Andover, Rushmoor	• Symmetric gigabit fibre to every lab and research facility. • Secure, high-capacity links between hospitals and universities for research collaboration. • Smart campus connectivity to support connected devices, training tools and real-time monitoring.	• Competing clusters (Oxford, Cambridge) offer far higher research connectivity and local data capacity. • Inconsistent fibre across NHS sites limits innovation and collaboration. • Without better digital infrastructure, Hampshire struggles to attract healthcare innovation initiatives.
Professional business services	• Requirements: Corporate offices and finance/legal hubs • Spatial focus: Southampton city centre; Winchester and Basingstoke, Eastleigh, Rushmoor	• Business-grade gigabit broadband across all commercial centres. • Reliable in-building mobile coverage in high-rise and historic offices. • Low latency, fast, secure access to cloud platforms for professional services workflows.	• Competing business districts already offer universal fibre and managed connectivity. • Mobile congestion and indoor signal gaps affect productivity and hybrid working. • Hampshire loses professional services growth to London, Reading, Guildford, Oxford and Brighton where resilient gigabit connectivity and in-building mobile coverage are standard.
Logistics	• Requirements: Distribution parks and large warehouses • Spatial focus: Test Valley, Basingstoke, Andover A303 corridor; M3/A34 freight routes; Fareham and New Forest depots	• High-capacity fibre and gigabit leased lines into all depots. • Private 5G in large yards to support automated vehicles and equipment. • Dense, reliable indoor Wi-Fi for scanners and sensors.	• Many logistics parks rely on single fibre routes; outages can take out entire estates (e.g. distribution sites in Test Valley and along A303). • Mobile blackspots on key corridors disrupt live tracking and fleet management. • Other Freeports are already using private 5G for automated logistics; Hampshire risks losing future investment without action.

3.5 Digital Infrastructure Needs for Key Development Sites

This section discusses strategic employment sites identified within Hampshire and the Solent’s development pipeline and highlights where targeted digital infrastructure interventions have the potential to improve development viability and enhance attractiveness to inward investment. The focus is on strengthening business grade/ industrial-grade connectivity, resilience, and uniform provision, rather than basic availability.

The assessment is informed by a high-level review of adopted and emerging development plans. In some cases, connectivity upgrades may already be underway.

Table 3-4: Digital Infrastructure Needs for Key Development Sites

Site	Opportunity for Viability Gap Funding	Rationale/ value add (Why this matters)
Dunsbury Park	• Fibre spines and lateral FTTP to achieve 100% gigabit-capable coverage across all plots, including edge-of-site logistics units and yards (provisioned: partial FTTP to serviced plots via private developers). • Continuous 4G/5G coverage along key freight corridors (M3, A34, A303, M27). • Neutral-host 5G small-cell deployment along internal estate roads, yards and HGV holding areas (provisioned: macro 4G/5G coverage only, variable indoors). • Industrial-grade Wi-Fi 6/6E within shared warehouse and multi-tenant logistics buildings (provisioned: tenant-led Wi-Fi only).	• Enables automation, real-time logistics and higher productivity • Positions Dunsbury as a “smart logistics park” comparable with leading UK Freeport sites
Central Station Hub/Mayflower Quarter	• Universal business-grade FTTP (1–10 Gbps) with service-level guarantees for all commercial floorspace (provisioned: Openreach FTTP rollout, limited business SLAs). • Dense 5G coverage and indoor DAS for offices, stations, key transport corridors and public realm (provisioned: outdoor 5G, patchy indoor coverage). • Secure interconnection to cloud on-ramps, UK data centre, sector-specific platforms (legal, financial, consultancy). (provisioned: market-led connectivity, no shared access).	• Attracts higher-value professional services, creative and digital occupiers that depend on resilient, low-latency connectivity. • Supports data-intensive, hybrid working. • Strengthens city-centre competitiveness versus other regional CBDs.
Centenary Quay Marine Employment Quarter	• Gigabit FTTP with symmetrical capacity to marine, engineering, R&D units, and offices, with business grade SLA's (provisioned: FTTP to residential-led phases, limited industrial provision). • Private 5G / advanced Wi-Fi across quayside and workshops for testing, telemetry and marine IoT (provisioned: public mobile coverage only). • Reliable 4G/5G in central business districts, stations and key transport corridors.	• Supports growth of marine tech, clean maritime and advanced manufacturing operations by enabling advanced testing and operation. • Reduces barriers for innovation-led SMEs and anchors high-productivity marine employment rather than lower-value uses. • Differentiates the site as a specialist marine innovation location, and anchors marine R&D at the quay edge.
Southampton Airport (Navigator Quarter)	• Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET). • Dedicated fibre rings with dual routing into data centres and cloud providers (provisioned: single-route fibre connections).	• Critical to attracting aerospace, aviation technology and data-intensive employers, and advanced engineering R&D. • Improves resilience for airport-adjacent innovation uses and supports diversification beyond traditional aviation activities.
Southampton Water - Solent Gateway [1]	• Port-wide neutral-host 4G/5G and private wireless covering berths, yards and logistics areas for IoT, tracking, automation and worker safety. (provisioned: fragmented operator coverage).	• Direct productivity and safety benefits for port operations.

Site	Opportunity for Viability Gap Funding	Rationale/ value add (Why this matters)
	High-capacity fibre backhaul to support IoT, tracking and automation systems (provisioned: site-specific private links).	Enables automation, real-time tracking and digital port systems, strengthening Southampton's position as a leading smart port and logistics gateway.
Southampton Water - Solent Gateway [2]	- Continuous 4G/5G and robust Wi-Fi across port estates, yards and berths for IoT, tracking, automation and worker safety. - Additional focus on edge compute connectivity for real-time operational systems (provisioned: limited local processing capability).	- Improves productivity and operational resilience. - Supports future expansion without digital bottlenecks.
Southampton Water - ExxonMobil	Resilient private 5G and fibre networks supporting industrial IoT, monitoring and safety systems (provisioned: legacy industrial comms and private fibre).	- Enables safe, efficient operation of energy and hydrogen facilities. - Supports decarbonisation, digital monitoring and safety-critical operations. - Positions the site for next-generation low-carbon energy uses.
Southampton Water - Fawley Waterside	- Gigabit FTTP to all employment plots including early-phase sites (provisioned: phased FTTP linked to build-out). 5G readiness for advanced manufacturing and clean energy uses (provisioned: baseline mobile coverage).	- Reduces early-phase investment risk, accelerates occupier take-up. - Supports repositioning of Fawley flagship smart coastal community attractive to talent and employers.
Daedalus EZ	Highly resilient fibre backhaul into national networks and port systems – logistics, customs etc (provisioned: single-route fibre connections).	- Supports UAV testing, AR/VR training and defence-adjacent R&D. Essential for higher-value EZ outcomes. - Improves attractiveness to defence, aerospace and advanced engineering firms where resilience and security are non-negotiable.
Portsmouth Lakeside	- Secure, resilient multi-gigabit FTTP (1–10 Gbps) with dual routing for defence and supply-chain occupiers (provisioned: FTTP planned, limited resilience). - Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET) (provisioned: ad-hoc private solutions).	- Supports defence, systems engineering, R&D activities, and data-intensive hybrid working. - Strengthens Portsmouth's competitiveness in nationally significant defence and technology supply chains.
Tipner West and Horsea Island East	- Gigabit+ FTTP to all waterside industrial, port and logistics locations (quay-edge, older estates as well as new parks) (provisioned: partial FTTP). - Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET). (provisioned: no shared provision).	- Enables marine research and resilient coastal development, attracting marine-tech and innovation-led employers. - Unlocks constrained waterside employment land and supports higher-density, higher-value maritime and defence-related uses.
Portsmouth International Port	- Secure, resilient multi-gigabit FTTP (1–10 Gbps) and private 5G across the estate including key defence estates and supply-chain sites, with dual-routed connections. (provisioned: mixed legacy and public mobile networks). - Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET).	- Improves security, port efficiency, safety and productivity. - Strengthens integration with Freeport tax sites. Enhances competitiveness against other UK ferry and freight ports.
Tech Forest and land to the North	- Multi-gigabit, open-access fibre to support digital technology and innovation (provisioned: FTTP to residential, limited open-access). - Strong 5G coverage for campus-style innovation environments (provisioned: baseline 5G).	Positions the area as a competitive innovation district, supporting tech start-ups, scale-ups and R&D-intensive firms that require choice and capacity in connectivity.
Basing View	- Resilient multi-gigabit FTTP across all commercial buildings with shared access to cloud interconnects (provisioned: FTTP rollout underway). - Enhanced indoor 5G coverage for high-density office use (provisioned: outdoor 5G).	Reinforces Basingstoke's role as a digital and professional services hub, supporting higher-value employment and competing effectively with Thames Valley locations.

3.6 Strategic Priorities for Investment

Table 3-5: Strategic Priorities for Investment

Strategic Priority	What to invest in	Why does it matter (economic rationale)
1. Targeted full-fibre resilience for Hampshire's economic engines	Prioritise multi-gigabit FTTP + dual routing to: • Ports & freeport sites (Portsmouth international port, Marchwood / Solent gateway, Dunsbury park and adjacent logistics sites). • Defence & aerospace clusters (Gosport, Farnborough, Daedalus, Andover/Winchester MoD estates). • Science & health campuses. • Strategic logistics corridors (Andover A303, M3/A34 parks, waterside A326 corridor).	• Core urban and flagship sites in Southampton have high-capacity fibre provision. however, outside these cores, many port-adjacent, defence, logistics and research sites rely on single-route fibre, partial full-fibre coverage or variable service quality, particularly at edge-of-city and corridor locations. • Competing regions (freeports, science clusters) already provide resilient gigabit as standard – Hampshire must match this to retain and attract anchor employers. Single-route fibre and partial FTTP remain a material risk to ports, defence, logistics and healthcare innovation.
2. Deploy Private 5G & Advanced Wireless linked to industrial testbeds	• Establish dedicated 5G networks (and Wi-Fi 6) at ports, logistics hubs, defence bases, airports, large industrial parks and enterprise zones. • Support industry testbeds for autonomous systems (e.g. UAVs, drones), smart factories and IoT sensors in these zones via private 5G coverage and edge computing on-site.	• Coverage is uneven across ports, logistics and defence estates, with many sites dependent on public mobile networks not designed for low-latency, high-reliability industrial use. Corridor and Waterside areas are most affected. • Drives innovation & automation: Ultra-low-latency, high-bandwidth wireless enables automation, smart logistics, autonomous systems and secure defence applications– attracting advanced manufacturers. (e.g. Port of Tyne’s 5G network enables smart port applications). • Competitive edge: Other regions are investing heavily in industrial 5G (e.g. Thames Freeport is deploying six private 5G networks).
3. Establish local edge data centres & cloud hubs	• Develop local data and computing hubs in South Hampshire (Solent and M3 corridor) so defence, healthcare, ports and technology firms can process sensitive data and run advanced analytics locally, rather than relying on London-based facilities. • Strengthen direct, high-capacity connections from Hampshire sites to major cloud and research platforms (such as AWS, Microsoft Azure and university research networks).	• Hampshire exports high-value digital activity to London/Slough due to lack of local facilities. • Latency and data-sovereignty constraints weaken defence, health and R&D propositions. • Local compute is a retention and attraction tool for digital, life sciences and cyber firms as well as scaling smart city services and IoT deployments locally.
4. Close the digital divide in rural and underserved areas	• Extend gigabit broadband and strong 4G/5G coverage to remaining rural “not-spots”, with a focus on economically active rural areas: ◦ Test Valley A303/A36 villages ◦ New Forest Waterside & energy corridor ◦ South Downs / East Hampshire self-employment areas ◦ Coastal hamlets linked to marine & tourism supply chains • Support digital inclusion programs (affordable broadband/social tariffs, community Wi-Fi hubs) in urban estates and rural communities to ensure residents and SMEs can actually adopt and use the infrastructure, ensure inclusive growth. • Rural Hampshire is not a single connectivity challenge: chalk valley settlements, National Park villages and coastal hamlets each face distinct constraints and require tailored digital solutions.	• These areas have high self-employment, SMEs and remote professionals but remain connectivity-constrained. • Limits rural productivity, business formation and labour participation. • Small investment closes gaps that otherwise lock out growth sectors (agri-tech, marine, creative, professional services).
5. Smart Growth” Digital Infrastructure in New Developments	• Embed advanced digital infrastructure by design in all major development sites (e.g. Fawley Waterside, Tipner West / Horsea Island, Dunsbury Park, Solent Gateway & Freeport sites). This includes planning for - full-fibre duct networks, 5G coverage, IoT-ready ducting, shared data platforms.	• Future-Proofed Investment: Early provision avoids retrofit cost and de-risks inward investment. • Converts “place vision” into operationally competitive locations where companies can plug-and-play automation, smart energy systems, and digital services from day one. • Creates visible differentiation versus generic employment land.
6. Freeport digital spine	• Create a “Freeport Digital Spine” connecting Solent Freeport sites – a secure data platform and network linking port, tax and customs sites for seamless logistics and innovation sharing.	• A unified digital spine for Solent Freeport multiplies the value of each site by enabling real-time data exchange for port operations, customs, and security across the region creating a connected free-trade ecosystem rather than isolated sites. • A truly smart logistics cluster can serve as a unique selling point for Solent vs other regions.

4. Transport Infrastructure

4.1 Introduction

This section sets out the transport context for Hampshire and the Solent, informed by a review of local, regional and national documents and engagement with Hampshire County Council and members of the Hampshire Prosperity Partnership Board (HPPB). Key transport themes and schemes which could provide opportunity for investment are summarised and prioritised based on their potential to address key issues and policy aspirations.

4.2 Transport Context Overview

Travel patterns within Hampshire and the Solent are varied with multiple urban areas (Southampton, Portsmouth, Winchester, Basingstoke, Eastleigh, Fareham, Gosport and Havant) acting as key destinations / points of journey origin. The region depends heavily on cross-boundary movement of people and goods, with transport issues not aligning neatly with administrative boundaries. The geography of the area is complex, with coastal areas, islands, peninsulas, as well as inland rural areas resulting in there being a range of transport needs and requiring integration of modes such as public transport (including ferries), walking, cycling, micromobility and driving. The complex geography can in some instances mean a reliance on the private vehicle due to limited alternative routes, causing issues with resilience and capacity at peak times.

In terms of cycling, the Propensity to Cycle Tool (PCT)¹⁵ shows the highest percentage of journey work trips by bike take place in Portsmouth and Southampton. Whilst the tool indicates that there is the highest propensity for cycling to work in Portsmouth followed by Southampton, there are also notable opportunities for higher levels of cycling uptake in Aldershot and Lymington. In terms of travel to school by bike, there are opportunities for higher levels of cycling uptake across Hampshire and the Solent. Locations with higher propensity include Portsmouth, Gosport and Haslar peninsula, Mengham, Southampton, Ringwood, Waterlooville, Fordingbridge, Eastleigh, Farnborough, Fleet, Yateley, Tadley, Cowes, Liphook, Basingstoke and Winchester.

Bus use varies across the study area. Southampton has above average bus patronage with the fifth highest bus journeys per head in the country. There have also been success stories such as the introduction of the Eclipse busway connecting Fareham and Gosport with further expansion planned. Portsmouth's bus use is low in comparison but still higher than the national average (5% of those travelling to work use bus versus 4% nationally). As per the Portsmouth Bus Service Improvement Plan, the average bus speed is just 9.3mph and uncompetitive public transport times result in high car dependency. Outside of urban centres, buses are often infrequent or unavailable. Hampshire County Council has lower than average bus use for travel to work (2%) while the Isle of Wight is in line with national averages (4%) despite limited provision. Rail connections are often slow or infrequent in the study area (especially between Portsmouth and Southampton) and connections to London are on congested corridors with limited resilience.

There are high levels of car ownership within much of Hampshire and the Solent, compared to the national average of 1.23 cars per household. Hampshire County Council has the highest level of car ownership (1.48 cars per household) which is comparable with other shire counties (such as Wiltshire at 1.48 and Gloucestershire at 1.42). The Portsmouth and Southampton authority areas have lower levels of car ownership, at 1.01 and 1.08 respectively. These levels are comparable with other city authorities such as City of Bristol at 1.08 and Plymouth at 1.13. Car ownership in the Isle of Wight Council (1.24 cars per household) is in line with the national average.

Southampton has one of the busiest container ports in the UK, with Portsmouth also having a more tourism focused port, hence connections to these two ports is important for the economy of the region.

¹⁵ <https://www.pct.bike/>

4.3 Key Transport Issues

This section discusses some key transport themes in the region and sets the scene for identification and prioritisation of schemes later in the chapter.

4.3.1 Connectivity

The Department for Transport (DfT)'s Connectivity Tool¹⁶ provides an overview of how well connected places are by transport and can be disaggregated by mode of transport (walking, driving, cycling and public transport). The tool provides a connectivity metric which looks at the ability of people to get to where they need to go, measuring opportunity, but also weighting it by propensity to take the options. It looks at the most common modes of travel and destination types, the time taken to reach these destinations, how desirable these destinations are, and people's travel preferences. A grid is categorised by this metric on a scale of 0 (least connected) to 100 (most connected) with connectivity scores calculated as a percentage of the highest score in England and Wales (defined as 100). It should be noted that the tool does not consider the quality of the route, just its existence. Therefore, connectivity could be more limited than shown in the tool, particularly for walking and cycling.

4.3.1.1 Overall (All Modes)

Figure 4-1 shows connectivity by public transport, walking and cycling combined. The areas around Southampton and Portsmouth show the highest levels of connectivity, with pockets of good connectivity in urban centres such as Basingstoke and Winchester, and to a lesser extent Andover. There is also some higher connectivity on key corridors connecting these urban centres. Outside of these urban centres and corridors, connectivity is poor across Hampshire, and large swathes of the Isle of Wight.

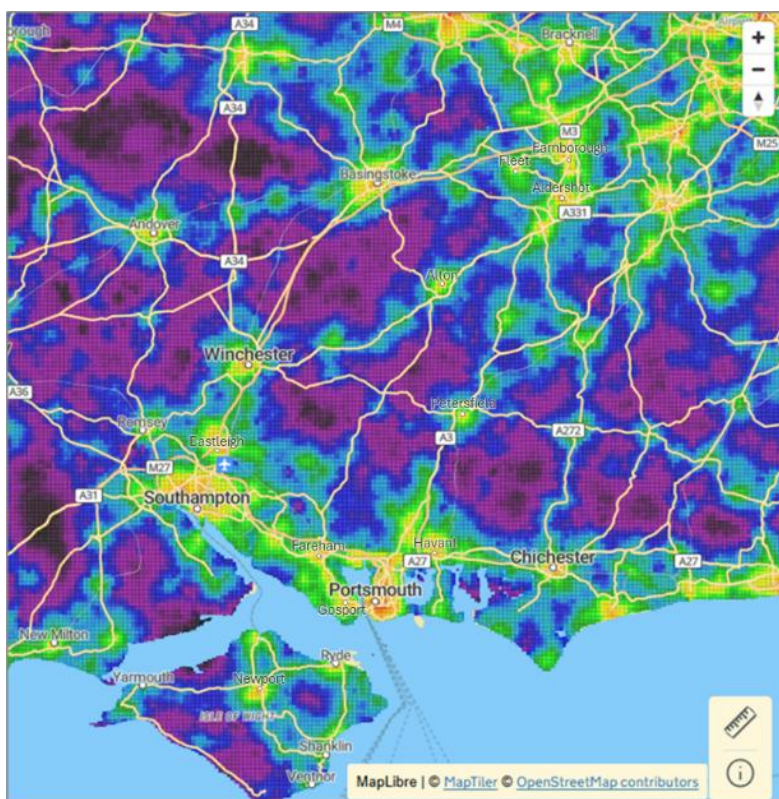


Figure 4-1: Connectivity (all modes)

¹⁶ <https://connectivity-tool-lite.dft.gov.uk/index>

4.3.1.2 Public Transport

Public transport connectivity is similar to overall connectivity, with the best public transport connectivity around Southampton and Portsmouth, with pockets of good connectivity in urban centres such as Basingstoke and Winchester. Again, more rural areas of Hampshire without railway stations or frequent bus routes are highlighted as more poorly connected, as well as the west of the Isle of Wight. There are also parts of areas close to Southampton and Portsmouth with poorer than expected public transport connectivity, such as parts of Waterside.

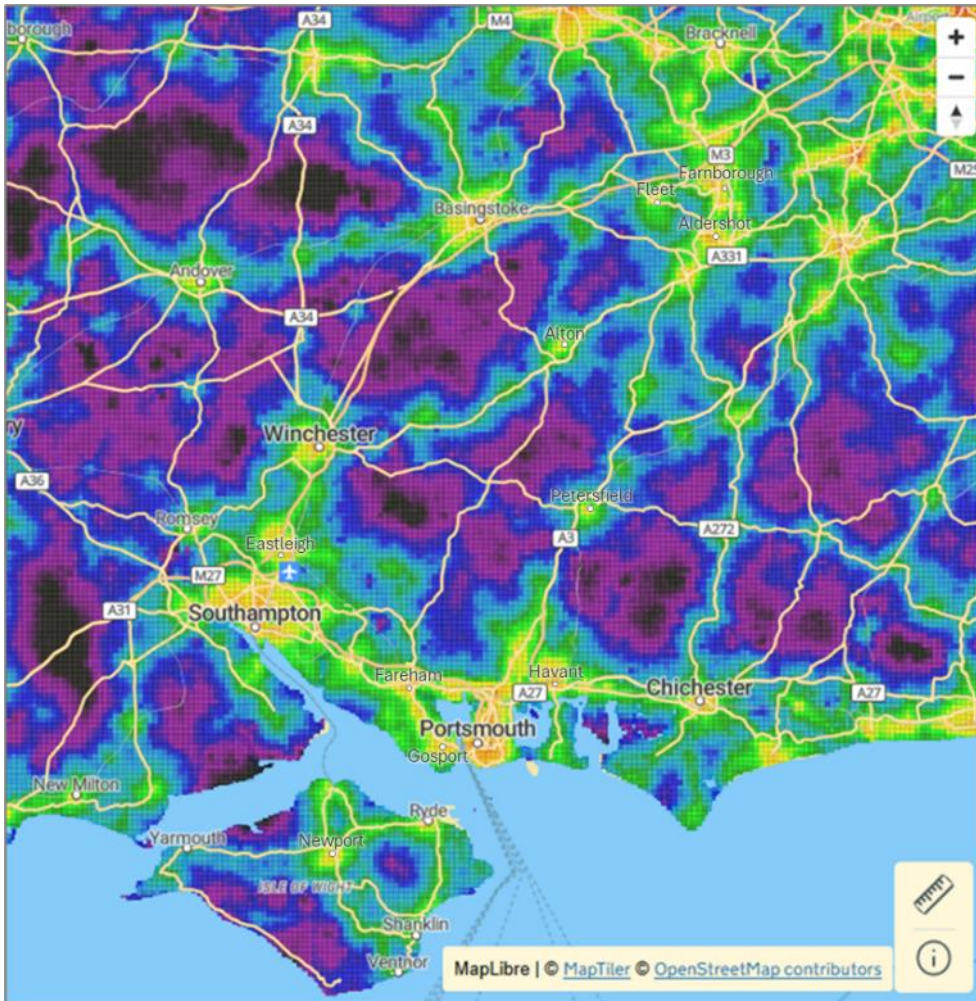


Figure 4-2: Connectivity (public transport)

4.3.1.3 Cycling

The highest levels of cycling connectivity are within Southampton and Portsmouth. It should be noted that the metric does not consider the quality of routes, and while the network is more extensive in these areas than elsewhere in Hampshire and the Solent, there have been issues identified associated with safety and route quality. Urban centres such as Basingstoke and Winchester have the highest cycling connectivity with poorer connections outside the urban areas. Notably, the areas with poorer cycling connectivity are not as extreme as for the areas with poorer public transport connectivity, with the lowest scores around 20.

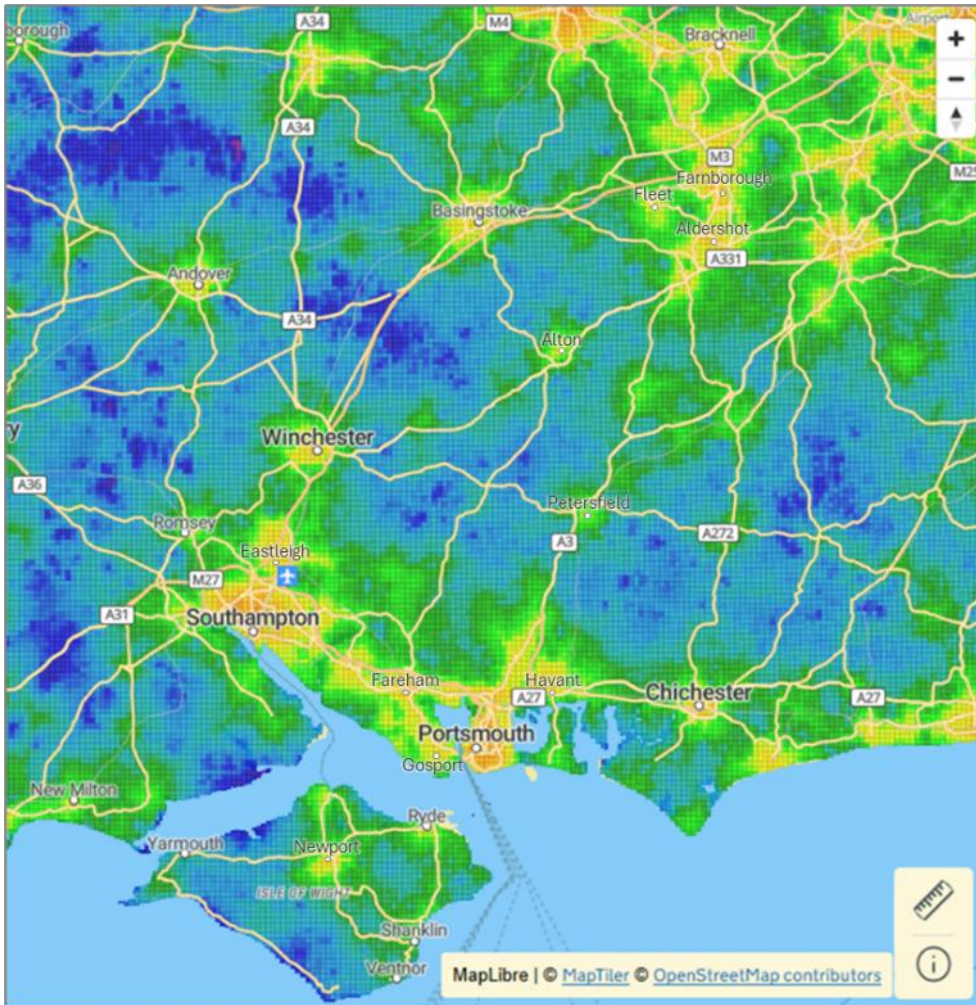


Figure 4-3: Connectivity (cycling)

4.3.1.4 Walking

As with connectivity by other modes, the areas within and around the cities of Southampton and Portsmouth are the best connected for walking, with pockets of good connectivity in urban centres such as Basingstoke and Winchester, and to a lesser extent Andover. Walking connectivity outside urban centres is much poorer than for other modes due to limited demand and therefore limited provision. It should also be noted that due to the geography of the area some walking journeys are limited by the availability of bridges/crossings and require larger detours.

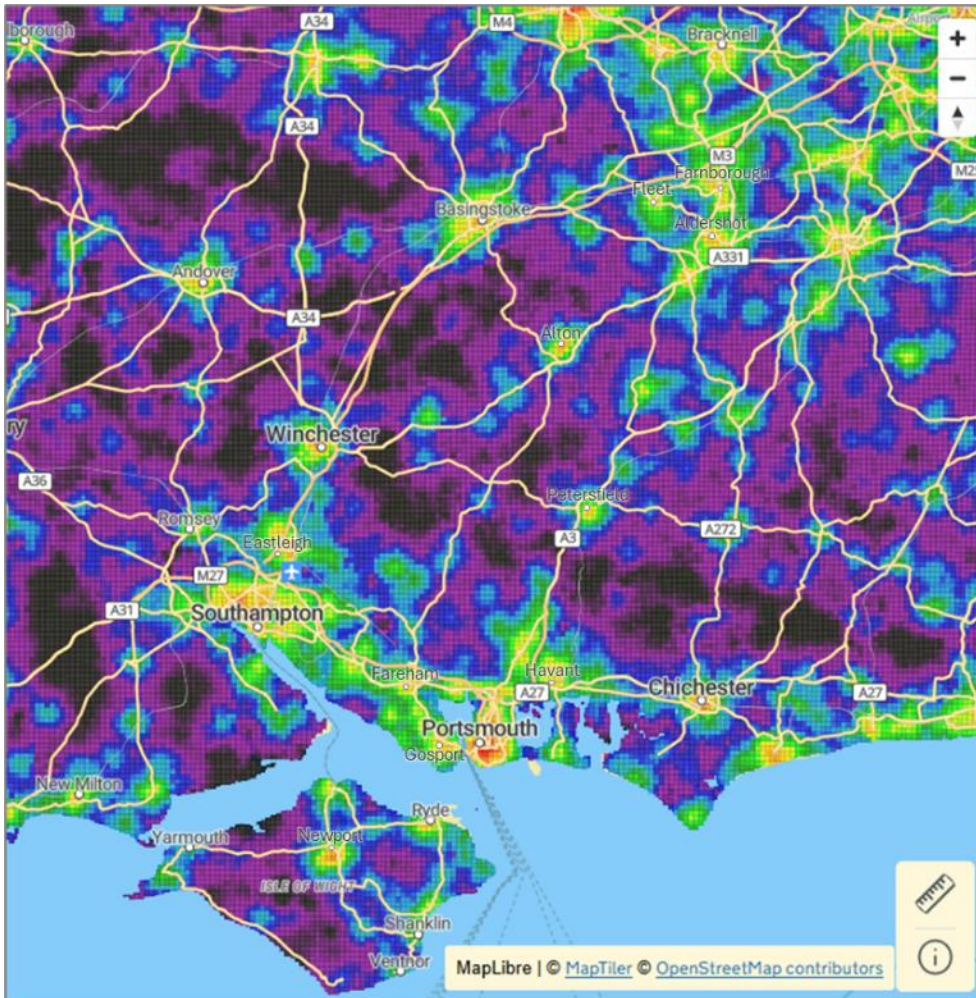


Figure 4-4: Connectivity (walking)

4.3.1.5 Driving

Driving connectivity is good in the study area, in particular around Southampton and Portsmouth, and again urban areas such as Basingstoke, Winchester and Andover. Very few areas have the lowest scores, with even rural areas largely scoring above 25, although there are some patches of lower connectivity on the Isle of Wight. This scoring does not consider the quality of the roads or resilience, which is identified an issue in some areas.



Figure 4-5: Connectivity (driving)

4.3.2 Transport Related Social Exclusion

Transport related social exclusion¹⁷ is a measure that looks at access to a wide range of everyday places with the transport options available, and combines this with a measure of the vulnerability of populations to social exclusion, through factors such as poverty, disability, caring responsibilities, and poor health.

As seen in Figure 4-6, there are areas with a high risk of transport related social exclusion within parts of Havant, Gosport, Andover and the Isle of Wight. There are areas with a medium risk of transport related social exclusion scattered across Hampshire with concentrations in particular in the Solent. Within these areas, the

¹⁷ <https://trse.transportforthenorth.com/>

lack of available transport options limits access to services. Improved connectivity to these location would help to reduce deprivation and social exclusion.

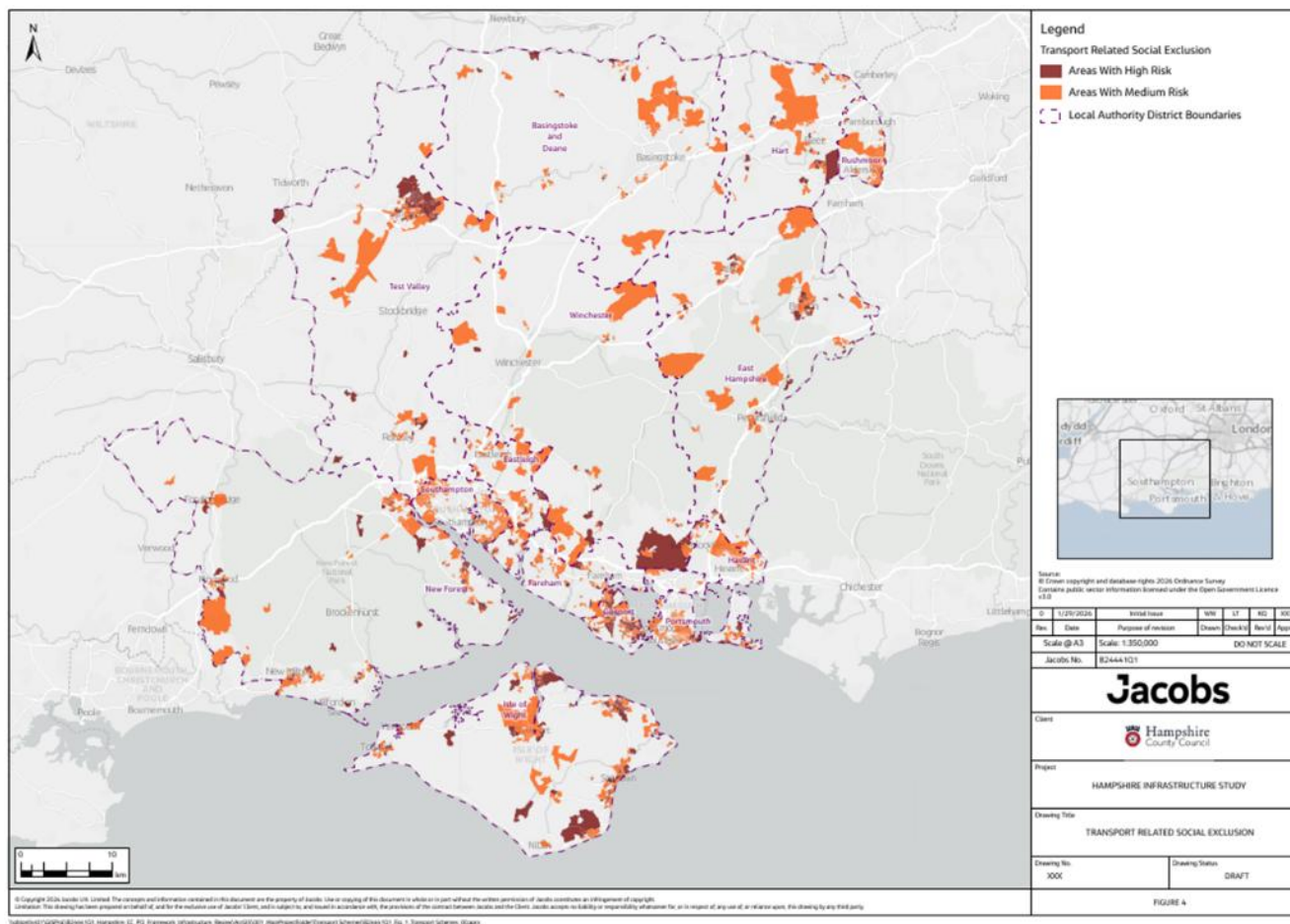


Figure 4-6: Areas with high and medium risk social exclusion

4.3.3 Summary of Issues

A summary of the key transport issues identified as part of this study is provided below:

- There is **poor public transport connectivity** in some areas and **low levels of transport choice** outside main urban areas:
 - Rural areas often suffer from poor connectivity by all modes and have a high level of car reliance.
 - While there are high levels of bus use in places like Southampton, Portsmouth and Gosport (noting the success of schemes such as the Eclipse busway), other areas suffer from poorer coverage.
 - Buses often suffer from delays due to congestion.
 - Slow and infrequent local rail connections are observed (e.g. Southampton – Portsmouth).
 - Rail links to London are often congested. This includes the South Western Main Line, Portsmouth Direct Line and North Hampshire Lines having a significant impact on those, particularly in the north of the study area, commuting outside of the area (e.g. to Surrey / Berkshire / London).
 - Waterborne transport is poorly integrated with other modes.
- There is a large difference between urban and **rural accessibility** in Hampshire and the Solent:
 - While Southampton and Portsmouth are largely urban authorities, large parts of Hampshire and the Isle of Wight are rural and suffer from accessibility challenges.

- These areas have higher reliance on cars and a greater risk of social exclusion, especially for those who do not have access to cars. Commutes by car are longer in rural parts of Hampshire and the Isle of Wight, with proportions commuting by car higher than urban areas and the national average. This can lead to a reliance on cars for access to employment opportunities (see Appendix F for additional travel to work data).
- There are **poor active travel facilities** in urban areas despite high propensity:
 - There are high levels of cycling and high density in Southampton and Portsmouth that make them particularly suitable for active travel however routes are still often not safe or high quality - 16% of all road accidents in Southampton involve cyclists, and 75% of cycle routes in Portsmouth do not meet DfT standards¹⁸.
 - There is a need to improve the attractiveness of town centres and a need for urban regeneration to improve local facilities and connections and reduce the need to travel further to access services, reducing journey trip lengths in the area.
- Need to **decarbonise and electrify fleets**:
 - The region is aiming to meet Net Zero carbon targets, with Hampshire and Portsmouth aiming to achieve carbon neutrality by 2050, Southampton aiming for net-zero carbon emissions for the whole city by 2035, and the Isle of Wight aiming to be a net zero island by 2040.
 - There is a need to improve air quality and decarbonise the transport network, but there are some limitations due to grid supply e.g. Southampton does not have sufficient supply to electrify the bus fleet.
- The **geography** of Hampshire and the Solent presents issues:
 - There is complicated geography in the Solent area especially, with Gosport on a constrained peninsula, Portsmouth mainly formed of an island, Southampton Water separating Waterside from other nearby towns and the Isle of Wight only connected by ferry and hovercraft.
 - This has impacts on resilience in the area, especially relating to some bridges, and also means that there is a need to connect water-based transport into the transport network generally.
- **Freight and logistics** are important to the local economy:
 - Port of Southampton is one of the largest and busiest ports in the UK, and Southampton's LTP4 states the goal of doubling the Port's throughput by 2035-40.
 - In addition to the need to accommodate this growth without negative impacts on communities such as from HGVs, there are also goals to shift more freight onto rail, with the need for associated capacity improvements.
- Strong links to **tourism** in the Solent area in particular:
 - Both Southampton and Portsmouth ports are used by cruise ships with the need to provide connections from the port.
 - Tourism is a major driver of the Isle of Wight's economy with 1 in 6 workers employed in the sector, with higher proportions in the rural areas.
- **Congestion** exists on key routes in Hampshire and the Solent. The transport impacts of planned development needs to be mitigated to ensure congestion is not exacerbated.

¹⁸ As measured with the Route Selection Tool and reported in Portsmouth's Transport Strategy (<https://travel.portsmouth.gov.uk/wp-content/uploads/2021/10/Local-Transport-Plan-2021.pdf>)

4.4 Thematic Scheme Identification

In order to identify and prioritise schemes, as well as gaps in transport infrastructure, a desktop review of various local, regional and national documents was undertaken including:

- Local Transport Plans for the four authorities (Hampshire, Southampton, Portsmouth, Isle of Wight)
- Bus Service Improvement Plans for the four authorities
- Local Cycling and Walking Improvement Plans for all the areas
- Wider regional strategies such as the Transport for the South East Transport Strategy
- National strategies from bodies such as Network Rail and National Highways

Engagement was also undertaken with Hampshire County Council, and members of the Hampshire Prosperity Partnership Board (HPPB) to understand gaps and priorities.

Based on this information gathering, identified schemes were grouped by theme and assessed against the goals of:

- Supporting **development** – the degree to which schemes help to support and enable proposed development across the region.
- Supporting **social inclusion** – the degree to which schemes help to create access to areas identified as suffering from transport related social exclusion.
- Supporting addressing other **key transport issues** – the degree to which schemes support addressing other local issues identified as part of the review such as poor public transport connectivity.

The infrastructure identified and listed in the following tables is suggested for prioritisation, and has been grouped by key themes:

- Mass Transit
- Improved access at Waterside
- Improved connectivity to Gosport
- Access to international gateways and freight
- Improved active travel connectivity and urban centres
- Supporting decarbonisation and air quality improvements
- Mobility Hubs and other improved public transport connectivity
 - Mobility hubs
 - Bus improvements
 - Rail improvements
- Water based transport improvements
- Road improvements

Summaries of each theme and the associated priority infrastructure based on the evidence available is provided in the following pages. Note that additional, less strategic infrastructure, has also been identified and is captured within Appendix G.

4.4.1 Mass Transit and Rail

Mass transit schemes are an opportunity for a step-change in public transport service provision, providing high quality networks that encourage mode shift. There has already been some success in the region with mass transit schemes such as the Eclipse BRT scheme connecting Gosport and Fareham, a specialized, high-frequency bus service operating on dedicated, segregated, and guided busways. There are several key mass transit schemes identified in the regional plans including South East Hampshire Rapid Transit (SEHRT) including express routes, Southampton Mass Transit System (SMTS) and MetroBus, Basingstoke Mass Transit and the Isle of Wight BRT. There are also plans for Solent Rail Metroisation, adapting existing rail systems to allow for greater frequency of services, with several key schemes designed to facilitate that, such as the Southampton Central station upgrade and associated rail frequency enhancement on the Botley and Netley lines.

Table 4-1: Infrastructure Priorities (Mass Transit and Rail)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
South East Hampshire Rapid Transit (SEHRT)	Connecting Portsmouth with its travel to work area by increasing service frequencies, extending operating hours and delivering timetable integration to reduce journey/wait times. Will improve access to strategic sites such as Portsmouth Lakeside, Tipner West & Horsea Island East and Portsmouth International Port.	✓	✓	✓
SEHRT express routes	Improve connectivity to wider city region on existing SEHRT corridors by introducing new express bus routes, likely via M275, on corridors towards Havant/Leigh Park/Waterlooville (including Dunsbury Park). These services would likely be overlaid on existing routes (7,8, 20,21,23) and would aim to significantly expand the proportion of the travel to work area that can travel to central Portsmouth by bus in 45 mins or less, compared to today.	✓	✓	✓
Southampton Mass Transit System (SMTS)	Connecting centres within Southampton and Solent by increasing service frequencies, extending operating hours and delivering timetable integration to reduce journey/wait times. Support development at Central Station Hub / Mayflower Quarter and Centenary Quay.	✓	✓	✓
Southampton Metro Bus Route 1 - Eastleigh / Portswood / City Centre	Introduce high-frequency bus services with network priority, upgraded stops for passenger comfort, and improved interchanges linking key employment, retail and housing areas to boost public transport use	✓	✓	✓
Southampton Metro Bus Route 2 - Hedge End / Bitterne / City Centre	Introduce high-frequency bus services with network priority, upgraded stops for passenger comfort, and improved interchanges linking key employment, retail and housing areas to boost public transport use	✓	✓	✓

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Southampton Metro Bus Route 3 - Romsey / Shirley / City Centre	Introduce high-frequency bus services with network priority, upgraded stops for passenger comfort, and improved interchanges linking key employment, retail and housing areas to boost public transport use	✓	✓	✓
Southampton Metro Bus Route 4 - City Centre Loop	Introduce high-frequency bus services with network priority, upgraded stops for passenger comfort for City Centre loop to link IoW Ferry, Central Station, St Marys Football Stadium, car parks and new City Centre Renaissance development areas	✓	✓	✓
Isle of Wight BRT	BRT system with enhanced connectivity with key cross-Solent ferry services and mainland Rapid Transit, with possibility of integration with Island Line services.		✓	✓
Basingstoke Mass Rapid Transit	An integrated network of new bus-based rapid transit routes across Basingstoke to connect new and existing developments (such as Basing View) with town centre and increase attractiveness of public transport.	✓	✓	✓
Southampton Central Station upgrade & timetabling	Additional platform capacity and enhanced public realm to facilitate interchange at Southampton Central. Three options explored to facilitate increase in passenger/freight service frequency: conversion of bay platform 5 to through platform, addition of platform 0, additional platform to south east of station.	✓	✓	✓
Netley Line signalling/rail enhancements	Signalling improvements on Netley Line between Southampton and Fareham to increase capacity for passenger/freight services	✓		✓
Botley Line dualling (double tracking)	Double tracking of Botley Line between Eastleigh and Fareham to facilitate an increase in passenger/freight service frequency and reliability.	✓		✓

4.4.2 Improved Access at Waterside

There is a large amount of development planned at Waterside, including the Fawley-Waterside development and Solent Gateway (Marchwood Point). Despite its physical proximity to Southampton, the geography of the area means that travel times between the two can be long. The area has poor highways connectivity to strategic routes such as the A326 (which as a single carriageway also experiences capacity issues), and also rail connectivity issues, constrained by capacity issue associated with Totton junction. Access to the area could be improved with increased capacity on the A326, reopening the Waterside railway line, and also making better use of water based transport, with a new ferry service connecting to Southampton. There are also parts of Waterside suffering from transport related social exclusion, such as around Hythe, Marchwood and Totton, which would benefit from increased transport options.

Table 4-2: Infrastructure Priorities (Improved Access at Waterside)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Waterside Branch reopening (A9)	Introduction of passenger services on Fawley Branch Line up to new station in Hythe Town to connect communities/new development sites to rail network and Southampton.	✓	✓	✓
A326 Waterside Capacity (North) (Waterside - A326 Large Local Majors improvements)	Major highway improvement scheme for a northerly section of the A326 in the Waterside area of New Forest District. The scheme will involve: junction capacity improvements; improvements for non-motorised users including new crossing facilities; road widening to provide additional traffic lanes; and environmental compensation and enhancement works. Will support development on Southampton Water.	✓	✓	✓
A326 Multi-modal improvements	Multi-modal improvements to support the Solent Freeport	✓	✓	✓
New Soton-Fawley Waterside ferry service (C3)	New ferry service to support new developments in Fawley and provide fast, reliable and sustainable connection to the city.	✓	✓	✓

4.4.3 Improved Connectivity to Gosport

There is a Solent Enterprise Zone developing at Gosport and Haslar Peninsula at Daedalus. Due to its location on a peninsula, travel times can be long to access areas that are physically relatively close. There is poor public transport provision between Rowner, Daedalus and Lee-on-the-Solent that could be addressed through extensions to the Eclipse busway, additional bus routes, as well as poor cycle access from nearby neighbourhoods that would benefit from additional traffic free routes. Without interventions to address this, any development could end up too car dependent, worsening existing associated congestion and environmental issues. There are also parts of the peninsula suffering from transport related social exclusion, such as around Rowner and Gosport, which would benefit from increased transport options.

Table 4-3: Infrastructure Priorities (Improved Connectivity to Gosport)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Westward bus routes to Rowner, Daedalus and Lee-on-the-Solent	Improving accessibility to enterprise zone at Daedalus.	✓	✓	✓
Eclipse BRT Extension	Extend the busway from Rowner Road to Lees Lane, with bus priority along A32.	✓	✓	✓
Cycle access from Rowner to Daedalus	Improvements to safety including potential for traffic-free segregated path parallel to Shoot Lane	✓	✓	✓
A27 bus priority improvements	A27 corridor improvements to improve bus connectivity, including priority at junctions	✓	✓	✓
A27 cycle improvements	A27 corridor improvements for cyclists including improved access at junctions	✓	✓	✓

4.4.4 Access to International Gateways and Freight

Due to its location on the south coast, the study area contains two international ports: Southampton and Portsmouth, with the Port of Southampton as leading cruise hub and a major cargo container port and the Port of Portsmouth as a smaller more tourist-centric port. The Port of Southampton plans to double its total throughput by 2035-2040 (as included in Southampton's LTP4). This expansion is expected to result in 95% more cruise passengers, 63% more containers, and over 100% more automotive exports passing through the port. In addition to facilitating expansion, there are also goals to reduce emissions and shift more freight to rail, with the need for associated capacity increase and freight handling hubs. Other problems identified include congestion on key freight routes and the lack of suitable truck stop facilities on longer journeys on key routes such as to the Midlands. In addition to facilitating international freight, there are also issues for passengers accessing international gateways including Heathrow airport, which currently requires changing trains, and improving access here could encourage mode shift.

Table 4-4: Infrastructure Priorities (Access to International Gateways and Freight)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Southern rail access to Heathrow airport	Heathrow Southern Rail (HSR) is a privately financed proposal for Southern Access to Heathrow (SAthH) which would allow fast, easy and relaxing access to Heathrow Airport through construction of 8 miles of railway linking Terminal 5 with South Western network.	✓		✓
Western rail access to Heathrow airport	Proposed bi-directional link westward from London's Heathrow Airport to the Great Western Main Line	✓		✓
Havant Rail Freight Hub	To support efficient rail freight operations.	✓		✓
Fratton Rail Freight Hub	To support efficient rail freight operations.	✓		✓
Provision diversionary routes for intermodal freight between Southampton and the West Coast Mainline	Arrangements for diversionary routes to improve resilience for rail freight from the port	✓		✓
South West Mainline / Basingstoke Branch Line enhancement (Basingstoke rail freight bypass)	Installation of bi-directional Basingstoke Regulation loop to relocate all freight movements from the station, increasing capacity on South West Main Line whilst helping to provide for freight growth.	✓		✓

4.4.5 Improved Active Travel Connectivity and Urban Centres

Whilst there have been a large number of active travel improvements across Hampshire and the Solent in recent years, resulting in some high quality walking / cycling routes, active travel connectivity still requires improvement. In some locations, where connections exist, there are issues with discontinuous routes and route quality – for instance, 75% of cycle routes don't meet DfT standards in Portsmouth¹⁹. There is a great opportunity for shifting to active travel in urban centres, with lots of short journeys <5km in Portsmouth and Southampton. Southampton and Portsmouth already have higher levels than national standards and this can be built upon. Some areas have poorer provision, with a lack of footways, poor lighting etc in between villages on Isle of Wight. There are also safety issues to address - 16% of all road accidents in Southampton involve cyclists, despite cycling making up only 1.4% of traffic. There is a need for upgrading urban cycling networks in key conurbations such as Portsmouth, Southampton, Basingstoke and Winchester, as well as providing new connections to developments. There is also a need to regenerate town centres across the study area, creating more pleasant environments for walking and cycling, and also encouraging more local trips to town centre facilities rather than longer trips to out of town facilities. Any regeneration should align with a Healthy Streets approach, while adopting the Hampshire Walking and Cycling Principles and Movement and Place Framework to ensure networks are inclusive, safe and attractive.

Table 4-5: Infrastructure Priorities (Improved Active Travel Connectivity and Urban Centres)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Southampton Cycle Network	Expanding/upgrading existing network, including improvements to routes SCN3 & SCN4 in the east and completing the newly proposed SCN6 connecting to Eastleigh, Chandler's Ford and the airport.		✓	✓
Portsmouth network	To encourage modal shift by creating a comprehensive walking/cycling network that is safe, inclusive, accessible, convenient and attractive.		✓	✓
Gosport and Fareham active travel improvements	Various walking and cycling improvements in Gosport and Fareham	✓	✓	✓
Basingstoke A30 active travel corridor	Major scheme to make cycling and walking easier with a range of improvements centred around the A30 Winchester Road and Winchester Roundabout	✓	✓	✓
Farnborough to Aldershot corridor improvements	Travel improvements along an 8km corridor connecting Farnborough, North Camp and Aldershot including a north to south high-quality walking and cycling route and bus priority measures.		✓	✓

¹⁹ As measured with the Route Selection Tool and reported in Portsmouth's Transport Strategy (<https://travel.portsmouth.gov.uk/wp-content/uploads/2021/10/Local-Transport-Plan-2021.pdf>)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Western corridor cycle route-scheme development	Feasibility studies for provision of LTN1/20 compliant cycle infrastructure between Portsmouth City Centre, Portsmouth International Port, and onwards to Tipner development allocations and to the north of Portsea Island.	✓	✓	✓
East Southampton Active Travel Package	Introduce active travel measures and mobility hubs across East Southampton, Hedge End, Botley, Hamble and Netley, expanding the Solent cycle network and delivering station access plans to improve connectivity and travel choice	✓	✓	✓
Andover town centre regeneration	In support of Andover Town Centre masterplan road space reallocation Eastern Avenue/Vigo Roundabout including major downgrade of roundabout to create people focused space.		✓	✓
Winchester Movement and Place Plan	Bus gate (City Bridge), road space reallocation to reduce one-way system to one lane. Potentially convert some parts to two-way working.		✓	✓
Eastleigh Town Centre Access Plan	Access plan to address air quality and traffic issues in the town centre.		✓	✓
Navigator Quarter Access Plan	Access plan to facilitate development associated with Solent Freeport.	✓	✓	✓
Other town centre regeneration schemes	Schemes in various town centres (e.g. Havant, Gosport), looking to regenerate the urban environment.	✓	✓	✓

4.4.6 Supporting Decarbonisation and Air Quality Improvements

The region is aiming to meet Net Zero carbon targets, with Hampshire and Portsmouth aiming to achieve carbon neutrality by 2050, Southampton aiming for net-zero carbon emissions for the whole city by 2035, and the Isle of Wight aiming to be a net zero island by 2040. Carbon Trust estimates that transport produced 37% of emissions in 2019, latest BEIS data suggests 51%. In order to support a shift to electric vehicles in the region, there will also be a need to ensure that the grid capacity can support this.

Table 4-6: Infrastructure Priorities (Supporting Decarbonisation and Air Quality Improvements)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
West of England Mainline - Basingstoke to Salisbury electrification	Electrification of Basingstoke-Salisbury Line to support decarbonisation of rail network and enable sustainable rail freight movements along the corridor.			✓
Grid capacity for decarbonisation of transport	Improving the grid capacity to allow for support of electric vehicles	✓	✓	✓
Eastleigh to Salisbury Line Electrification	Electrification of Eastleigh-Salisbury line to support decarbonisation of rail network and improve its cohesion.			✓
Rail traction decarbonisation	Decarbonising the rail network either by electrification or use of new technologies such as battery or hydrogen		✓	✓
Bus fleet- Electrification/decarbonisation of remaining bus fleet	Continuation of electrification of bus operator fleets through funding support (including future Zero Emission Bus Regional Area (ZEBRA) funding) for procurement of additional electric buses and associated depot charging infrastructure and grid connections.		✓	✓
Decarbonisation and electrification of private vehicle fleets	Supporting a shift to electric vehicles through provision of charging infrastructure		✓	✓

4.4.7 Mobility Hubs and Other Improved Public Transport Connectivity

While there is high bus use in urban centres such as Southampton and successful schemes such as Eclipse, outside main urban centres services are often infrequent or limited, with many rural areas in Hampshire (e.g. Whitehill, Bordon, parts of Test Valley and New Forest) lacking commercially viable services. Most bus routes operate on shared roads, leading to delays and reduced reliability. Rail services can be slow and infrequent, with poor connections between Southampton and Portsmouth, and high levels of congestion on routes to London. Current interchanges can be poor and outdated, and mobility hubs can bring together multiple modes—such as buses, rail, shared bikes, scooters, and car clubs—alongside enhanced passenger facilities and information, making sustainable travel more attractive and intuitive for users. Improved public transport connectivity is particularly important to reducing transport related social exclusion.

Table 4-7: Infrastructure Priorities (Mobility Hubs and Other Improved Public Transport Connectivity)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
M271 Junction 1 Strategic Mobility Hub	Strategic Mobility Hub including rail, P&R, bus services and active travel options to provide opportunities for efficient multi-modal journeys between M27 and Southampton City Centre.		✓	✓
M27 Junction 5 / Southampton Airport Strategic Mobility Hub	Strategic Mobility Hub including airport, P&R, bus service and active travel options to provide opportunities for efficient multi-modal journeys between M3/M27 and Southampton city centre.	✓		✓
Tipner Transport Hub (M275 Junction 1)	Transport Hub including P&R, bus services and active travel options to provide opportunities for efficient multi-modal journeys and facilitating major regeneration opportunities in the city, including at Tipner West site.	✓	✓	✓
Southsea Transport Hub	Enhanced coastal defence works, improvements to public realm and measures to encourage modal shift to public transport and active travel. This will deliver reduced private car trips, better local air quality and greater resilience for the local area and its economy.	✓	✓	✓
Bitterne Transport Interchange	Create a new transport interchange at Bitterne District Centre to support Park and Travel, Metro and local bus services, and a travel hub, enabling regeneration and improved access to key destinations.	✓	✓	✓
North Winchester P&R and Andover Road busway	New 850 P&R car park off Andover Road and associated bus priority by reopening Andover Road to buses (once closed). Junction changes at either end of Andover Road busway.		✓	✓

4.4.8 Other Rail-Based Connectivity

Table 4-8: Infrastructure Priorities (Other Rail-Based Connectivity)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Eastleigh chord	New rail link to the south of Eastleigh, connecting the London-to-Southampton and the Eastleigh-to-Fareham lines and facilitating more services to Southampton Airport	✓		✓
South West Mainline / Portsmouth Direct Line - Woking area capacity enhancement (Woking Flyover)	Grade separation of Portsmouth Direct Line and the South West Main Line at Woking rail junction on approach to Woking station. This will reduce Portsmouth / Guildford - London journey times and increase capacity on South West Main Line.			✓

4.4.9 Water-Based Transport Improvements

The Solent has difficult geography, with settlements on peninsulas and island, leading to a need for bridges and ferries to connect areas and avoid long journey times by land. Isle of Wight pays the "Island Premium" as its only accessible by ferry. Several areas with key developments such as Waterside (separated from Southampton by Southampton Water) and Gosport (geographically close to Portsmouth but only easily accessible by ferry) are in areas where there is an opportunity to make greater use of water based transport to improve connectivity. While the water can act as a barrier, there could also be opportunities to take advantage of it with schemes such as water taxis

Table 4-9: Infrastructure Priorities (Water-Based Transport Improvements)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Increase ferry services between IoW and mainland	Extend service hours into early morning and late evening to improve access to Southampton and Portsmouth		✓	✓
Improved ferries to Gosport & Hayling Island from Portsmouth	Enhancements to ferry services to provide faster, more frequent and reliable services for residents accessing Portsea Island.		✓	✓

4.4.10 Road Improvements

Various schemes have been undertaken in recent years to address congestion in the area such as on the M27. Works are currently underway on various schemes to accommodate future growth. In addition to this, there are schemes that aim to address safety concerns on the road network, such as at M3 J7 or on the A34. There is also the need for schemes to improve resilience, such as the Hayling Bridge renewal and Northam Bridge replacement, with some parts of the study area having limited alternatives in case of issues, due to the geography.

Table 4-10: Infrastructure Priorities (Road Improvements)

Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
M3 J9 (under construction)	Upgrades to facilitate better movement from A34 to M3 including strategic freight movements and helping to accommodate future growth.	✓	✓	✓
M27 J10 (under construction)	Improvements package to facilitate delivery of new homes.	✓		✓
Botley Bypass (under construction)	Bypass for Botley village to reduce impact of strategic traffic on residents	✓		✓
M27 junction enhancements	Enhancements to M27 (Junction 7 to Junction 9)	✓		✓
M3 improvements	Improvements to junctions on the M3 in Basingstoke (Junction 6 to Junction 9). Will support development at Basing View.	✓		✓

4.5 Key Transport Priorities

Sections 4.4.1 to 4.4.10 set out how transport improvements by theme support development, social inclusion and the alleviation of key transport issues. Based on this review, the following themes are considered to be key strategic transport priorities for Hampshire and the Solent:

Mass Transit Systems and Rail improvements

These provide an opportunity for step-change in public transport service provision. Routes should be designed to connect to key developments, mobility hubs/interchanges, and address key gaps in connectivity.

Improved access at Waterside and connectivity to the Gosport and Haslar peninsula

Both areas have significant proposed development and large amounts of transport related exclusion due to the area's geography, with connections to Southampton and Portsmouth respectively relatively long. There is an opportunity to improve connections to unlock development and increase social inclusion.

Improved facilities for freight and access to international gateways

Southampton Port envisages doubling of throughput by 2035-2040 – in order to deliver this, suitable facilities will be needed for freight transport given constrained geography, and in order to reduce impact on road network and make growth sustainable, there is a need to increase capacity for rail freight in particular, although road freight facilities will also still need enhancing.

Improved active travel networks and enhanced urban centres

Improvements to active travel networks in urban centres are required to support sustainable mode shift, as well as a need for urban regeneration to reduce the need to travel further and so reduce dependence on the car.

5. Summary and Conclusions

5.1 Overview

The evidence collated through this study has been reviewed and summarised, with two key focus areas - strategic and geographic.

5.2 Summary of Findings – Strategic Priorities

This study has undertaken an evidence-based analysis of existing data, reports and strategies. This analysis had a specific focus on three key discipline areas, each of which has been discussed in turn within this report. For each discipline, a set of key strategic priorities have been established and are shown in the table below.

Table 5-1: Strategic Priorities by Discipline

Discipline	Priorities
Employment Land and Development	- Respond to 'flight to quality' by refurbishing existing, ageing assets and providing new, high quality, sustainable assets. - Attracting inward investment / viability gap funding.
Digital	- Targeted full-fibre resilience for Hampshire's economic engines. - Deployment of Private 5G & Advanced Wireless in Strategic Industrial Clusters. - Establish local edge data centres & cloud hubs. - Close the digital divide in rural and underserved areas. - Smart Growth Digital Infrastructure in New Developments. - Freeport digital spine.
Transport	- Mass Transit Schemes and Rail improvements. - Improved access at Waterside and connectivity to the Gosport and Haslar peninsula. - Improved facilities for freight and access for international gateways. - Improved active travel networks and enhanced urban centres.

5.3 Summary of Findings - Geographically

In addition to the strategic priorities, location-specific priorities have also been identified. The sites (as per Table 5-2) have been identified as the sites that could be most attractive to inward investment and occupier interest with delivery of appropriate enabling infrastructure - such as the transport, digital and other infrastructure improvements listed²⁰. While this report has identified other potential sites throughout the region that may provide opportunity for investment, the locations listed below offer specific high-value opportunities for investment, and tackle some of the region's infrastructure deficits. It should be noted that due to the location of several large conurbations and strategic ports in the south of the study area there are a majority of sites also located in the south, but it is important to also recognise the strategic importance of sites in central and north Hampshire such as Tech Forest and Basing View.

²⁰ Further details on the rationale for selecting these sites as strategic development sites is provided in Section 2.4.3

Table 5-2: Summary of infrastructure priorities by strategic development site

Site	Transport	Digital	Environment	Enabling Works	Utilities
Dunsbury Park	- Local and strategic road network decongestion and capacity improvement schemes. - Sustainable travel links (active mode, public transport) to Leigh Park and Waterlooville. - SEHRT express routes serving Havant, Waterlooville, Leigh Park.	- Continuous 4G/5G coverage along key freight corridors (M3, A34, A303, M27) and across yards and loading bays. - Robust Wi-Fi 6/6E inside warehouses for automation and real-time inventory.			
Central Station Hub/Mayflower Quarter	- Local active mode connectivity improvements between central station and shopping areas (Southampton Cycle Network). - Southampton Mass Transit System (SMTS). - Major transformational infrastructure (e.g. Green Bridge to Mayflower Park; Portland Link). - Extensive public realm improvements. - Highway works to Mayflower Circus and Maritime Boulevard.	- Universal gigabit-capable access (FTTP or cable) for town- and city-centre offices, with business-grade SLAs. - Reliable 4G/5G in central business districts, stations and key transport corridors. - Secure connections to cloud and sector-specific platforms (legal, financial, consultancy).	Strategic flood defence.		
Centenary Quay Marine Employment Quarter	- Public realm improvements to Woolston. - Southampton Mass Transit System (SMTS).	- Universal gigabit-capable access (FTTP or cable) for town- and city-centre offices, with business-grade SLAs. - Reliable 4G/5G in central business districts, stations and key transport corridors. - Secure connections to cloud and sector-specific platforms (legal, financial, consultancy).		Support for site remediation.	
Southampton Airport (Navigator Quarter)	- Strategic road network decongestion and capacity improvement schemes. - Enhanced active mode linkages - Improved road and servicing infrastructure into the site. - Replacement of Wide Lane Rail Bridge with a new structure capable of accommodating HGV traffic in both direction as well as active modes.	Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET).	Potential local flood defence.		
Southampton Water - Solent Gateway [1]	- Major highway improvements to the A326 between West Totton and Dibden. - Reopening of the Waterside rail line between Totton, Marchwood and Hythe Town. - Dredging/widening of the main navigational channel to Southampton Port.	Continuous 4G/5G and robust Wi-Fi across port estates, yards and berths for IoT, tracking, automation and worker safety.	Protection or reprovion of protected habitats or other sensitive environmental receptors.		
Southampton Water - Solent Gateway [2]	- Major highway improvements to the A326 between West Totton and Dibden. - Reopening of the Waterside rail line between Totton, Marchwood and Hythe Town. - Dredging/widening of the main navigational channel to Southampton Port.	- Continuous 4G/5G and robust Wi-Fi across port estates, yards and berths for IoT, tracking, automation and worker safety. - Additional focus on edge compute connectivity for real-time operational systems.	Creation of a new country park.		
Southampton Water - ExxonMobil	- Major highway improvements to the A326 between West Totton and Dibden. - Reopening of the Waterside rail line between Totton, Marchwood and Hythe Town. - Dredging/widening of the main navigational channel to Southampton Port.	Continuous 4G/5G and robust Wi-Fi across port estates, yards and berths for IoT, tracking, automation and worker safety.			
Southampton Water - Fawley Waterside	- Major highway improvements to the A326 between West Totton and Dibden. - Reopening of the Waterside rail line between Totton, Marchwood and Hythe Town. - Dredging/widening of the main navigational channel to Southampton Port.	- Continuous 4G/5G and robust Wi-Fi across port estates, yards and berths for IoT, tracking, automation and worker safety. - Gigabit FTTP to all employment plots including early-phase sites.	Environmental enhancements and mitigations to the Strategic Land Reserve/SSSIs.		
Daedalus EZ	- Improvements in active mode infrastructure from Rowner to Daedalus. - Provision of westward bus routes to Rowner, Daedalus and Lee-on-the-Solent. - Enhance BRT / Eclipse bus services including junction improvements to improve accessibility.	Highly resilient fibre backhaul into port community systems and customs/logistics platforms.			

Site	Transport	Digital	Environment	Enabling Works	Utilities
Portsmouth Lakeside	- South East Hampshire Rapid Transit (SEHRT) – extending the network - New Lakeside access to aid development of Lakeside North Harbour - Portsbridge Roundabout (c. £2.0m). - New direct access 'Lakeside Access' (c. £2.4m). - Accessibility improvements, including reinstalling pedestrian crossing and improving crossing environment for pedestrians at junctions. - Portsmouth Cycle Network – improvements and extensions to the network	- Secure, resilient multi-gigabit FTTP (1–10 Gbps) into key defence estates and supply-chain sites, with dual-routed connections. - Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET).			Wastewater network reinforcement.
Tipner West and Horsea Island East	- South East Hampshire Rapid Transit (SEHRT) – extending the network - Horsea-Tipner Link Bridge: to provide a public transport / active modes link between Tipner and Horsea Island and improve sustainable travel network. (>£10m). - Tipner Transport Hub Scheme - P&R (>£10m). - Portsmouth Cycle Network – improvements and extensions to the network	- Gigabit+ FTTP to all waterside industrial, port and logistics locations (quay-edge, older estates as well as new parks). - Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET).	Provision of new flood defences at Tipner West (£32m).	Relocation of Harbour School's Bay Campus (SEND); site remediation.	- Reinforcement or connection to gas network infrastructure would be required. - Wastewater network reinforcement.
Portsmouth International Port	- South East Hampshire Rapid Transit (SEHRT) – extending the network - Continental Ferry Port FCERM Scheme - Provide new / improve the standard of existing coastal defences. (£8.5m, only c. 50% available from EA). - Upgraded junction at Whale Island Way: Potential provision of a new junction to meet the needs of a new ferry service and associated facilities. - Rudmore Square right hand turn: Addition of right hand turn and adoption of Whale Island Way to facilitate HGV traffic flow. (<£500k). - Container Shuttle to Fratton railfreight yard/ Fratton Railfreight Hub. - Tipner Transport Hub Scheme - P&R (>£10m). - Portsmouth Cycle Network – improvements and extensions to the network	- Secure, resilient multi-gigabit FTTP (1–10 Gbps) into key defence estates and supply-chain sites, with dual-routed connections. - Dedicated high-capacity links to cloud/HPC and national research networks (e.g. JANET).			
Southampton Water – Redbridge	Local highway improvements to support connectivity to SRN.			Site remediation.	
Tech Forest and land to the North	Active travel connections to tie into existing Green Loop.	Multi-gigabit, open-access fibre and strong 5G coverage to support digital technology and innovation.	- Part of the site lies within Oxney Farm Woodland SINC. Requirement to achieve biodiversity net gain elsewhere. - Local flood defence schemes to minimise risk of surface water flooding at western end of site.		Minimal utilities infrastructure in (eastern) part of the site.
Basing View	- Provision of facilities for cyclists, pedestrians and public transport to access Basing View in a safe and convenient manner, including integration with the town centre and railway station and the necessary mitigation works for the wider highway network (e.g. Eastrop Roundabout (A3010, Churchill Way) improvements). - M3 Junction 6, 7 & 8 improvements.	Multi-gigabit, open-access fibre and strong 5G coverage to support digital technology and innovation.	Improvements to Eastrop Park (£4.8m) and War Memorial Park (£2.35m).		Low carbon technologies on site, including district heating and CHP.

5.4 Conclusions

Infrastructure priorities have been established against three key disciplines – employment land, digital and transport. These three disciplines, whilst considered separately in this study initially, have obvious overlap and are key components to ensure continued economic growth across the Hampshire and Solent area. The study has focused on existing evidence that is publicly available to provide a foundation for priorities in the sub-region. Most priorities are seen primarily through the lens of employment land, being a critical driver for supporting the prosperity of the area and underpinning much of the growth potential.

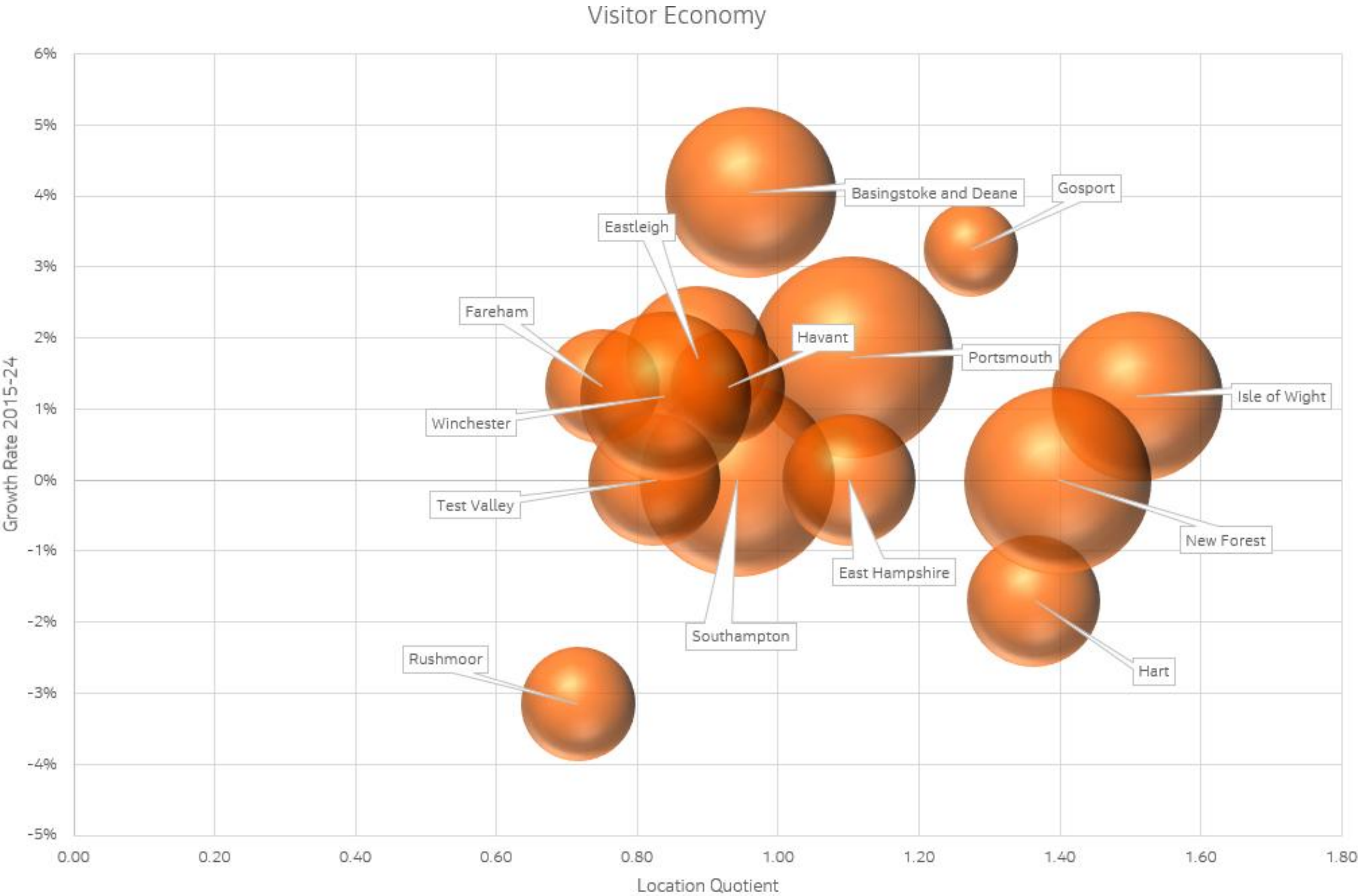
Appendix A. Key Sectors, Opportunities and Constraints

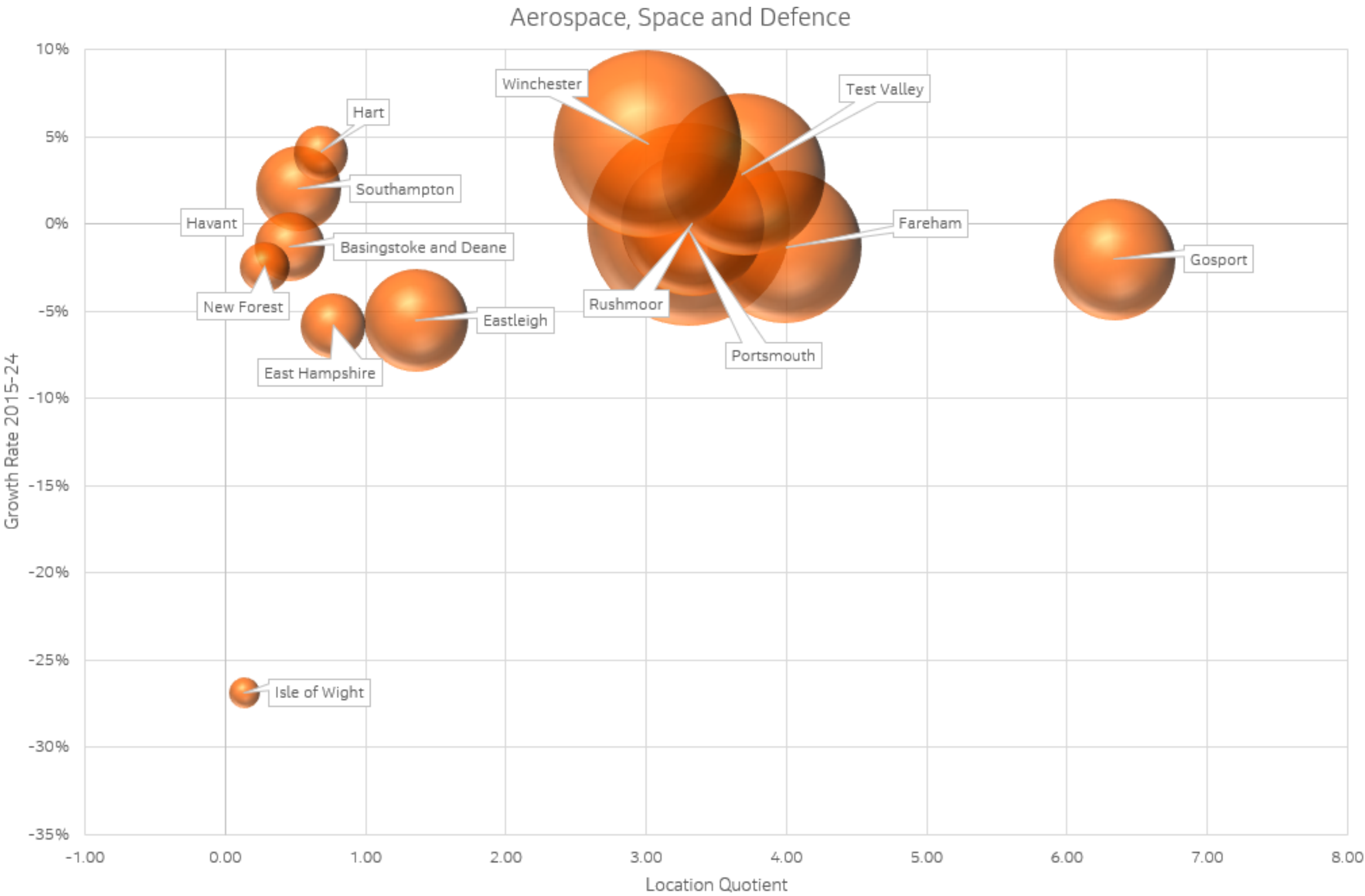
Sectors	Opportunities	Constraints
Aerospace, Space and Defence	Substantial business base: with global leading firms across the sector, including BAE Systems, Airbus, Lockheed Martin, Boeing, GE Aviation, Britten-Norman (the UK's only civil A2 approved aircraft manufacturer), Gulfstream, InSpace Missions, Ultima Forma, Satixfy, Viasat. Significant world class education/research institutions: University of Southampton, University of Portsmouth, Roke, NATS, The Centre of Excellence for Satellite Applications located within the University of Portsmouth, Defence Science and Technology Laboratory (Dstl) in Fareham and Gosport and the ADS Group in Farnborough Proximity to major assets: including Heathrow and Gatwick Airports, international ports at Southampton and Portsmouth. Large, advanced engineering supply chain: including Major MoD strategic suppliers such as Airbus, Babcock, BAE Systems, QinetiQ, and Serco Support from formal cluster organisations: including South Central Regional Defence and Security Cluster, Space South Central (largest regional space cluster in the UK), Maritime UK Solent, and the Farnborough Aerospace Consortium, Jet Zero cluster, Farnborough International Airshow. Positive trajectory for across industries: • Space: leveraging the satellite manufacturing and emerging launch segment. • Defence: rising global military spending, resulting in anticipated requirement for 3 million sq m of additional floorspace in the UK over the next 7 years. • Aerospace: rebound from pandemic leading to a surge in orders. Diversification opportunities across the sector, including: • Space: satellites manufacturing and launch. • Defence: drone manufacturing, robotics research and development, communications • Aerospace: sustainable aviation fuels.	Lack of productive and storage capacity: production can't keep pace with demand, whilst a lack of storage facilities to support Jet Zero (e.g. liquid hydrogen storage) impede attempts to specialise in this market. Bespoke property requirements: Specialised needs – linked to high specifications, security requirements, specialist equipment etc - acts to reduce the pool of suitable properties for many firms in this sector. Competition for suitable properties: where suitable properties do become available, there is intense competition from e-commerce/logistics firms who have the same spatial/transport requirements as firms in aerospace, space and defence. Inadequate Transport Infrastructure: Despite strong links in some areas, there is a lack of cohesive transport infrastructure across Hampshire and the Solent (e.g. weak commuting links between Portsmouth and Southampton) Other Factors: - supply chain fragility - workforce/skills shortages - access to finance - reduced EU programme involvement
Creative Industries	Existing specialisation in sub-sectors of the creative industry: for example, 10% of the UK's game development workforce located in the Guildford and Aldershot travel to work area Dynamic labour market: growing demand for creative and cultural talent, with Guildford, Rushmoor, and Basingstoke and Deane seeing the highest demand for jobs.	Shortage of affordable and appropriate workspace: limited provision of suitable accommodation for micro businesses and start-ups, as well as a lack of flexible spaces to support complementary activities. Lack of a central hub: the maker/craft community is considered to be disparate with no physical location to support collaboration.
Digital & Technologies	Presence of major national and international firms: including IBM, Arqiva, Fujitsu, Sony, Starling Bank, Ordnance Survey, and Garmin Existing niche in specialist sub-sectors: including artificial intelligence, cyber security, unmanned systems, electromagnetic intelligence, software; Support from local research institutions: including University of Portsmouth's Centre for Creative and Immersive eXtended Reality (CCIXR) and Solent University, which is launching a new partnership with global creative technology company Adobe to become an Adobe Creative Campus, Rapid growth: Nesta recognises the digital and creative economies in Portsmouth and Southampton to be among the 15 fastest growing clusters for job growth in the UK.	Skills shortages: mirroring national trends, there are high numbers of vacancies in the tech industry. High per capita costs in rural areas: sparsely populated rural locations results in higher costs to deliver high quality digital infrastructure and resulting digital blackspots.
Life Sciences	Presence of nationally significant research hubs: including the UK's pioneering medical institutions including the Centre for Cancer Immunology (the UK's first centre dedicated to cancer immunology research), the Centre for Healthcare Modelling and Informatics, Southampton Science Park and the National Biofilms Innovation Centre. Substantial business base: Hampshire and the Solent is already home to major players in the life science sector. Major global companies including Eli Lilly, Thermo Fisher Scientific, Cytiva, Genus, Acumed and TMC Pharma Support from formal cluster organisations: including the Life Sciences South Innovation Cluster	High rural business concentration: with 44% of life sciences firms' located in rural areas, the connectivity and transport challenges associated with rural Hampshire are acutely felt in this sector. Lack of suitable accommodation: inadequate supply of high quality and available space for both start-ups and established businesses

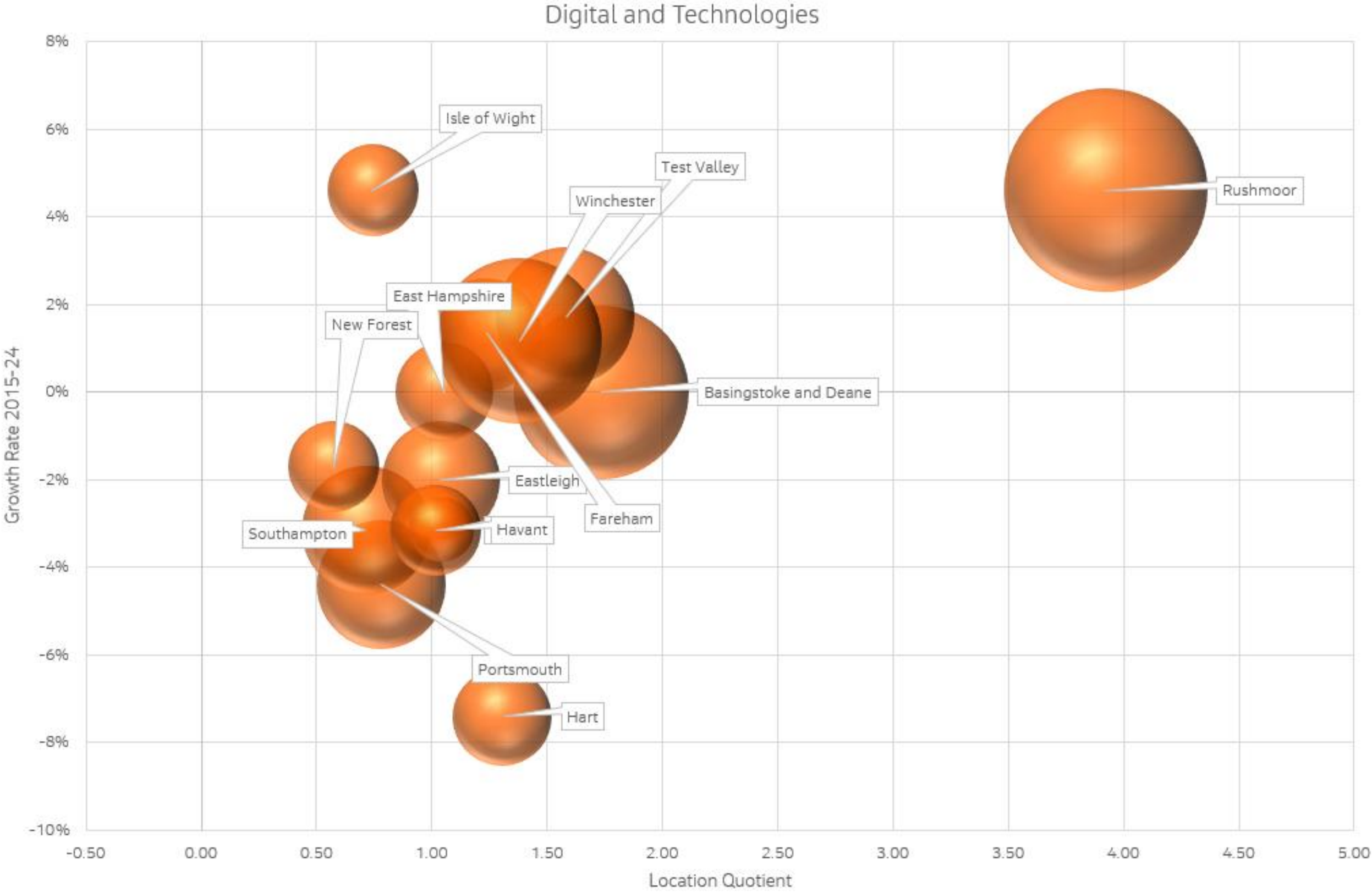
Marine & Maritime (and Logistics)	Existing infrastructure assets of national and international significance: including Portsmouth and Southampton ports. Freeport status: The Solent Freeport designation allows various strategic sites in the sub-region to benefit from a generous package of tax-related and other incentives to boost attractiveness and investment. Presence of nationally significant research hubs: The National Oceanography Centre in Southampton is a world-leading research institution in large scale oceanography and ocean measurement technology innovation. The University of Southampton, University of Portsmouth and Solent University are all specialist marine capabilities Support from formal cluster organisations: home to innovation hub Maritime UK Solent Rapid growth anticipated: projected annual growth rate of 7.5% by 2030.	Infrastructure and connectivity: road and rail links to major ports are considered to be operating at capacity with significant congestion issues at peak times. Labour and skills shortages Lack of suitable accommodation: much of the available industrial and logistics stock is poor quality and near to end-of-life. This is unattractive to potential occupiers.
Professional Business Services	Geographical proximity to London: allows Hampshire and the Solent to support an impressive presence of global HQs, disruptive SMEs, and challengers. Aviva, Lloyds Banking Group, BMW, Quilter, Zurich, Simply Health, Starling Bank, and Ageas Insurance have their HQs in the county. Rapid growth of key sub-sectors: Hampshire and the Solent is well-placed to leverage the 70% growth of the FinTech sector since 2015, being one of the highest performing sub-regions of the South East.	Poor quality of office accommodation: availability of only poor-standard, outdated office space has led some firms to relocate to business parks outside city centres.
Visitor Economy	Geographical Features: blend of historic cities, attractive coastlines, maritime heritage and vibrant culture. Historical/Heritage Features: including Winchester Cathedral, Portsmouth Historic Dockyard, Beaulieu National Motor Museum. Outstanding Natural Capital: including New Forest National Park, South Downs National Park. Major International Events: including Farnborough International Airshow which drive trade visitors and the wider visitor economy	Inadequate tourism infrastructure: covering accommodation and transport Poor rural connectivity: makes travel into the Central Belt, and key locations like Winchester, difficult in the absence of a car. Weak business and conference sector: lack of large venue and high-quality accommodation undermines attempts to expand into this sector.

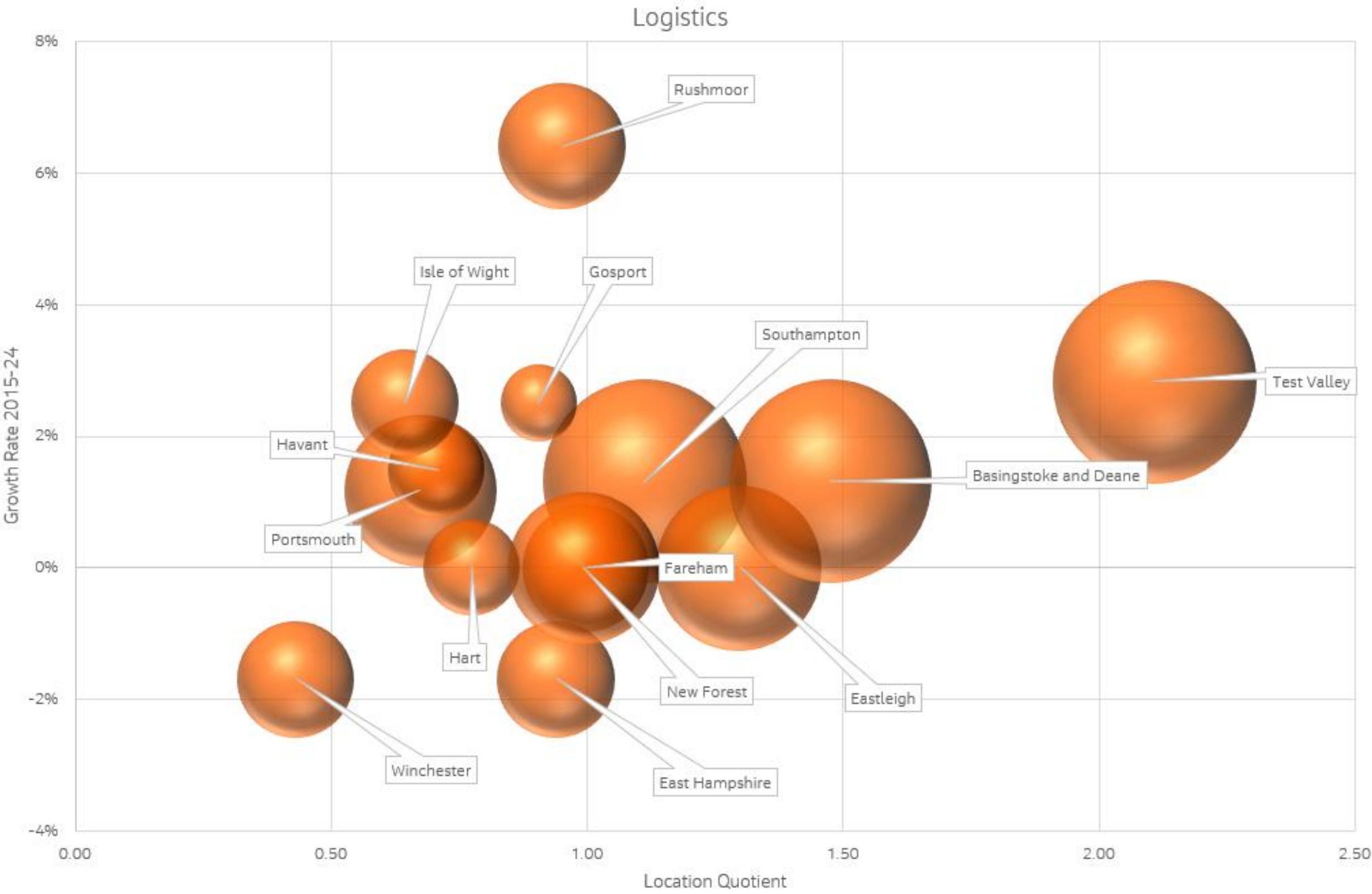
Appendix B. Sector Concentration Graphs – Employment

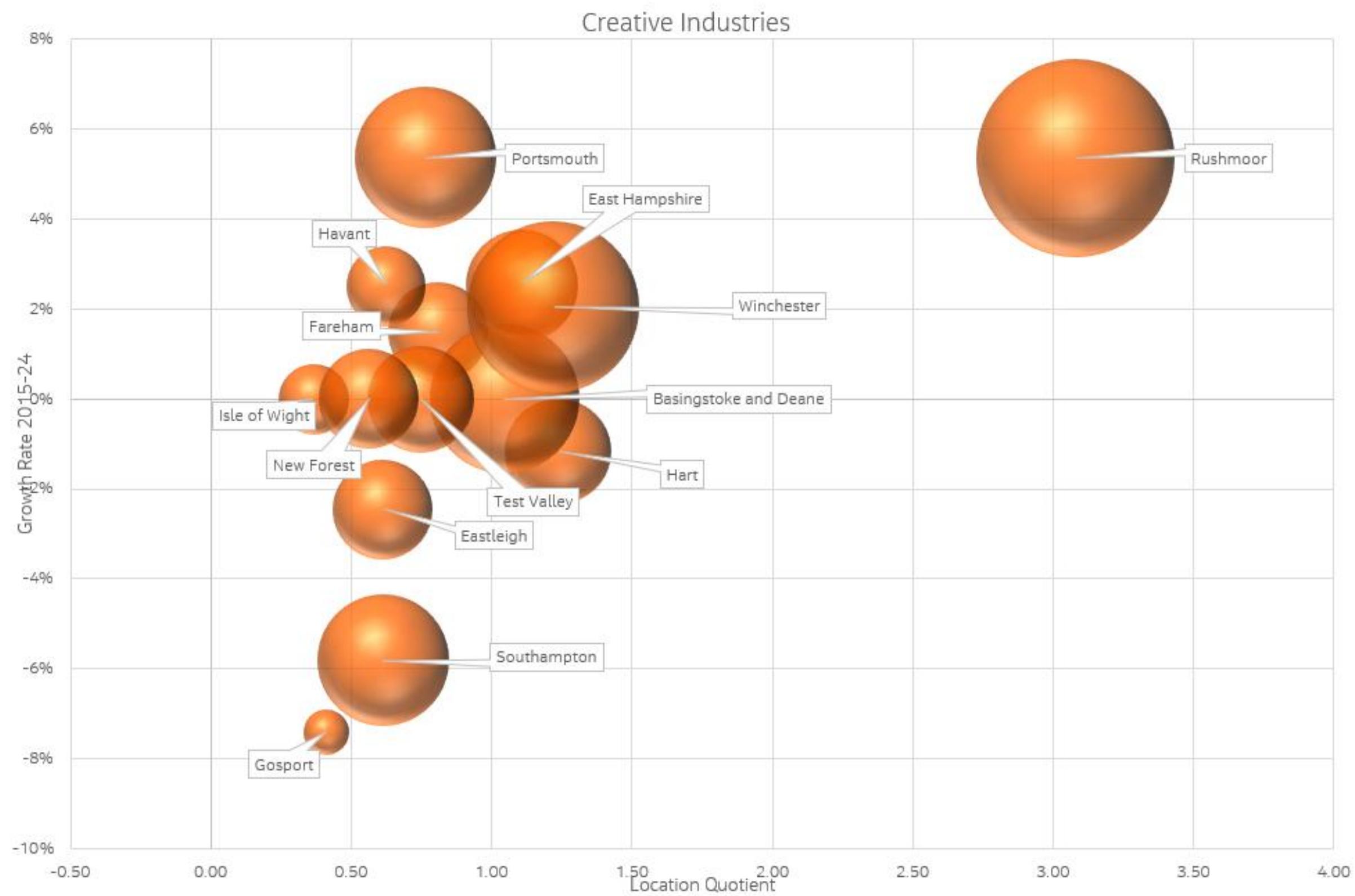
Employment-based Sector Concentrations for the 8 key sectors. Source: ONS Business Register and Employment Survey, 2024 (NB: Bubble sizes indicate scale of employment in each local authority)

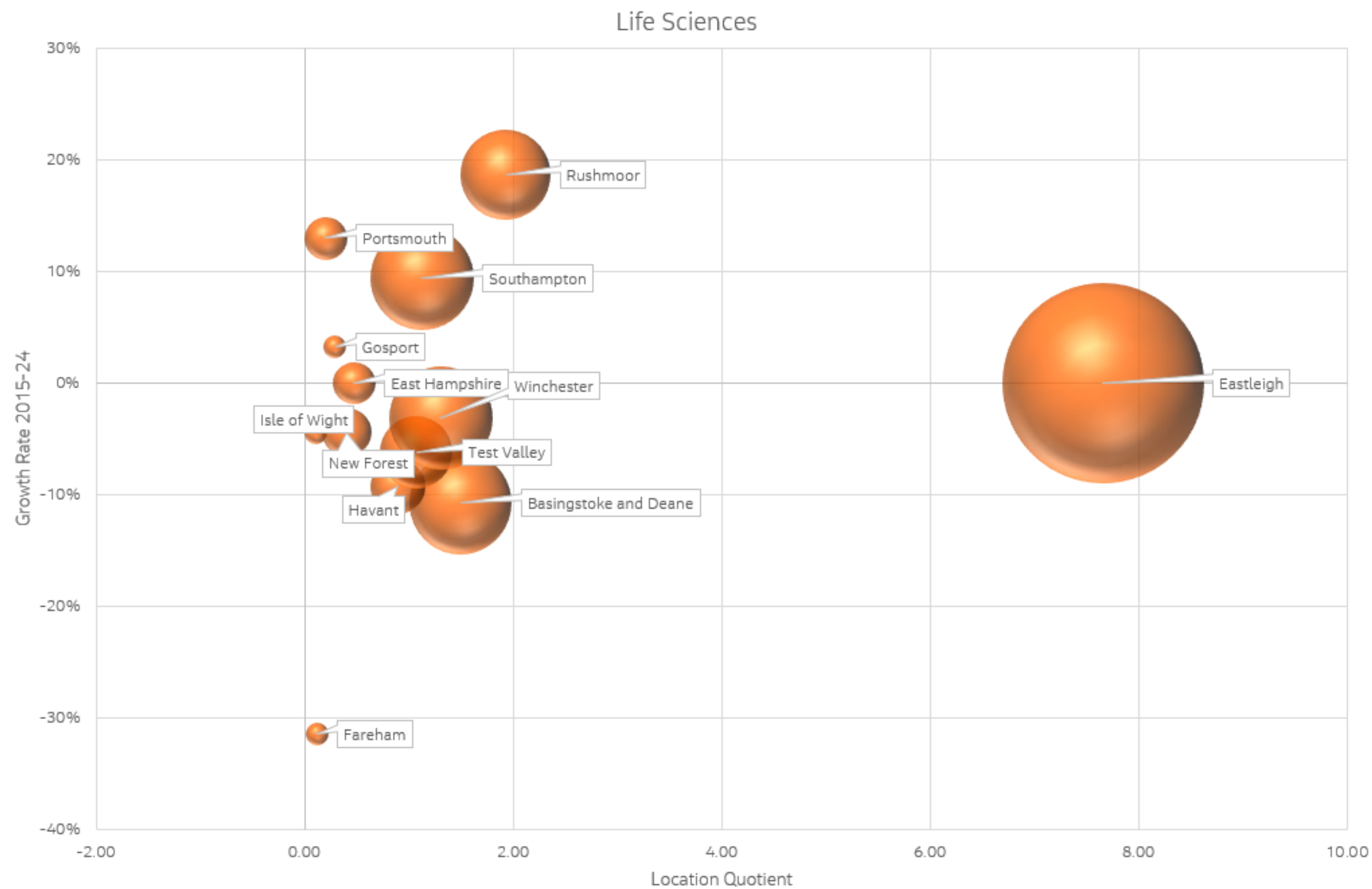


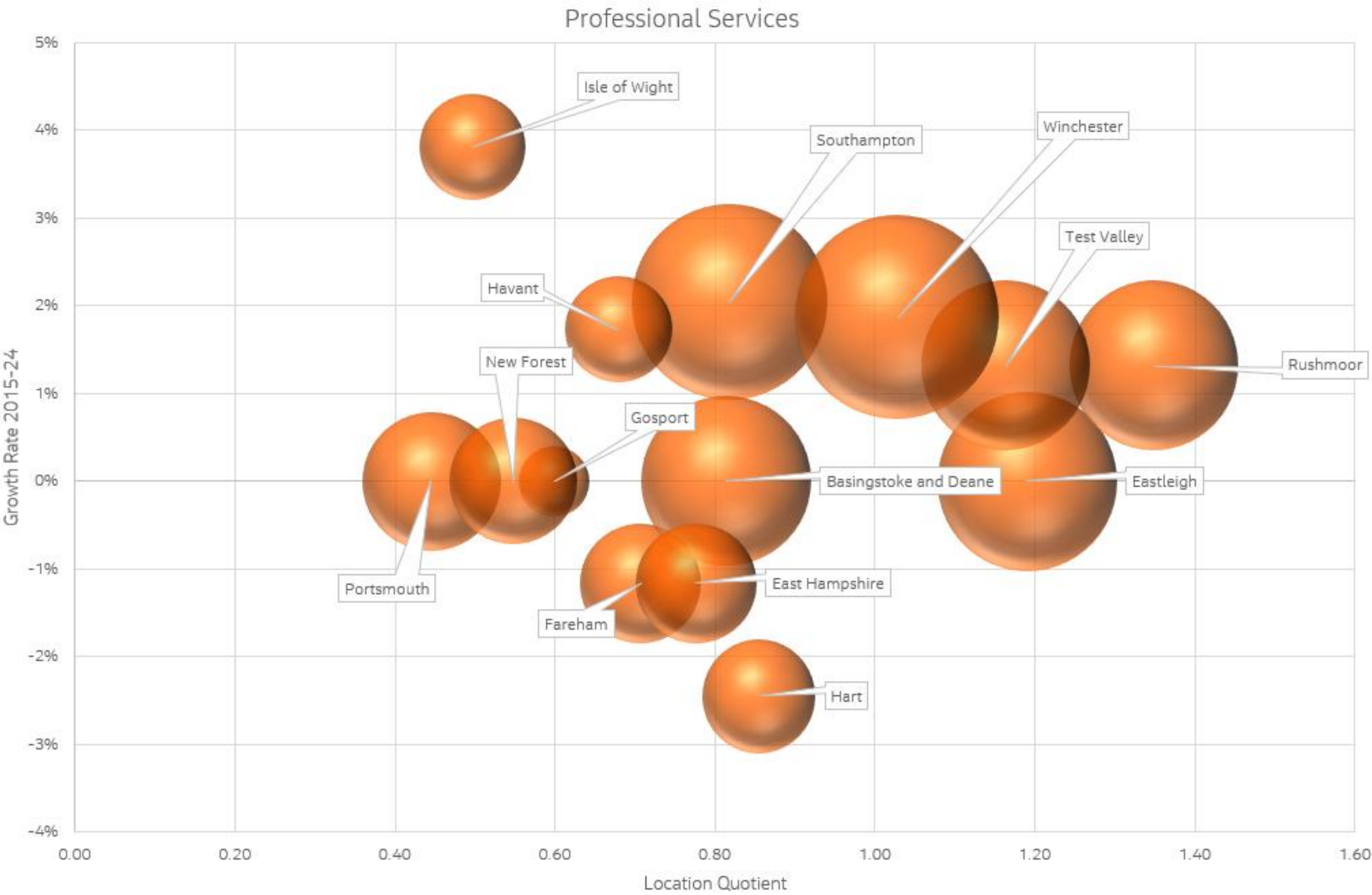


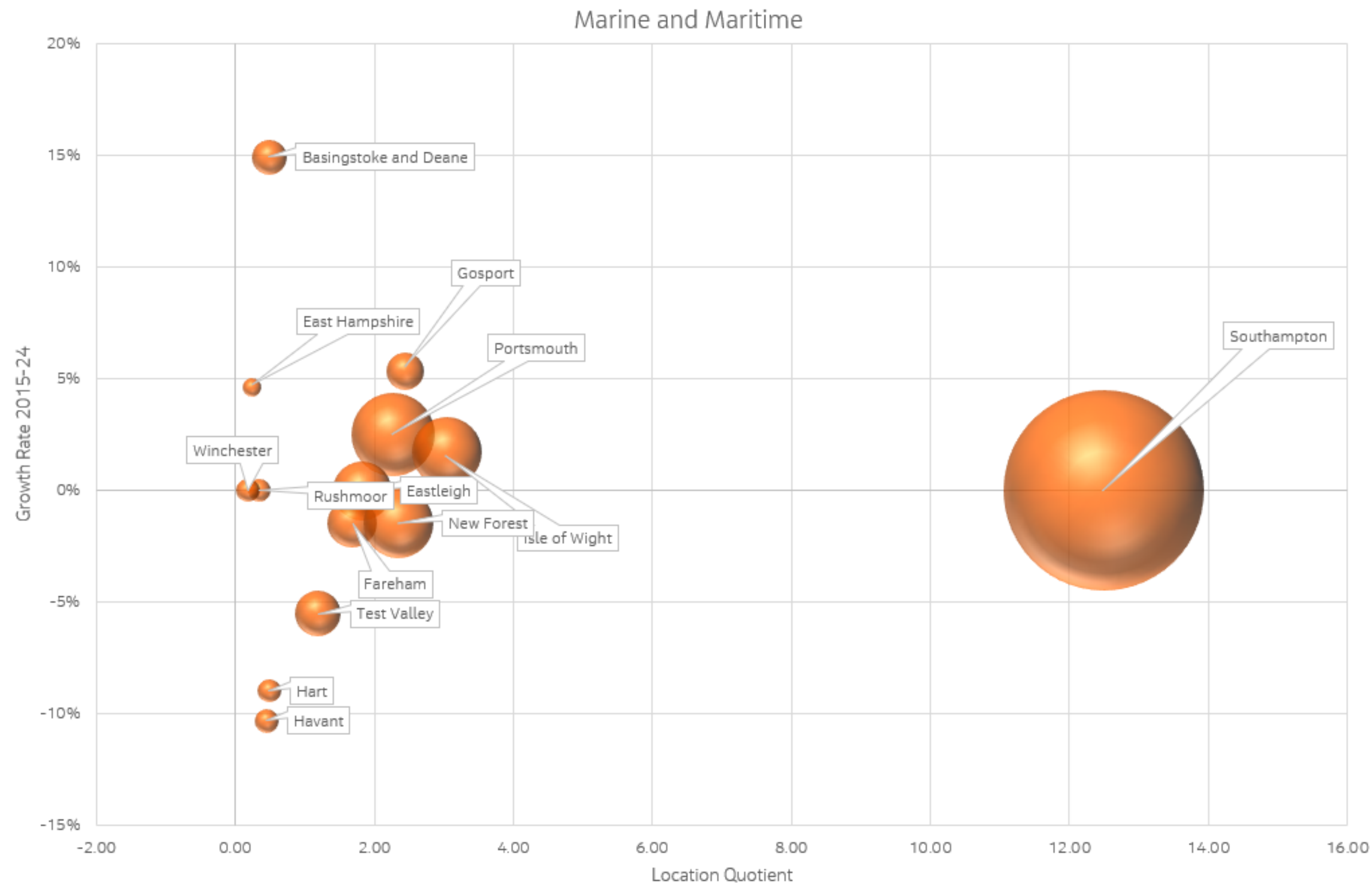






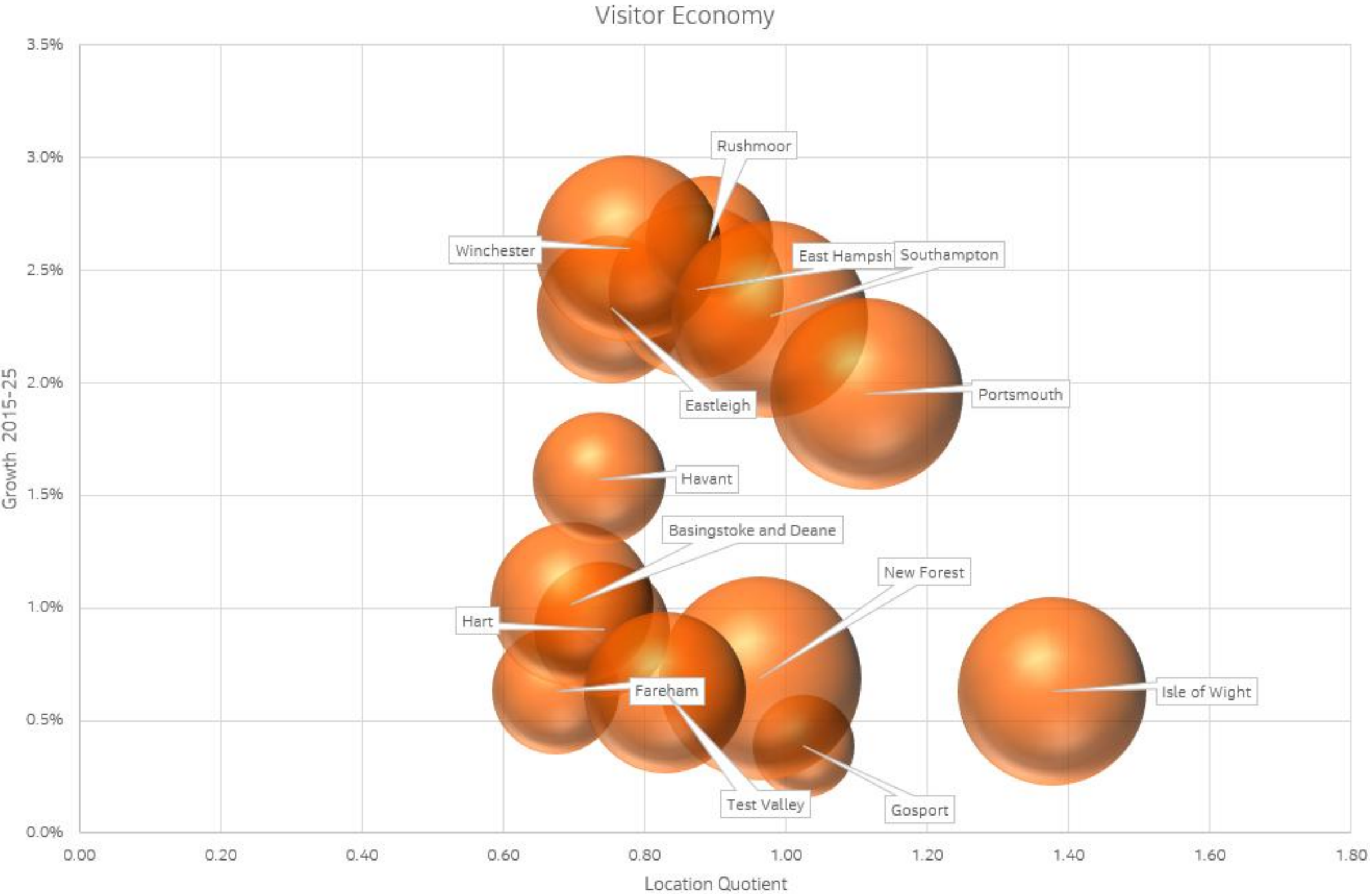


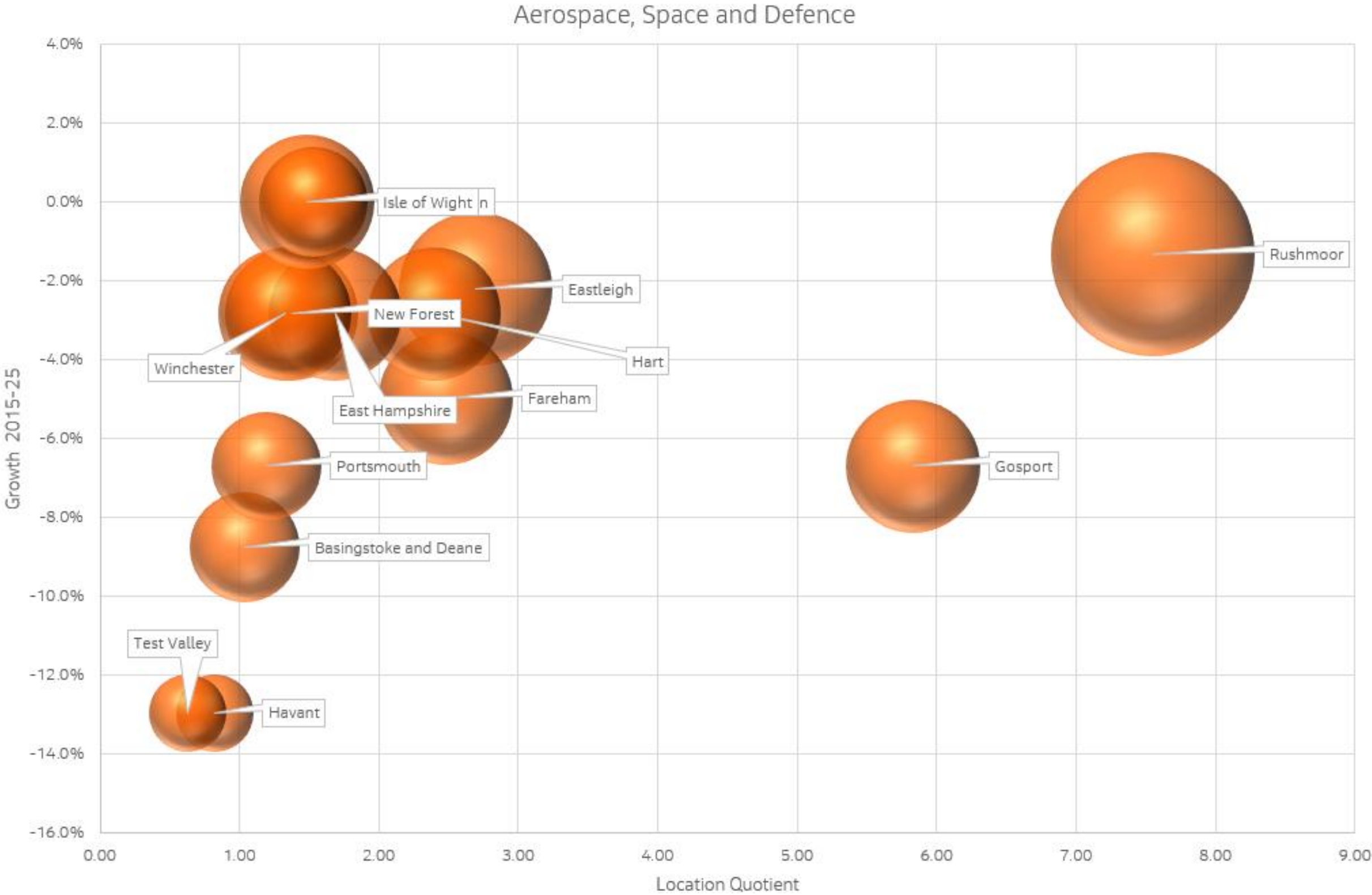


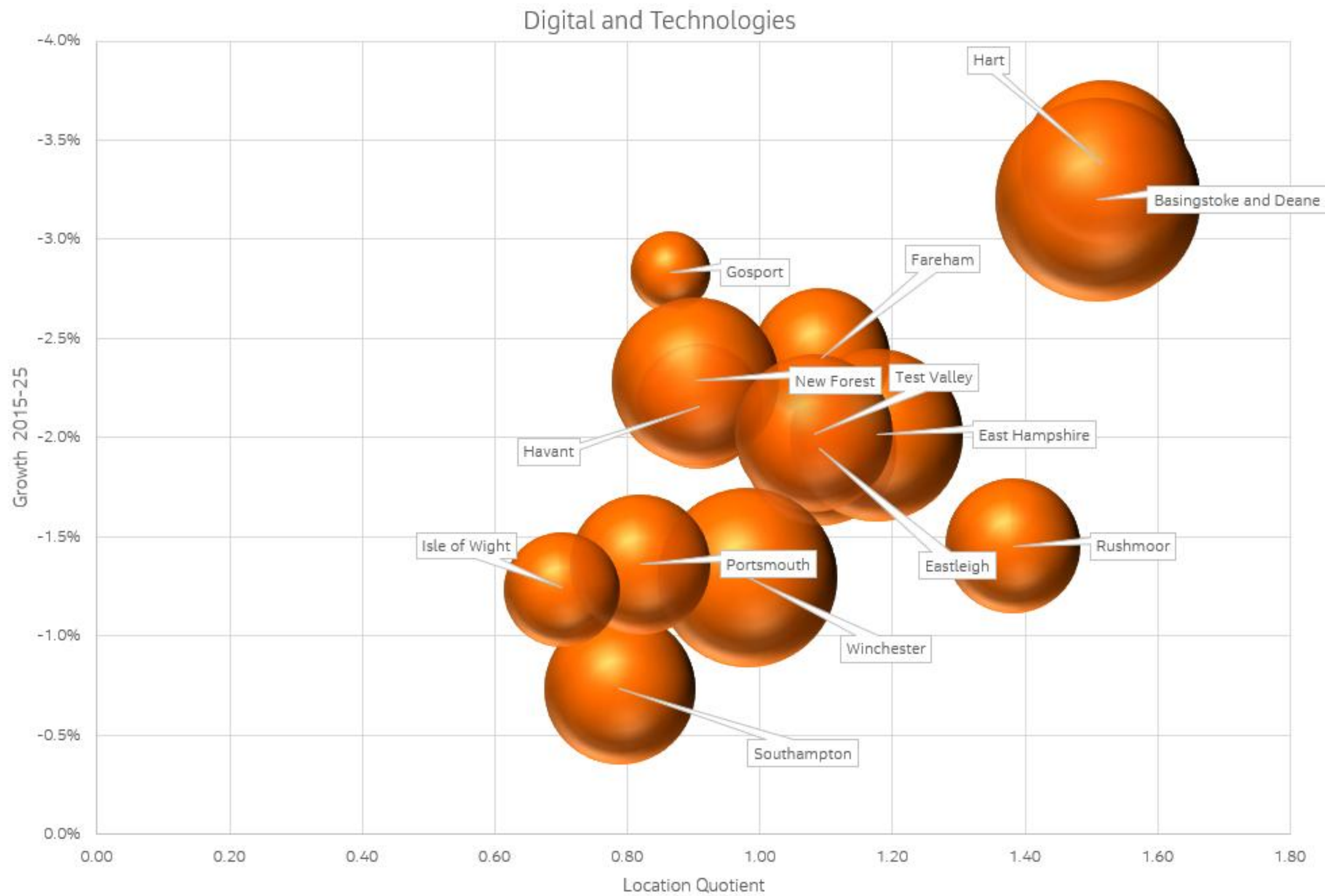


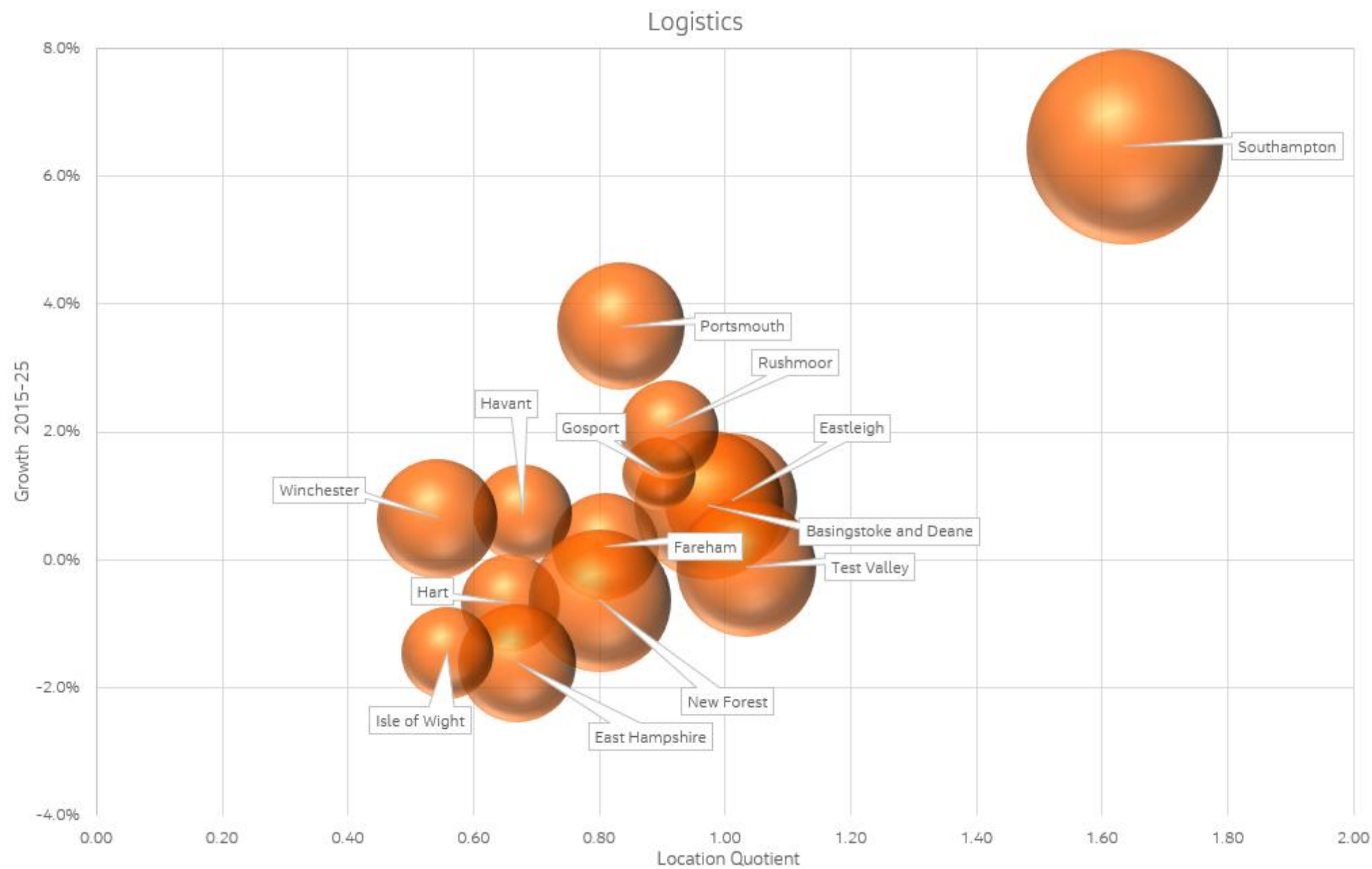
Appendix C. Sector Concentration Graphs – Business

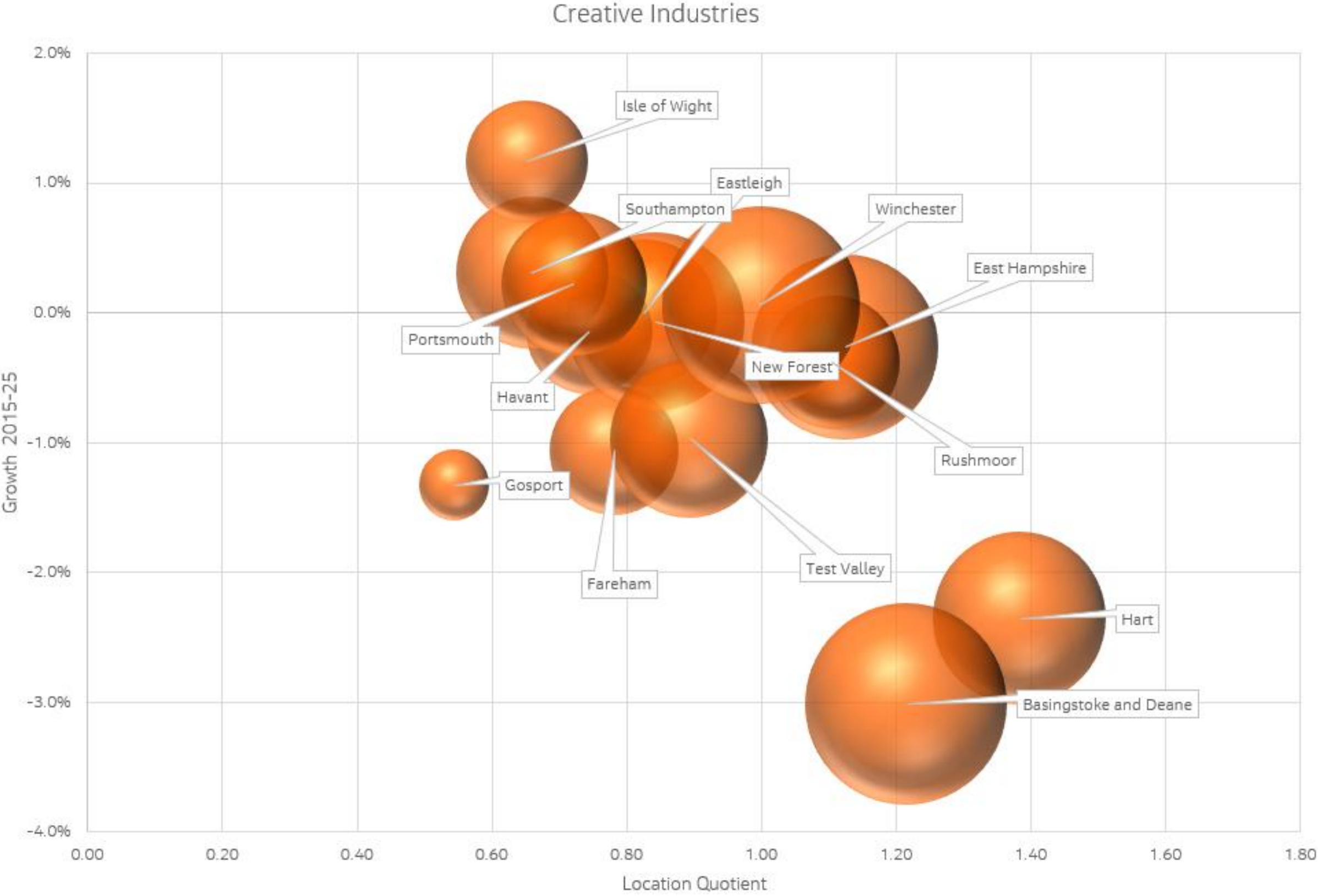
Business-based Sector Concentrations for the 8 key sectors. Source: ONS UK Business Counts Data, 2025 (NB: Bubble sizes indicate number of businesses in each local authority)

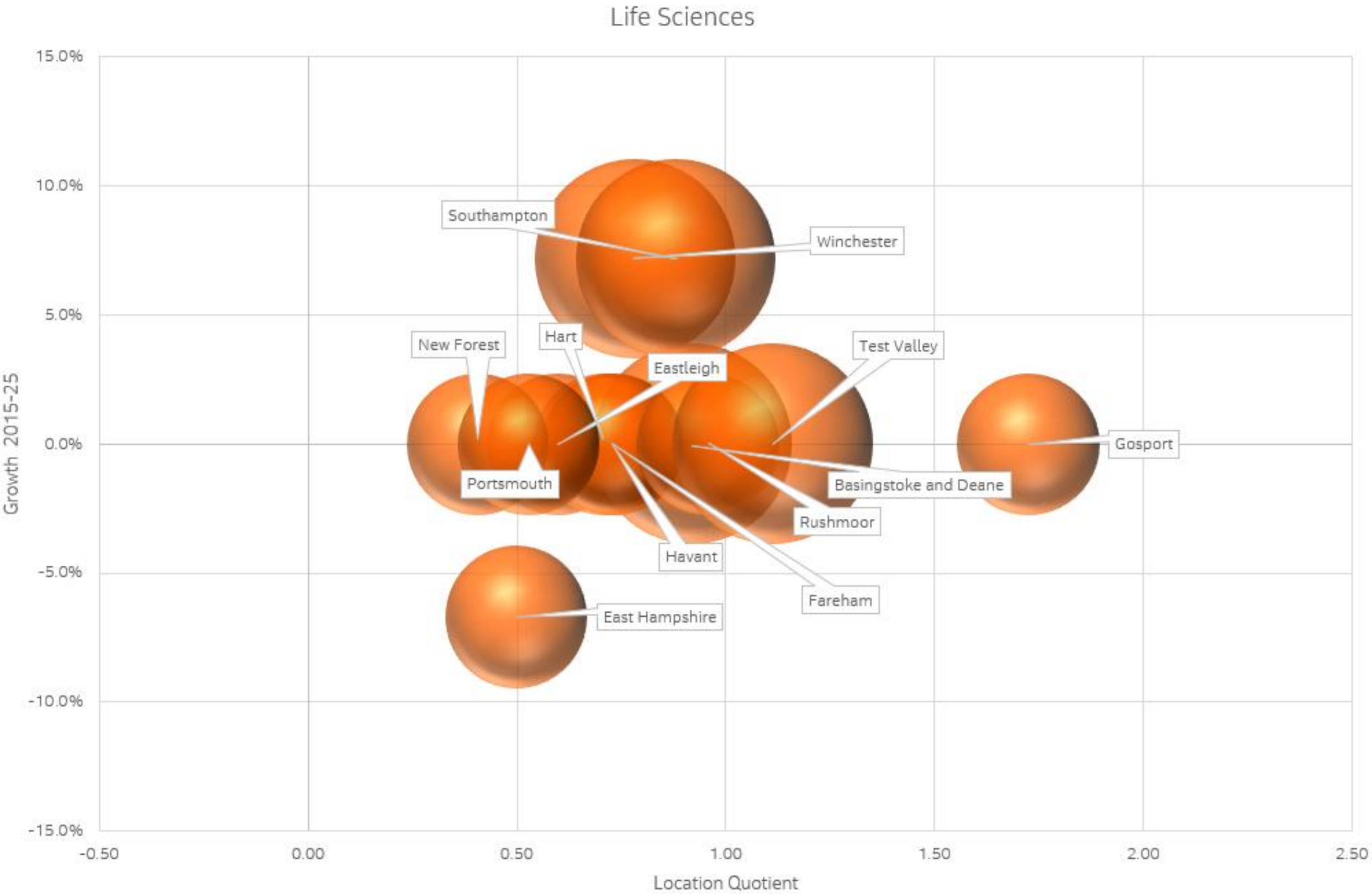


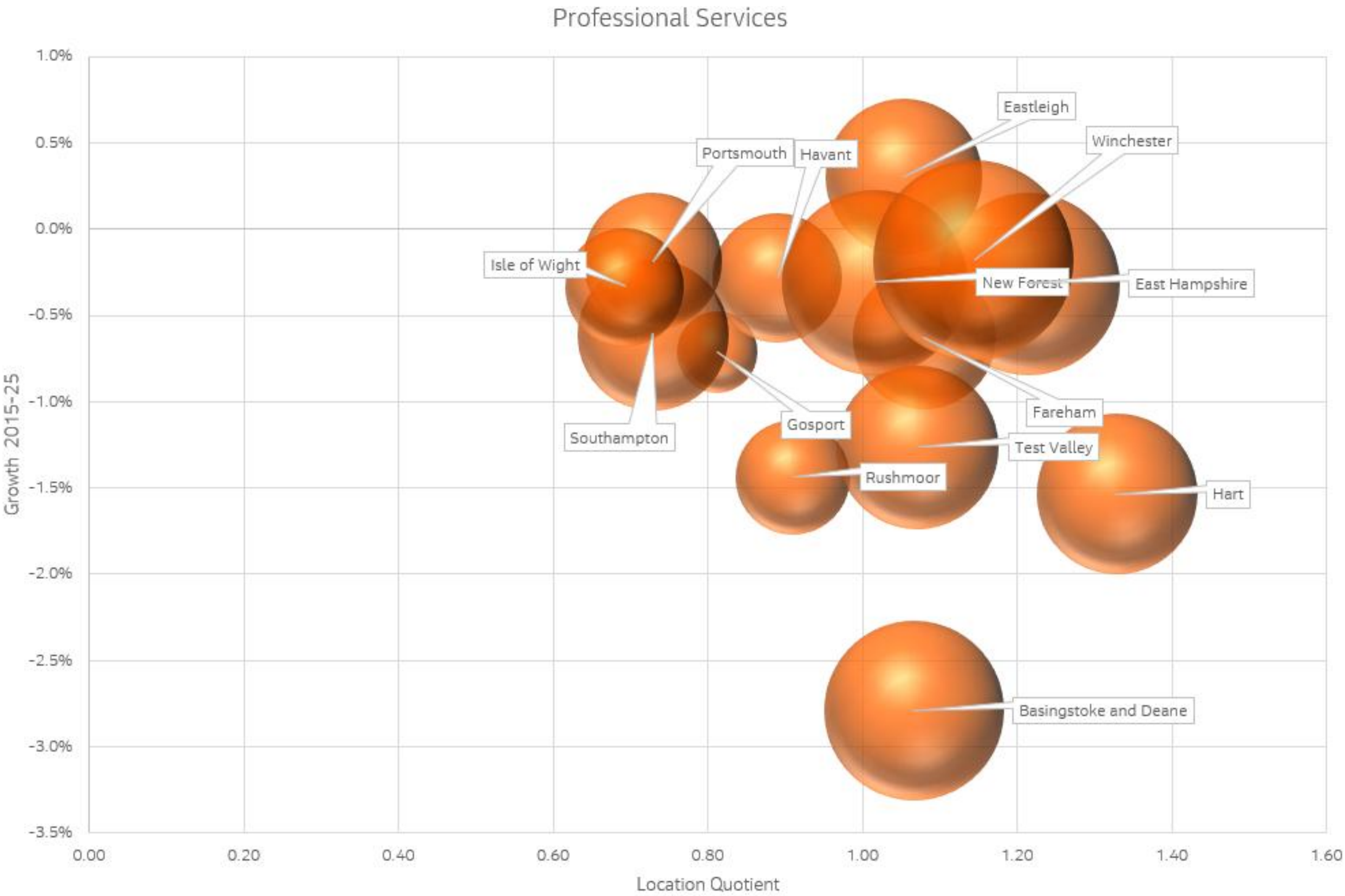


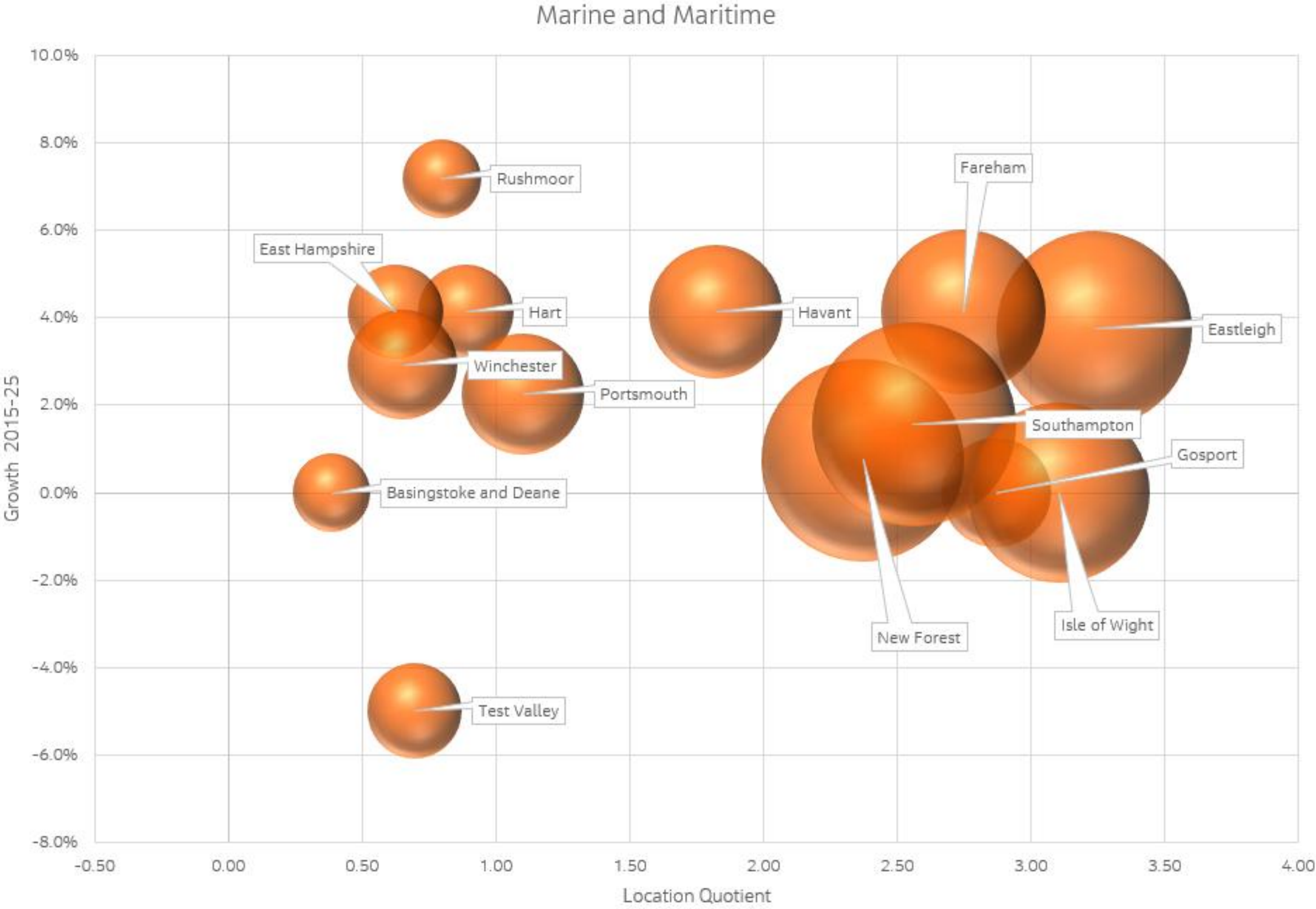












Appendix D. Real Estate Dynamics by Location

Local Authority	Evidence		Source
Basingstoke and Deane	Office	Occupiers require, and developers are providing, high quality space, but in small unit sizes. Scope remains within the existing stock to continue absorbing some of the forecast future office-based job growth. There is opportunity to better use existing office floorspace which is currently underutilised. However, this will require substantial refurbishment investment.	Basingstoke and Deane Economic Needs Assessment – 2023 update
	Industrial	Market indicators point to a tight industrial property market with new space rapidly taken-up. The demand for logistics/distribution space is strong however, supply is tight. There is demand from regional operators but a lack of allocated sites.	Emerging Local Plan
Havant	Office:	The majority of the borough's office stock is found in Waterlooville's out of town office parks. The office stock is dated and lower quality, but generally meets local needs and has consistently held low vacancy rates (currently circa 8%). The borough's office market is small (in terms of stock and take-up), and lacks the scale and quality of space to meet corporate occupier requirements, with those demands generally satisfied in nearby Southampton and Portsmouth.	Havant Borough Employment Land Review
	Industrial:	The borough's industrial stock is generally secondary space. The industrial market is strong with low levels of availability.	
Southampton	Office:	Existing trends indicate there is more efficient use of existing office space. However, new office development is not being developed speculatively. Further loss of older space is still anticipated.	Southampton City Vision Options Consultation Draft
	Industrial:	The city has a wide range of established industrial sites which continue to meet the needs of businesses. These sites have the scope to be upgraded to provide modern business accommodation, a trend that has already gained some momentum. Two strategically important sites have been developed in recent years for modern industrial / distribution use: Mountpark (former Ford site) and Test Lane South sites	
Rushmoor/Hart	Office:	The area has a significantly higher proportion of office floorspace when compared to other competing economic centres. Compared to some locations in Hampshire, there is a good supply of floorspace available for occupation. Modern Grade A stock in prominent, accessible business park environments is in strong demand. However, there is a large supply of lower grade stock for which there is limited demand, resulting in ongoing vacancy for prolonged periods.	Hart, Rushmoor and Surrey Heath Joint Employment Land Review Update
	Industrial:	Constrained supply of industrial space, particularly when compared to office supply. There is evidence of demand for medium size premises (i.e. 50,000 sq ft to 100,000 sq ft) close to the strategic road network for both industrial and warehousing activities.	
Test Valley	Office:	Demand for office space is significantly lower than other employment floorspace types. Where demand does exist, it is focused around town centre locations with good transport links. Office space that is high quality (Grade A) and offers flexible working arrangements to meet the evolving needs of businesses is in higher demand.	Draft Test Valley Local Plan 2040
	Industrial:	Demand is driven by a combination of (i) the regional, national and international warehousing market, requiring strategic warehousing in the range of large-scale logistics floorspace (i.e. 40,000sqm – 100,000sqm+); and (ii) local and sub-regional demand for small and medium sized industrial units that average around 2,500 sq m.	
East Hampshire	Office / Industrial:	There is a limited amount of vacant employment floorspace across East Hampshire. Recognising that the majority of businesses are small to medium enterprises (SMEs), it is important that floorspace, appropriate for start-up and follow-on business, is provided to support the establishment and growth of these businesses. There is a need to encourage the redevelopment of dated employment floorspace to provide modern floorspace and attractive facilities.	Our Local Plan 2021-2040 (Draft)
Winchester	Office:	There is significant pressure for the conversion of land for employment use (particularly office) to residential use due to high land values and the attractiveness of the district as a location and a place to live. As a result, it is critical to ensure that existing spaces are adequately protected to support the economy of the Winchester district.	Your Place Your Plan Winchester District Local Plan (2020-40)
Eastleigh	General:	Take-up in the region, over the past three years, has been at around the 450,000 sq ft, with ongoing availability below the national average. This creates potential supply issues in the short-term.	Eastleigh Borough Local Plan (2016-2036)
	Office:	There is an acute need for development opportunities for new employers and existing enterprises wishing to expand. There is a significant trend for the conversion of office spaces to residential use, with approximately 200,000 sq m of employment floorspace lost to other uses in recent years. Recent demonstrable growth in take-up of grade A offices.	Adopted April 2022 Eastleigh Employment Land Study Report 2016
	Industrial:	Key employment sites (e.g. Eastleigh River Side) are home to aging commercial properties. Combined with the large area of railway sidings adjoining this area, this creates a poor environment on the east side of the town centre and the important southern approach to the town.	
New Forest	Office:	Efforts are ongoing to encourage demand from, and a greater presence of, higher value, knowledge-based businesses.	New Forest District Local Plan 2016-2036 Part 1: Planning Strategy
	Industrial:	Demand is primarily driven by the Solent marine industries sector.	

Local Authority	Evidence		Source
Fareham	Industrial:	Recent trends in industrial growth show an increase in demand for smaller warehouses and logistics services including last mile delivery. The two strategic sites being developed at Welborne and Daedalus will provide high quality, attractive employment floorspace.	Fareham Local Plan 2037
Gosport	Office:	There is limited office supply in the borough - the proportion of office space in Gosport is significantly lower than averages for Hampshire, and England and Wales (6.8% of total employment floorspace in borough). Gosport Waterfront has the potential to support demand from the marine sector with small-scale office and workshop development in both the Town Centre and Waterfront areas.	Gosport Borough Local Plan 2038 Consultation Draft (Regulation 18) September 2021
Portsmouth	Office:	Portsmouth City Centre has struggled to maintain office floorspace due to conversions of stock to other uses such as student housing. However, occupancy rates reach up to 95%, demonstrating low levels of vacancy	Pre-Submission Portsmouth Local Plan
	Industrial:	There is a tightening supply of industrial space. However, there is an occupancy rate of 93% indicating a high performing market. The Naval Base generates a significant supply chain requirement in the marine and maritime engineering sectors with an estimated 1,200 companies supplying the base, housed in a range of contemporary and dated industrial, warehousing and office accommodation. Key locations for future development include Tipner West & Horsea Island East. Proposals include a marine hub with a working quayside and up to 58,000 m ² of marine employment floorspace (class E(g) offices, research and development, light industrial, B2 general industrial and B8 storage or distribution)	Portsmouth City Employment Land Forecasting 2020
Isle of Wight	Office:	The Island has a small but growing office market, creating potential supply issues. There is strong demand for low to middle grade stock but limited demand for high grade stock suggesting new stock should be built to basic specifications.	Isle of Wight Employment Land Study 2022
	Industrial:	Current under-supply of industrial floorspace, particularly logistics.	

Appendix E. Strategic Sites - Major Development Opportunities

Site	Location	Designation	Area Size	Development Scale	Delivery Status	Planning Status	Target Sectors	Opportunities	Constraints/Infrastructure Challenges
Dunsbury Park	Havant	Freeport tax site	43 ha	665,000 sq ft allocated for manufacturing, industrial, distribution and office space	Part-built	Approved planning permission 665,000 sq ft manufacturing, industrial, distribution and office space	Manufacturing, industrial, distribution and office space	Adjacent to A3(M) The whole site is served by a link road, superfast broadband and 9MVA power. Business rates relief for five years, 100 per cent capital allowance on plant and machinery, no stamp duty tax on leases and relief from employers National Insurance for three years. Simplified planning	National Highways concerned about potential increase in traffic as a result of planned growth in the region, putting strain on SRN. A27 and A3(M) form SRN in Havant. Region also suffers from congestion and capacity constraints. Viability cost of speculative development means it is hard to attract tenants. Improving sustainable travel (walking, cycling, bus) to Dunsbury Park, especially from Leigh Park and Waterlooville
Tech Forest	East Hampshire	Enterprise zone	8 ha	Offering commercial spaces from 5,000 up to 50,000 sq ft	Part-built	Potential for further development.	Thriving hub for enterprise, especially for SMEs. BASE Bordon Innovation Centre based in EZ hosts diverse range of businesses (small and medium) in sectors including creative, mortgage brokers and employment law.	Conveniently accessible from A3.	Minimal utilities in eastern part of site. Active travel infrastructure improvements necessary to tie into green loop. Local flood schemes necessary to minimise risk of surface water flooding at western end of site.
Central Station Hub/ Mayflower Quarter	Southampton	No specific designations. Major urban brownfield development opportunity.	84 ha	Up to 1.2m sq m GEA, including: - 6,000 dwellings (584k sq m) - 265k sq m of business/commercial - 90k sq m of hotel - 57k sq m of leisure/culture - 24k sq m of retail/F&B	Not started	Planning Stage	Ambition to become regional destination for office-based employment as well as culture and arts development Sector Typology: - Strategic Sectors (professional business services, visitor economy) - Potential Growth and Opportunity Sectors (creative industries)	Good core transport links, with railway station and potential for integrating buses into a hub. The City Cruise Terminal in Southampton Port is adjacent to the site. Adjacent to a regionally significant city centre, historic and retail core.	Significant infrastructure essential for success of scheme. This includes a strategic flood defence, connections to central station and shopping area. Major transformational infrastructure also required including a green bridge connecting Mayflower park and Portland Link Major early infrastructure/public realm requirements - funded by Public Sector - to attract private sector funding to undertake development include: 1. Upgrade works to Western Esplanade to create more pedestrian-focused street character; 2. Improved station interchange around the southern exit of the railway station; 3. Portland Link accessible connection between Portland Terrace and Pirelli St/part Western Esplanade; 4. Initial works to Mayflower Circus and West Quay linear Park on the LeisureWorld site; 5. Initial section of enhanced Maritime Boulevard delivered within former Toys 'R' Us site. Elements (e.g. Maritime Quarter) haven't come forward due to viability.
Centenary Quay Marine Employment Quarter	Southampton	No specific designations	3.49 ha	1,600 homes (largely complete) Cafes, bars, shops c. 5,000 sqm of industrial/marine engineering and R&D facilities	Not started	Residential elements largely complete Outline planning permission approved for employment uses	Retail, leisure and mixed employment uses linked to marine industries. Sector Typology: - Key Specialist Sectors (marine and maritime)	Waterfront location to support marine/maritime businesses, alongside residential and leisure/hospitality. Some infrastructure improvements already provided as part of housing delivery. Linkages to existing district centres (e.g. Woolston)	Public realm improvements to Woolston (linked to Centenary Quay redevelopment – alongside earlier phases) Complex site remediation
Basing View	Basingstoke and Deane	Enterprise Zone	65 acres	Master planned to provide between 35,000 sq ft and 315,000 sq ft of accommodation suitable for a range of uses.	Part-built	1 million sq ft already built and occupied. 6 sites available for mixed-use development (90,000 sq ft).	Office, Science and Innovation, MedTech, Defence and Security, Green Technologies, Advanced Manufacturing and Professional Services, F&B, Hospitality Sector Typology: - Strategic Sectors (professional business services) - Potential Growth and Opportunity Sectors (creative industries, life sciences, digital and technologies)	The office cluster at Basing View is located on edge of town centre and very well related to both the railway and bus stations. Only 45 mins by train to London and 45 min drive to Heathrow. Access to a highly skilled workforce. The business zone is currently home to more than 180 national and international businesses as well as a growing SME community and will be home to a new state-of-the-art 5G Living Lab.	Inadequate active travel access to site. Congested strategic and local highway network

Site	Location	Designation	Area Size	Development Scale	Delivery Status	Planning Status	Target Sectors	Opportunities	Constraints/Infrastructure Challenges
							- Key Specialist Sectors (aerospace, space and defence)		
Southampton Water - Redbridge	Southampton	Freeport tax site	12 ha	Bespoke facilities of up to 600,000 sq ft	Not started	Planning stage	Port-centric logistics, freight and manufacturing Sector Typology: - Key Specialist Sectors (marine and maritime)	Key strategic location: just 20 nautical miles from key international shipping lanes and under 100 nautical miles from mainland Europe. Close proximity to the M27 and M3 with connectivity to London, the Midlands and the North.	The limited capability of the land due to poor supporting infrastructure means it is underutilised. Supporting infrastructure and site remediation are required to deliver additional container port capacity
Southampton Airport (Navigator Quarter)	Southampton	Special Economic Zone within the Freeport	110 acres	92,000 sq ft	Not started	Planning stage	High quality employment space 92,000 sq m of high-quality employment space (combination of R&D/light industry and industrial/logistics) Sector Typology: - Strategic Services (logistics)	Excellent public transport accessibility A special economic zone within the Solent Freeport: the UK's most important gateway to European and global markets Connected: tri-modal links with road (adjacent to J5 M27 and M3), rail (access to Southampton Airport Parkway railway station with direct route to London Waterloo) and air (direct access to the adjacent airport)	National Highways currently trying to block or delay planning app until they are satisfied there is no material impact on the SRN. Local Flood/Drainage Authority also delaying as they require further info Poor cycling accessibility - ATE want more information before making a decision on planning Main blocker is road and servicing infrastructure to the site Wide Lane Rail Bridge acts as a constraint to HGV movements.
Southampton Water - Solent Gateway [1]	Southampton	Freeport tax and customs site	83 ha	64ha of port-centric logistics space	Part-built	Planning stage	Port-centric logistics space Sector Typology: - Key Specialist Sectors (marine and maritime)	There is a dedicated rail connection direct to berth with 10k of rail sidings, dedicated locomotives and national rail connection. Solent Gateway is also just 10 minutes from the national motorway network.	Environmentally designated site within Natural England - for development to be allowed, extensive resources are required during planning process to demonstrate the protection of integrity of the site. Poor local highway connectivity to strategic routes (e.g. A326). A326 single carriageway is experiencing existing peak period capacity issues and delays. Therefore, highway access to sites needs to be improved. Environmental sensitivity associated with proximity to New Forest National Park.
Southampton Water - Solent Gateway [2]	Southampton	Freeport tax site	100 acres	Not determined. Dedicated vehicle import / export terminal onshore, with appropriate offshore jetties provided from a marine perspective.	Not started	Planning stage	Port-centric manufacturing and green energy space Automotive terminal Sector Typology: - Key Specialist Sectors (marine and maritime) - Potential Growth and Opportunity Sectors (digital and technologies)	Adjacency to existing port infrastructure and other Solent Freeport sites. Greater capacity and support for MoD.	Poor local highway connectivity to strategic routes (e.g. A326). A326 single carriageway is experiencing existing peak period capacity issues and delays. Therefore, highway access to sites needs to be improved. Environmental sensitivity associated with proximity to New Forest National Park.
Southampton Water - ExxonMobil	Southampton	Freeport tax site	3,250 acres (existing site)	Not determined. New hydrogen plant proposed - 120MW capacity	Not started	Planning stage	Energy sector - new hydrogen plant Sector Typology: - Key Specialist Sectors (marine and maritime) - Potential Growth and Opportunity Sectors (digital and technologies)	UK's largest integrated petrochemical complex 700km fuel distribution pipeline already in place, with a direct jet fuel pipeline running to West London Terminal (Heathrow) Leading the Solent Cluster Project, aiming to capture up to 10 million tonnes of CO2 per year	Poor local highway connectivity to strategic routes (e.g. A326). A326 single carriageway is experiencing existing peak period capacity issues and delays. Therefore, highway access to sites needs to be improved. Environmental sensitivity associated with proximity to New Forest National Park.
Southampton Water - Fawley Waterside	Southampton	Freeport tax site	70 acres	360,000 sq m, with 10 acres allocated to commercial space	Not started	Planning stage	Marine innovation, port-centric manufacturing and energy Sector Typology: - Key Specialist Sectors (marine and maritime) - Potential Growth and Opportunity Sectors (digital and technologies)	Brownfield regeneration of a former power station. Dedicated dock already in place.	Poor local highway connectivity to strategic routes (e.g. A326). A326 single carriageway is experiencing existing peak period capacity issues and delays. Therefore, highway access to sites needs to be improved. Rail connectivity is constrained by capacity issues associated with Totton junction, so investment is needed.

Site	Location	Designation	Area Size	Development Scale	Delivery Status	Planning Status	Target Sectors	Opportunities	Constraints/Infrastructure Challenges
Daedalus EZ	Partnership between Fareham Borough Council, Gosport Borough Council, Hampshire County Council	Enterprise zone	200 ha overall, 82 enterprise zone area	135,000 sq ft with 65 commercial units	Part-built	Approved	Marine, aerospace and aviation Sector Typology: - Key Specialist Sectors (marine and maritime, aerospace, space and defence)	Daedalus lies approximately 70 miles and 90 minutes from London, and within easy reach of the south's principal motorways: M27, M3 and A3(M). Fareham train station lies four miles from the site with direct trains to London Waterloo and London Victoria.	Poor cycle access from some nearby neighbourhoods (e.g. Rowner. Poor public transport provision between Rowner, Daedalus and Lee-on-the-Solent. Bottlenecks on the key A27 east to west corridor as well as north south access routes to the peninsula.
Portsmouth Lakeside	Portsmouth	No specific designations	130 acres	60,000 sq m of grade A office space	Part-built	Planning consent for a further 69,000 sq m	Office-based employment Sector Typology: - Strategic Sectors (professional business services, visitor economy)	Conveniently located on J12 of the M27 - campus offers fast access to London, Portsmouth International Port and Southampton Airport.	Site access requirements for highway and active mode users. Requirement for Wastewater network reinforcement
Tipner West and Horsea Island East	Portsmouth	No specific designations	27.4 ha at Tipner West, 64ha at Horsea Island	25,000m2 of employment floorspace 1,000 residential dwellings 64ha of strategic open space	Not started	Planning stage	Mixed use, including new employment hub supporting marine/maritime sector Sector Typology: - Key Specialist Sectors (marine and maritime)	New gateway to the City. Opportunity for brownfield regeneration to vastly improve the quality of the environment in this part of Portsmouth	Flood risk at Tipner West site. Lack of access between Tipner West and Horsea Island. Site remediation and relocation of existing assets (e.g. Harbour School's Bay Campus). Requirement for reinforcement of gas network and wastewater network infrastructure Substandard public transport access.
Portsmouth International Port	Portsmouth	Freeport customs site	66 acres	Not defined. Ambitions include a brand new terminal extension	Not started	Planning stage	Varied cargo handling - including project cargo, dry bulk and break bulk loads Sector Typology: - Key Specialist Sectors (marine and maritime)	Tariff-free movement of goods UK's best connected and second busiest ferry port, with a dedicated motorway junction, close to the main shipping channels and deep-water access.	Flood risk at the Continental Ferry Port. Site access requirements for highway and active mode users. Requirement for enhanced rail freight connections.

Appendix F. Travel to Work Patterns

Mode of transport used to travel to work. Source: 2021 census

Mode of travel to work (2021)	Hampshire	Southampton	Portsmouth	Isle of Wight	National
Work mainly at or from home	35%	26%	25%	22%	31%
Underground, metro, light rail, tram	0%	0%	0%	0%	2%
Train	1%	1%	2%	0%	2%
Bus, minibus or coach	2%	7%	5%	4%	4%
Taxi	0%	1%	1%	0%	1%
Motorcycle, scooter or moped	1%	1%	1%	1%	1%
Driving a car or van	49%	44%	42%	51%	45%
Passenger in a car or van	4%	5%	5%	4%	4%
Bicycle	2%	3%	5%	2%	2%
On foot	6%	12%	13%	13%	8%
Other method of travel to work	1%	1%	1%	2%	1%

The data above is taken from the 2021 census which was undertaken during COVID lockdowns so patterns have changed somewhat – current ONS stats suggest only 14% of workers nationally are now homeworking only, with 28% using hybrid working patterns, and hence commuting to the office part of the week. Given their more rural characteristics, commuting by car in Hampshire and the Isle of Wight is higher than the national average, while slightly less than national average in the urban locations of Southampton and Portsmouth. Commuting by bicycle is higher than the national average in Southampton and Portsmouth, largely due to the higher density. Commuting by bus is lower than the national average in Hampshire, with Southampton and Portsmouth both higher than national average, being better served urban areas.

Distance travelled to work. Source: 2021 census.

Distance Travelled to work (2021)	Hampshire	Southampton	Portsmouth	Isle of Wight	National
Less than 2km	20%	27%	29%	29%	20%
2km to less than 5km	20%	32%	30%	16%	23%
5km to less than 10km	22%	21%	20%	25%	22%
10km to less than 20km	20%	9%	8%	24%	19%
20km to less than 30km	9%	3%	7%	2%	7%
30km to less than 40km	4%	2%	2%	1%	3%
40km to less than 60km	3%	2%	1%	1%	2%
60km and over	3%	3%	3%	2%	3%

Southampton and Portsmouth are both fairly urban, high-density authorities, and consequently both have high levels of commuting trips under 5km – both at 59%, making them very suitable for walking and cycling trips with appropriate infrastructure. The Isle of Wight also has higher than the national average of commuting trips less than 2km at 29%, with 13% of commuting trips here done on foot, suggesting that a sizeable proportion of people here work locally and already commute by sustainable means (although with improved facilities, this could be increased). Hampshire has the most long-distance commutes out of all the authorities, with 38% of commutes over 10km – this is likely due to the presence of multiple urban centres with employment within Hampshire itself, as well as commuting connections to Southampton, Portsmouth, London and other surrounding authorities.

Appendix G. Other Transport Schemes

The table below summarises less strategic transport infrastructure proposals identified through a desktop review of various local, regional and national documents. Sources include Local Transport Plans, Bus Service Improvement Plans and Local Cycling and Walking Improvement Plans for Hampshire County Council, Southampton City Council, Portsmouth City Council, Isle of Wight Council. Additional sources include wider regional strategies (e.g. Transport for the South East Transport Strategy) and national strategies (e.g. produced by Network Rail and National Highways). Strategic transport infrastructure proposals are summarised in Section 4.4.

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Public Transport	Southampton - Woolston crossing	Construction of new rail tunnel between Southampton Central and Woolston crossing the River Itchen.	✓	✓	✓
Public Transport	Portsmouth station platforms	Additional platform capacity for trains terminating at Portsmouth by either reopening disused Platform 2 at Portsmouth Harbour (preferred by council) or by providing additional low level platform at Portsmouth and Southsea. This will increase rail capacity and improve timetable flexibility and resilience.	✓	✓	✓
Public Transport	New Southampton City Centre Station	New railway station in city centre to provide better access to rail network from central Southampton and West Quay development and complement South Hampshire Rail (Enhanced) Package, particularly Woolston crossing.	✓	✓	✓
Public Transport	Eastleigh Station platform flexibility	Signalling alterations to allow platform 1 to operate as a bi-directional platform to enable additional rail services and improve reliability in the area.			✓
Public Transport	Southampton Cruise Terminal access for mass transit	Consideration of options for extending MRT and/or rail to serve Southampton Cruise Terminal, including by working with cruise lines, to improve connectivity of terminal via sustainable modes during cruise departure days.			✓
Public Transport	Improved Real Time Passenger Information (RTPI) at bus stops	Improved RTPI at bus stops across the region		✓	✓
Public Transport	Park and Ride bus priority improvements- Unicorn Gate/Clarence Street	Provision of bus priority measures for bus services leaving the city centre that currently turn right at Unicorn Gate into Marketway.		✓	✓
Public Transport	Bishopstoke road Eastleigh bus priority	Bus priority between Eastleigh and Fair Oak, including the following elements: the conversion of the Riverside Junction to signal control; a westbound bus lane leading to a general traffic pre-signal and bus gate east of the bridge over the western channel of the Itchen; and conversion of the junction of Chicken Hall Lane to signal control and incorporating widening of the northbound approach on Chicken Hall Lane to two lanes.		✓	✓
Public Transport	Basingstoke - West Ham Roundabout bus priority and junction change	Bus priority between Manydown/West Basingstoke and the Town Centre consisting of bus priority at West Ham roundabout, converting Worting Rd roundabout to a signalised crossroads, EB jet lane for buses at Victory roundabout, AVL at signals at Thorneycroft, the new Worting Rd staggered t-junction signals and the junction on Churchill Way West between Thornycroft and Victory roundabouts		✓	✓
Public Transport	New Street Bus Lane and ped/cycle accessibility improvements & Winton Square Modal Filter	Introduce southbound Bus Lane and changes to signals to improve punctuality/ reliability on route 1 & 3. Modal Filter at Winton Square		✓	✓
Public Transport	Hamble Lane Bus Gate	Introduce new Bus Lane to cross Hamble Lane from A3025 Portsmouth Rd to Lowford Hill to improve punctuality/ reliability on route X4/5		✓	✓
Public Transport	Digital Demand Responsive Transport (DDRT) /	Roll out of other rural DDRT schemes replication of existing TOD Scheme in Test Valley. Increase capacity and geographical reach of Community Transport.		✓	✓

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
	Community Transport expansion scheme				
Public Transport	Smart ticketing	Roll out of multi operator smart ticketing, including travel planning app with multi-modal ticketing and mobility credits.		✓	✓
International Gateways and Freight	Additional rail freight paths to Southampton	Programme including strategic passing loops and timetable optimisation to increase freight capacity and accommodate anticipated growth in container traffic at Port of Southampton.			✓
International Gateways and Freight	Rail freight access/ loading upgrades at Southampton Container/ Automotive Ports	Upgrades to rail freight access and loading at Southampton Existing Automotive Port and Southampton Container Port, including extending loading area and junction improvements to increase capacity for freight services on South West mainline.	✓		✓
International Gateways and Freight	Container Shuttle to Fratton rail freight yard	Proposed electric truck shuttle to allow rail shipments to/from port.	✓		✓
International Gateways and Freight	A34 road freight facilities	Additional road freight facilities on the A34 allowing for drivers to take breaks – potentially sited near Winchester, Newbury and Bicester	✓		✓
International Gateways and Freight	A303 road freight facilities	Additional road freight facilities on the A34 allowing for drivers to take breaks – potentially sited near Andover and in Yeovil/Ilminster area	✓		✓
International Gateways and Freight	M40 road freight facilities	Additional road freight facilities on the A34 allowing for drivers to take breaks – potentially sited near Bicester and south of Warwick	✓		✓
Active Travel / Urban Centres	Tipner-Horsea bridge	To provide a public transport / active modes link between Tipner and Horsea Island to support potential development in area and improve sustainable travel network.	✓	✓	✓
Active Travel / Urban Centres	West Wight Greenway	13-mile route between Freshwater and Newport for cyclists and walkers making use of existing rights of way and dismantled railway line. Would provide important link to rest of cycle network.		✓	✓
Active Travel / Urban Centres	Island Green Link	Improved cycling, walking and bus routes between Ryde and Yarmouth to improve accessibility and East-West connectivity on the Island.		✓	✓
Active Travel / Urban Centres	South East Hampshire Area Active Travel	Inter urban cycling enhancements including use of National Cycle Network to improve access to points of interest via segregated active travel.		✓	✓
Active Travel / Urban Centres	Portsmouth Harbour Station Travel Plan	Initial improvements to be assessed include reinstalling a pedestrian crossing on The Hard Rd, and improving the crossing environment for pedestrians across the site junctions	✓	✓	✓
Active Travel / Urban Centres	Portsmouth Eastern Road Bridge	Introduction of additional bridge across Eastern Road to safely link paths on both sides, and either widen existing bridge or provide new cantilevered bridge to facilitate people walking, wheeling or scooting.			✓
Active Travel / Urban Centres	Southampton City Centre Placemaking	Placemaking measures to encourage take-up of walking and cycling and improve perceptions of the urban realm.			✓

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Active Travel / Urban Centres	Isle of Wight active travel enhancements	Active travel enhancements in Newport and surrounding area to encourage take-up of walking and cycling, reducing need for private car for short trips.		✓	✓
Active Travel / Urban Centres	Connections to Central Station	Major new green spine connecting Central Station to waterfront.	✓		✓
Active Travel / Urban Centres	Bridge connecting Mayflower Park	Enhanced pedestrian/cycle connections or new green bridge across West Quay Road to link key public spaces	✓		✓
Active Travel / Urban Centres	Cycle access to Navigator Quarter	New segregated cycle path / footway along Mitchell Way to connect with existing routes at the airport.	✓		✓
Active Travel / Urban Centres	Healthy Streets Infrastructure	Mode-shift schemes that will allow residents to walk and cycle in a safe and relaxed environment	✓	✓	✓
Active Travel / Urban Centres	London Road Safer Roads Scheme	A corridor treatment scheme which aims to improve safety along the A2047 by implementing targeted measures such as junction upgrades, pedestrian crossings, cycle lane improvements, and high-friction surfacing based on collision data and iRAP analysis, with the goal of reducing serious injuries and enhancing accessibility for all road users.		✓	✓
Active Travel / Urban Centres	Strategic Transport Assessment mitigation: Spur Road Roundabout	Spur road roundabout in Cosham is expected to see additional traffic movements due to growth in the PCC Local Plan. Current safety issues, and therefore a need for mitigation to improve safety, both for vehicles and particularly for cycle users, has been identified by the Local Plan Transport Assessment. It is noted that this junction forms part of an LCWIP route.	✓	✓	✓
Active Travel / Urban Centres	Portsbridge Roundabout	Scheme to improve capacity, safety /queuing on the SRN (27), and bus priority at this key pinch point. The scheme also would be expected to improve parallel walking / cycling routes around the west side of the roundabout. The scheme would help to increase capacity to support/mitigate impacts of the Lakeside development allocation in the draft PCC local plan, and improve bus movements through this roundabout (a key roundabout for bus access to / from Portsea Island).		✓	✓
Active Travel / Urban Centres	Queen Street cycle corridor	Creation of an LTN 1/20 compliant off-road cycle route along Queen Street, from The Hard to the Anglesea Road junction, as part of the ongoing development of PCC's LCWIP and east-west routes across the city centre.		✓	✓
Active Travel / Urban Centres	Active Pompey Neighbourhoods (APN)	PCC are developing proposals for two new APNs for development towards delivery in next two years - the main proposal being for the area of North End between London Road and Copnor Road (centred on Mayfield school).		✓	✓
Active Travel / Urban Centres	Eastern Road Active Travel Corridor - Airport Service Road to Anchorage Road	Widening of the existing shared use path to provide a fully segregated footway/cycleway		✓	✓
Active Travel / Urban Centres	Eastern Road Active Travel Corridor - Milton Common	Widening of existing shared use path across Milton Common		✓	✓
Active Travel / Urban Centres	London Road - Portsdown Hill off road cycle route	Provision of off-road LTN1/20 compliant cycle route (a stepped, segregated footway / cycle lane) along both sides of the A3 London Road, Widley, between B2177 Southwick Hill Road and the top of Portsdown Hill. This is a key part of the link between Cosham and Purbrook/Waterlooville		✓	✓
Active Travel / Urban Centres	The Hard to Cambridge Road LCWIP scheme	Creation of an LTN 1/20 compliant off-road cycle route from The Hard via St Georges Road to the Cambridge Rd roundabout, complimentary scheme to the ongoing development of PCC's LCWIP and east-west routes across the city centre.		✓	✓
Active Travel / Urban Centres	City Centre Road	Reconfiguration of A3 Marketway/Hope Street to release land for city centre regeneration (up to 4,100 dwellings in City Centre strategic allocation in draft Local Plan), together with provision of active travel/public transport routes		✓	✓

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Active Travel / Urban Centres	Fratton station to Pompey Centre footbridge/ off road ped & cycle route	Creation of an off-road pedestrian and cycle link from Fratton park/ Pompey Centre development allocation to Fratton station to provide an alternative to the current narrow route along Goldsmith Avenue. Requirement for scheme identified in PCC draft Local Plan- see PCC Addendum policy PLP7		✓	✓
Active Travel / Urban Centres	Liveable City Centre	Revitalise the Bargate area with enhanced public spaces, improved access, a new city centre cycle route and activation of public spaces such as Hanover Square, East Street and Portland Terrace		✓	✓
Active Travel / Urban Centres	Itchen Boardwalk NCR23	Replacement of boardwalk and eroded bank on existing cycle facility		✓	✓
Active Travel / Urban Centres	SCN6 City East Cycle Strategy	Deliver a new cycle route from Solent University and Kingsland Estate to the City Centre, with secure cycle parking to support active travel and improve access to key destinations		✓	✓
Active Travel / Urban Centres	A3024 Six Dials / Ring Road	Upgrade Six Dials junction to improve capacity, pedestrian safety and link with Ring Road works, while enhancing connectivity and placemaking along the Saints Mile		✓	✓
Active Travel / Urban Centres	Better access for University Hospital Southampton	Revise Hospital Access Plan to ease congestion around University Hospital Southampton through improved junctions, rapid bus priority, and upgrades to the Orbital Cycle Route	✓	✓	✓
Active Travel / Urban Centres	Southampton TCF - A27 Providence Hill Cycle Link	Pedestrian and cycling improvements are required between Windhover Roundabout to Church Lane linked to the potential funding from TCF. The aim of this scheme is to improve provide a new cycle link between Windhover roundabout and Church Lane on the A27 improving cycle links in the area. This scheme will provide a cycling link along the A27 together with cycle friendly improvements at existing key junctions.		✓	✓
Active Travel / Urban Centres	Southern Gateway (Botley)	This scheme completes the Botley by-pass project by improving active travel links on Woodhouse Lane and small scale widening/drainage improvements.		✓	✓
Active Travel / Urban Centres	Andover Railway Station Placemaking	This scheme looks to improve the visual and physical connection between the railway station and the town centre. Public realm enhancements along with improvements to walking and cycling facilities will help to facilitate and encourage active travel.		✓	✓
Active Travel / Urban Centres	Havant Footbridge Replacement	The current footbridge is at the end of its serviceable life and urgently requires replacement to ensure safe and reliable access. This project will deliver a modern, future-proof structure that is wider, supports both pedestrian and cycle use, and incorporates gentle ramps for full accessibility.		✓	✓
Active Travel / Urban Centres	Botley Village	A scheme to improve Botley Village centre following the opening of the Botley bypass. The scheme aims to reduce the journey time of the existing A334 so that the Bypass is the preferred route choice for through traffic. This will be done by reducing capacity of the route at key points through the village by improving pedestrian/cycle infrastructure as well as other urban realm improvements.		✓	✓
Active Travel / Urban Centres	Gosport Mumby Road cycle route	Proposal for LTN 1/20 Fully Segregated cycleway on South Street from foster Road to the Ferry Terminal and Mumby Road from Spring Gardens Lane to the Ferry terminal, Gosport. Route is number one LCWIP priority in GBC.		✓	✓
Active Travel / Urban Centres	A27 Portchester corridor (LCWIP)	Feasibility study to consider design options for a high quality LTN1/20 compliant walking and cycling scheme along the A27 in Portchester between Downend Road and the Portsmouth boundary.		✓	✓
Active Travel / Urban Centres	Badger Farm Road junction	Feasibility study to improve access at the junction for pedestrians and cyclists, including wheelchair and pushchair users to safely cross the junction of the A3090 (Badger Farm Road) with Olivers Battery Road N/S. Scope includes consideration of wider cycle route improvements including along Oliver's Battery Road South and for connections to Ridgeway, as well as need for bus priority along part of Badger Farm Road.		✓	✓
Active Travel / Urban Centres	Eastern Andover Walworth Road corridor	Improvements to Walworth Road corridor for walking, wheeling and cycling. To include separate cycleway, widened footway, new crossings and link through Pilgrim's Way estate to other cycle routes including onward connection to town centre/station.		✓	✓

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Active Travel / Urban Centres	Fair Oak Road LCWIP Primary Route	Use of DfT capability fund to develop LTN 1/20 compliant cycle route between Underwood Road and Riverside		✓	✓
Active Travel / Urban Centres	Twyford Road Foot/Cycle Bridge	To retain pedestrian access across the railway line by either replacing or repairing the Archers Road footbridge or providing an alternative in another location.		✓	✓
Active Travel / Urban Centres	Petersfield Road (Havant)	Continuation of LTN1/20 active travel route from Elmleigh Road (TCF/ATF funded) to better link into Leigh Park (part of LCWIP).		✓	✓
Active Travel / Urban Centres	Romsey to Timsbury Phase 2	Continuation of off-road cycle route (part of NCN) between Romsey and Timsbury. Using a mix of shared use path and quiet routes.		✓	✓
Active Travel / Urban Centres	Crookham Park to Calthorpe Park Cycle Route, Fleet	Package of walking and cycling improvements, mix of quiet routes, off-road routes and some segregation.		✓	✓
Active Travel / Urban Centres	Fleet station access improvements	Improvements to station access (junction) for walking and cycling, new LTN1/20 routes to Fleet town centre and Hartlands Village. Some of the route to Hartlands delivered via s278.		✓	✓
Active Travel / Urban Centres	Hitches Lane Walking and Cycling Improvements	To provide a cycle route along Hitches Lane that connects an existing cycle route near Calthorpe Park and Elvetham Heath to the north.		✓	✓
Active Travel / Urban Centres	Windhover Roundabout Improvements	Provide improved ped/cycle crossings of junction/arms to link up new active travel infrastructure either side of junction.		✓	✓
Decarbonisation / Air Quality	Reading - Basingstoke Electrification	Electrification of Reading - Basingstoke line to support decarbonisation of rail network and enable sustainable freight movements along corridor.			✓
Mobility Hubs	Cosham Station Mobility Hub	Mobility Hub to provide interchange between private car, public transport, active travel and other transport modes to improve end-to-end journey quality.			✓
Mobility Hubs	M27 Junction 7 / 8 Strategic Mobility Hub	Strategic Mobility Hub for efficient multi-modal journeys between M3/M27 and Southampton City Centre.			✓
Mobility Hubs	M27 Junction 9 Strategic Mobility Hub	Strategic Mobility Hub including rail, P&R, bus services and active travel options to provide opportunities for efficient multi-modal journeys between M3/M27 and Southampton City Centre.			✓
Other Bus	Southampton City Centre Bus priority loop	To bring buses closer to the heart of the city, limit non-bus access to pedestrian priority core and make bus travel safe and attractive.			✓
Other Bus	Major upgrade at bus station - Fareham	Removing existing bus station structure and delivering improved facility with well lit, attractive waiting environment protected from the elements. Being considered as part of wider plans for regeneration of Fareham Town Centre.			✓
Other Bus	Major upgrade at bus station - Basingstoke	Relocate or upgrade waiting facilities at Basingstoke Bus station, to offer a more attractive waiting environment, comparable in quality to other bus stations.		✓	✓
Other Bus	Major upgrade at bus station - Winchester	Current bus station is being redeveloped as a mixed use development by ~2027/28 as part of Central Winchester Regeneration project. Stands in bus station to be replaced with on-street bus stops and stands.			✓

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Other Bus	Major upgrade at bus station - Havant	Full refurbishment of Havant Bus Station to modernise and bring up to a higher standard of passenger experience.		✓	✓
Other Bus	Major upgrade at bus station - Farnborough	Reconfiguration of bus stands and replacement of waiting shelters to offer a more attractive environment for bus/rail interchange and to support the town centre regeneration.		✓	✓
Other Bus	Berkshire, Hampshire & Surrey Urban/Inter-urban bus enhancements	Inter-urban bus enhancements to enable frequent, reliable express services to connect major economic hubs.			✓
Other Rail	Fareham Loop / Platform	Conversion of Platform 2 to through platform to free up capacity at the station and improve timetable flexibility and resilience.	✓		✓
Other Rail	Isle of Wight rail service enhancements/extensions	Extension of Island Line from Shanklin to Ventnor and reinstating rail connection between Island Line and Newport (or mass transit alternatives), as well as extending operating hours and increasing frequency of service to reduce wait times, improve service reliability between island and mainland and promote increased economic activity.		✓	✓
Other Rail	South West Mainline Digital Signalling	Introduction of digital signalling on South West Main Line to increase capacity/safety of rail passenger/freight movements.			✓
Waterborne	New summer ferry routes to Southampton: Ryde to Southampton	New ferry services in summer months to boost visitor economy and enable travellers to reach final destination via localised, sustainable modes.		✓	✓
Waterborne	Water taxi network	Making use of the waterways to connect areas that are more difficult to connect by land.	✓	✓	✓
Road	Hayling Island Bridge Renewal	A potential second bridge to alleviate traffic and support development on Hayling Island		✓	✓
Road	Portsmouth City Centre Road	Measures to address issues around traffic accessing city from M275 to release land for development and regeneration and support use of all modes, including bus and active travel.	✓		✓
Road	Northam Bridge replacement/enhancement	Removal of major bottleneck caused by single lane of Northam Rail Bridge between two sections of dual carriageway on A3024 - this will increase capacity, reduce journey times and improve network resilience.			✓
Road	M3 Junction 7 & 8 safety/capacity enhancements	Changes at Junctions 7 (Basingstoke) and 8 (A303) to support increased safety of road users.		✓	✓
Road	A34 Junction and safety enhancements	Changes to A34 junctions between Winchester and Newbury to support increased safety of all road users and improve journey time reliability for strategic freight movements.			✓
Road	A339 Newbury to Basingstoke safety enhancements	Changes to A339 between Basingstoke and Newbury to support increased safety for all road users and improve journey time reliability for strategic freight movements.			✓
Road	A33 corridor link	Improvements to serve as an M3-M4 link.			✓
Road	A34 upgrade	Upgrades on A34 to make it motorway standard.			✓

Type	Infrastructure	Description	Supporting development	Supporting social inclusion	Supporting other priorities
Road	M27 and M3 journey time reliability improvements	Selected improvements on these corridors to improve journey time reliability.	✓		✓
Road	Redbridge Causeway	Improvements to the crossing.			✓
Road	London Road/ Stubbington Avenue Roundabout- safety improvement scheme	Improve safety at London Rd / Stubbington Avenue/Gladys Avenue junction - proposed changes to roundabout to reduce casualty risk.		✓	✓
Road	Limberline Rd/Gunstore Rd/Limberline Spur junction realignment	Scheme is to improve junction safety/geometry for HGVs at Gunstore Rd/Limberline Rd/Limberline Spur Rd junctions and provide improved access into the Hilsea Industrial Estate, supporting redevelopment and intensified use of industrial units in this area.	✓		✓
Road	A3024 Junction Improvements	Upgrade signalised junctions (including Bullar Road / Athelstan Road) along the A3024 corridor to improve safety and capacity, delivering more reliable journey times between Northam Rail Bridge and Bitterne Centre.		✓	✓
Road	Cart and Horses Junction improvements	Major junction improvements to the Cart and Horses junction. Two options developed: signalised junction and double roundabout. Scheme required, and dependent on, National Highway proposals at M3 Junction 9.			✓
Road	New Lakeside access to aid development of Lakeside North Harbour - Portsbridge Roundabout	Upgrading single carriageway sections to dual carriageway and providing cycle facilities. Mitigation options investigated to improve junction operation. Potential provision of a new junction to meet needs of a new ferry service and associated facilities.	✓		✓
Road	Upgraded junction at Whale Island Way	Upgrading single carriageway sections to dual carriageway and providing cycle facilities. Mitigation options investigated to improve junction operation. Potential provision of a new junction to meet needs of a new ferry service and associated facilities.	✓		✓
Road	Rudmore Square right hand turn	Addition of right-hand turn and adoption of Whale Island Way to facilitate HGV traffic flow.	✓		✓