

Public Document Pack

THE HAMPSHIRE PARTNERSHIP

Tuesday, 18th July, 2017
10.30 am
Ashburton Hall, Elizabeth II Court (Podium)
Hampshire County Council

Contact: members.services@hants.gov.uk

A G E N D A

1	Welcome and Announcements - Councillor Roy Perry, Leader of Hampshire County Council
2	Southern Water: Focusing on the future - looking ahead 25 years and beyond (Pages 3 - 22) Sam Underwood from Southern Water will provide an insight into the company's plans for the future and opportunities for innovation.
3	The Hampshire Economy - Playing To Our Strengths (Pages 23 - 88) With Brexit now on the horizon, but considerable uncertainty around post Brexit trading conditions, there has never been a more critical time to support our economy at both a local and national level. David Fletcher, Hampshire County Council's Assistant Director for Economic Development will give a presentation focussing on how we need to play to the competitive economic advantages of Hampshire, and support businesses in optimising the value of innovation, talent, exporting and increased productivity.
4	Any other business
5	Closing remarks - Councillor Roy Perry
6	Future meetings of The Hampshire Partnership Wednesday 1 November 2017 Provisional dates for 2018: Thursday 15 March (Council Chamber, Castle Hill) Wednesday 11 July Tuesday 13 November All meetings will commence at 10.30am in the Ashburton Hall, Elizabeth II Court, The Castle, Winchester unless stated otherwise.

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Focusing on the future - looking ahead 25 years and beyond

The Hampshire Partnership

18 July, 2017



Our 25 Year Vision

- We are taking a fresh look at our future direction and priorities to ensure they reflect the needs of our customers, communities, the environment and creating a shared vision for our region.
 - We are looking ahead, 25 years and beyond, so the decisions we make now are the right ones for the future.
- Page 5 Our challenge as a business is to break this down into 5-year deliverable – funded through the price review process.



Let's Talk Water - starting the conversation

- We've launched a major campaign – Let's Talk Water - to support the development of a shared long-term vision for the region and our 2020-25 Business Plan.
- We are widening the debate to help us define our future priorities and plan how we deliver our services now and over the longer term.
- Closing date for this consultation phase was 30 June – although we are keen to hear your views throughout the business planning process

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What customers and stakeholders have told us so far

- A reliable, safe drinking water supply and an effective wastewater service should be a given.
- Customers want us to protect the environment, while stakeholders feel we should have more of a leadership role.
- Would like more support, advice and guidance to save water and reduce blockages.
- Would like us to plan for the long-term and consider the needs of future generations.
- Think we should work in partnership with customers and stakeholders.
- Feel we should support customers in vulnerable circumstances.
- Expect us to resolve problems quickly.

Let us know
what you think



southernwater.co.uk/haveyoursay



Challenges and opportunities



Partnerships



Asset age



Economy



Weather



Technology

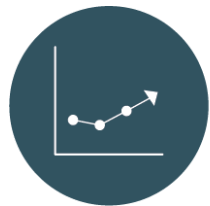


Resilience

Page 8



Political landscape



New markets



Retail competition



Population growth



Vulnerability



Protecting the environment

What do the next 25 years hold?

- Adoption of technology is accelerating in all aspects of our life.
- Future availability of water increasingly relevant as populations grow.
- Climate change – rising temperatures, more intense weather events.
- We expect over 180,000 new homes to be built in the south east over the next 25 years.
- More communities wanting to take control of their energy needs and move away from a centralised system.
- Skills shortages – STEM.
- Already seeing changes to the businesses that make up the south east region.

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What happens next..



Page 10

Working in partnership with customers, communities and stakeholders – panel feedback

- Better use of metering to inform customers of their consumption to help drive behaviour change.
- Work with communities to increase their understanding of water use and the water cycle.
- Join up with other agencies to find ways to bring about behaviour change.
- More pilot projects, eg Cheriton Water Efficiency, at community level.
- Partnership relationship with customers, rather than company/client.
- Needs to work at different scales – small projects that can be scaled up.

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Growth and strategic long-term planning – panel feedback

- New reservoirs, integrated catchment management and new SUDs as part of new development to integrate wildlife and recreation opportunities.
- New developments should consider rainwater harvesting for grey water.
- Creation of localised grey water supplies in new developments to reduce freshwater consumption.
- Consider how to sustainably cope with growth – longer-term discussions at government level.



Opportunities to Innovate

Long-term challenges

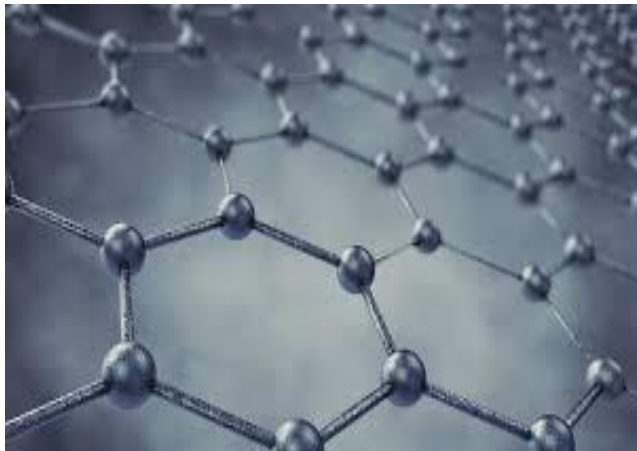


- The South East of England will see some of the greatest challenges in the UK over the next 25 to 50 years
- External challenges will arise from:
 - Climate change
 - Economic Growth
 - Resilience
 - Environmental
 - Energy
- Further challenges to keep bills down

Providing a constant supply of high-quality water



- Manage and co-ordinate everyone who uses water – agriculture, water companies, energy companies and other businesses.
- Trial new technology and harness green energy to build sustainable desalination plants to treat seawater for drinking water.
- Exploit advances in hydropower to capture the energy created by the millions of litres of water and wastewater which flow through our network every day.



Reliably removing wastewater

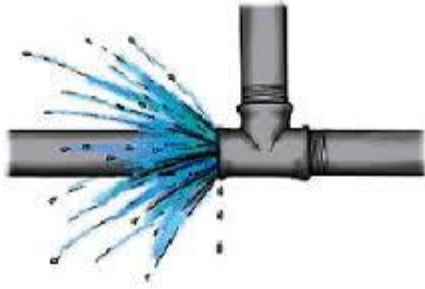
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- Take the lead on flood protection and co-ordinate new sources of funding to support this.
- Harness smart sensors, across our entire wastewater network so we can find and fix blockages as they happen and prevent flooding and pollution.



Reducing water wastage

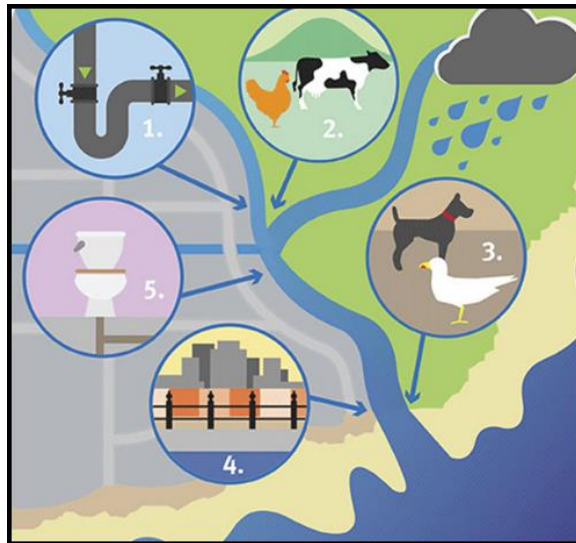


- Reduce leakage by pioneering the development and use of new pipe materials.
- Build smaller, community-based water supply works so drinking water travels shorter distances and is less likely to be lost through leaks.
- Achieve one of the lowest levels of personal water use in the UK through reward schemes and tariffs, water-saving devices.

Protecting the natural environment



- Produce renewable energy across our entire network to power our own operations
 - Feed into the National Grid
 - Support community energy initiatives



- Bring all 83 bathing waters along our coastline up to the 'excellent' standard.
- Trials of new filter technology to transform the way we clean and transport wastewater.

Investing for future generations



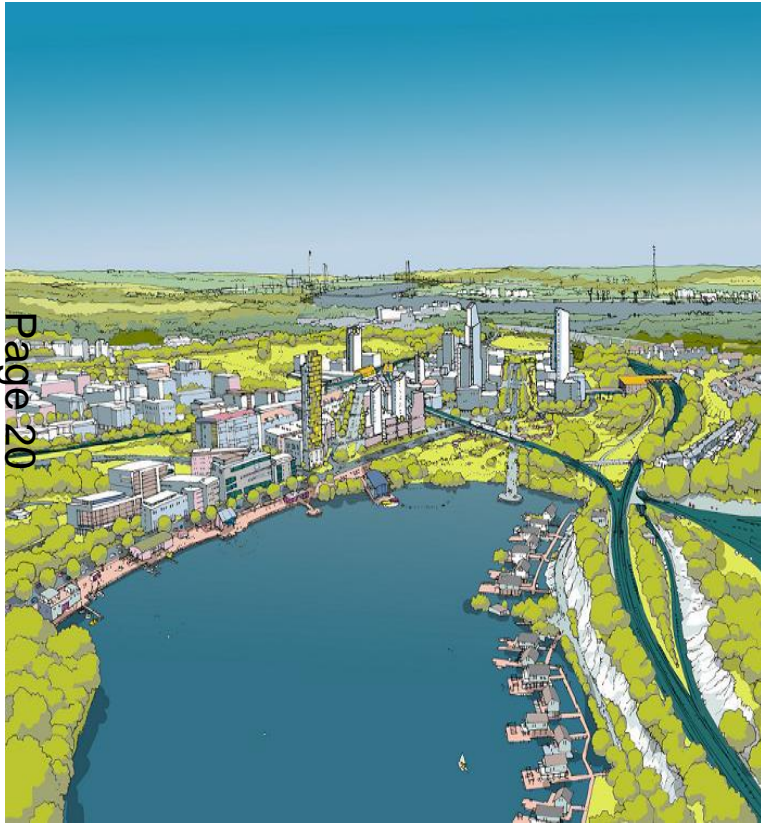
- Creation of new integrated water, wastewater and energy networks for new housing and towns in the South East.
- Development of water re-use schemes to guarantee resilience in water supplies.
- Develop local community-based water and energy facilities

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Ebbfleet Garden City

Developing an integrated and multi-benefit water system for the future



■ Current position

- Proposed new town of 15,000 houses, 750,000 m² of commercial floor space
- Theme Park / Leisure Resort – up to 15m visitors a year

■ Future opportunities

- Multi-beneficial sustainable surface water solutions (e.g. power generation/transport routes)
- Dual water supply to homes (drinking water / grey water)
- Co-digestion with food waste from Theme Park
- Green energy production
- Grey water/water reuse
- 'Poo' buses



For more information, visit:
southernwater.co.uk/planning-for-the-future

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Stakeholder Engagement Manager, Hampshire and IoW
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Mobile: 07775 954206

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The Hampshire economy – playing to our strengths

18 July 2017

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Agenda Item 3

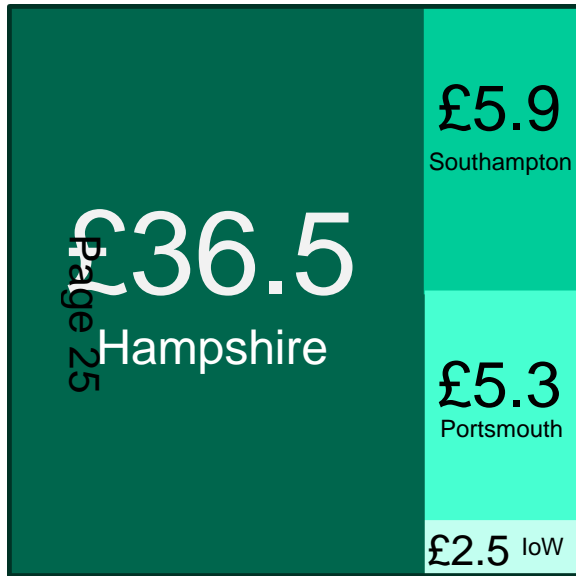
**A large and relatively
successful
economy.....**

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Large and Relatively Successful Economy

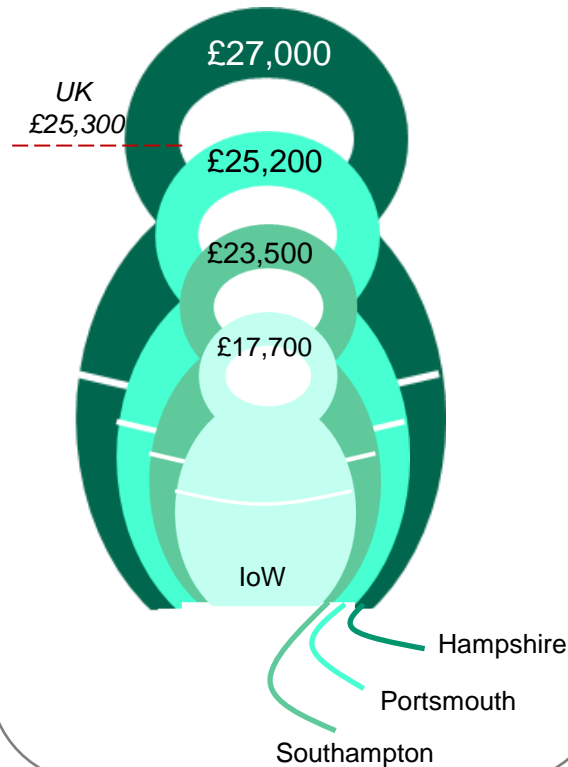
Output - Gross Value Added
£ billion (2015)

HIOW £50.2 billion



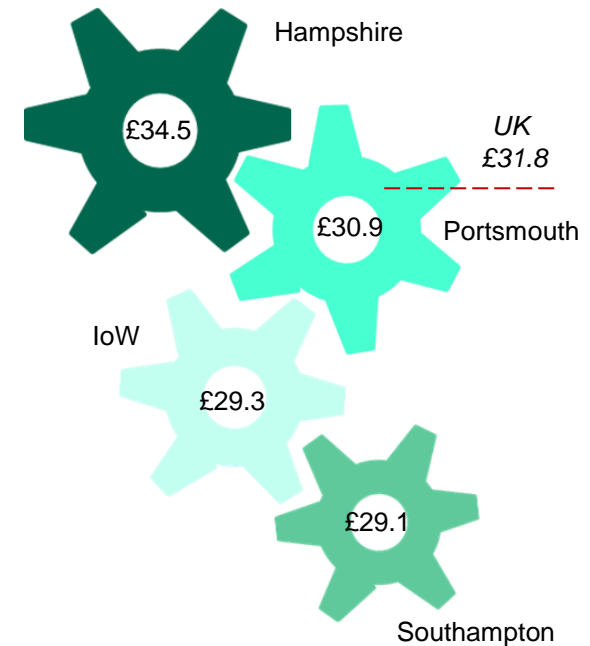
Prosperity - GVA
per head (£ 2015)

HIOW £25,100



Productivity - GVA
per hour worked (£ 2015)

HIOW £33.1

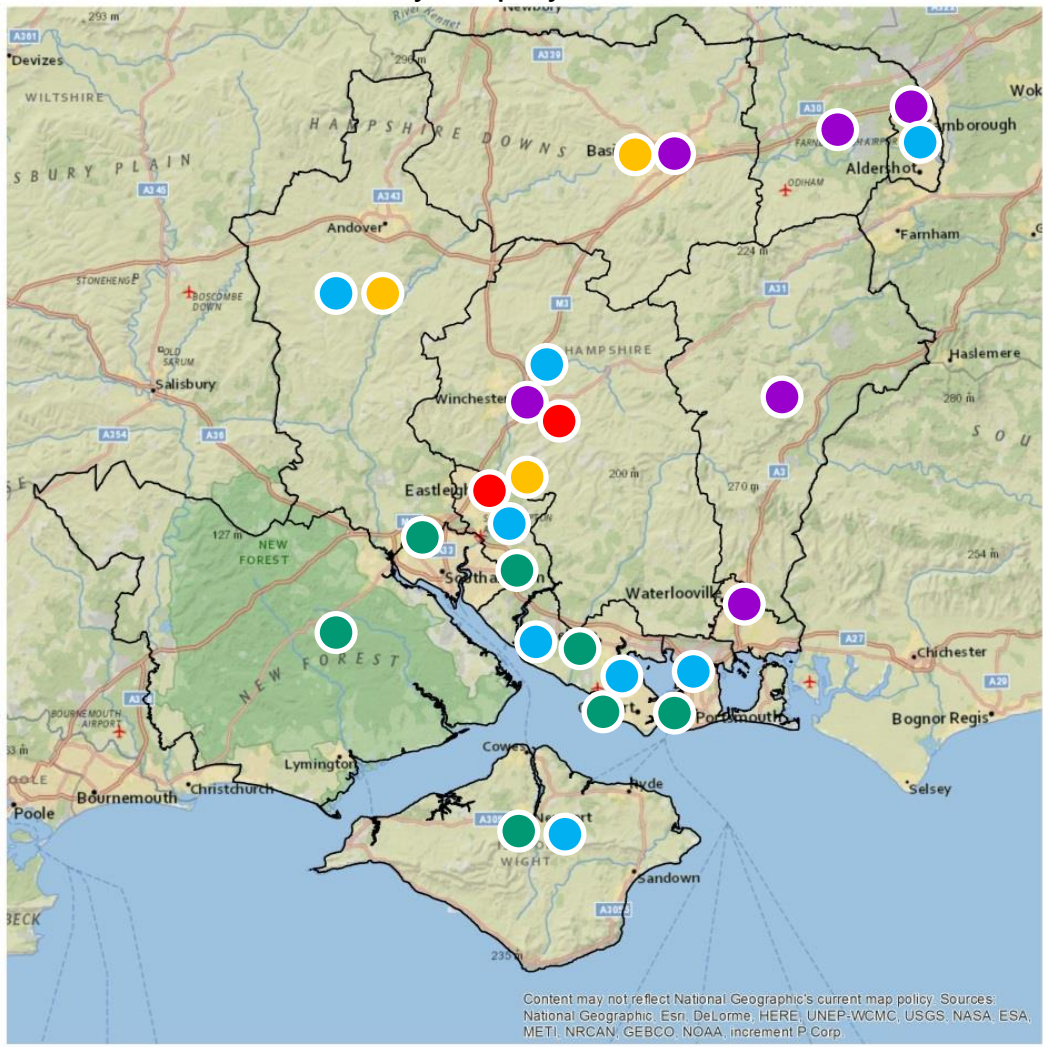


Distribution of Advanced Industrial Sectors (Employment)

HIOW has approximately
850,000 employees

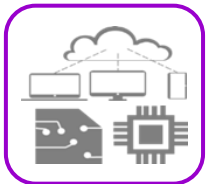
(Employment)

Local Authority Employee Concentrations**



Number of
Employees

ICT &
Digital
Media



61,000

Financial &
Business



59,000

Logistics



58,000

Aerospace
& Defence



17,000

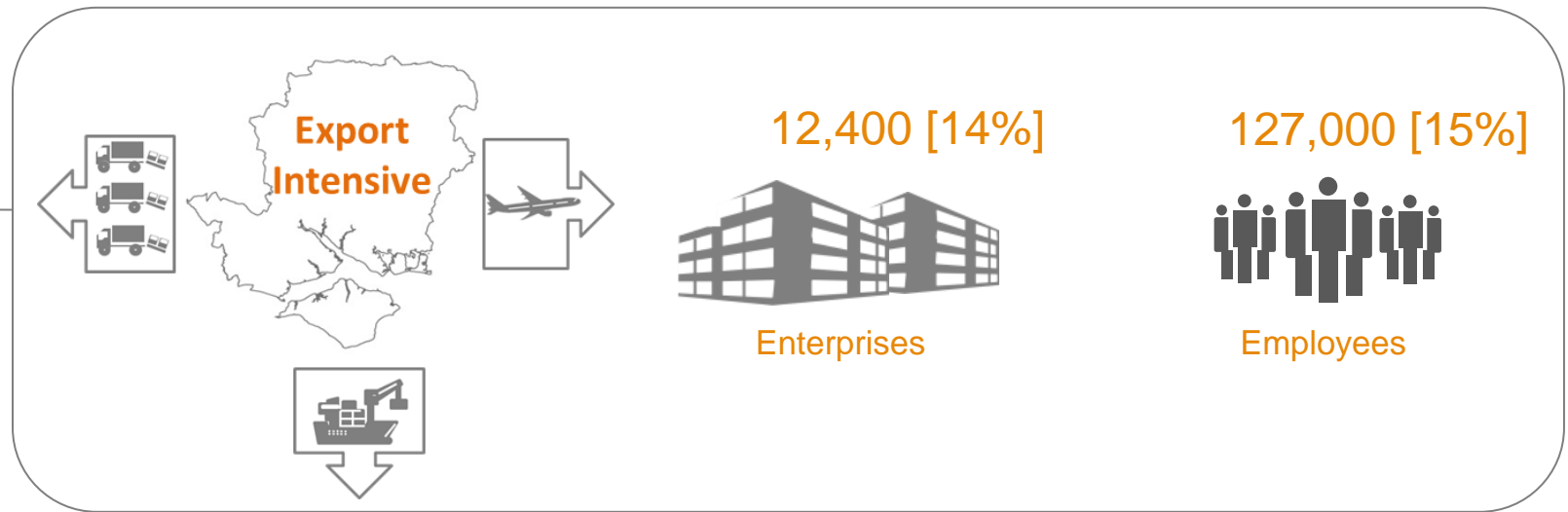
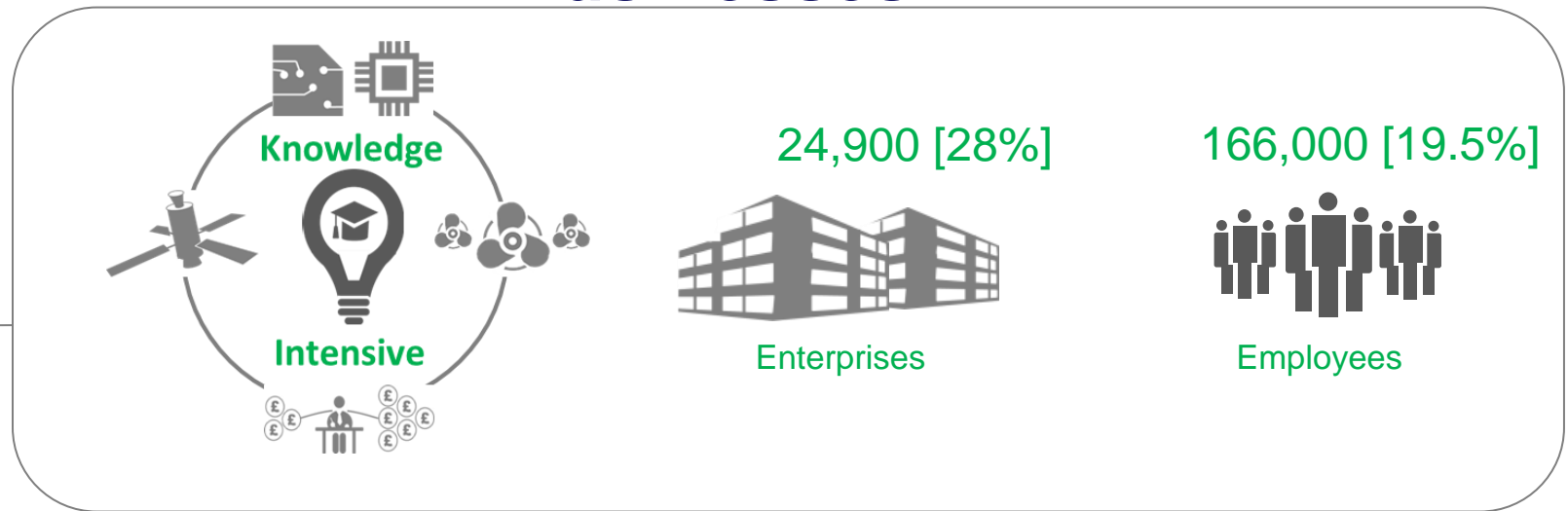
Marine*



10,000



Concentration of Knowledge and Export Intensive Businesses



Page 28
LOW

Highly Skilled Resident Population



HLOW 35.1%
approx 421,500 residents

=



21,800
IoW
residents



41,700
Portsmouth
residents



54,900
Southampton
residents

UK 36.9%



303,100
Hampshire
residents

Level 4+
(degree & equivalent)

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HLOW 19.7%
approx 236,500 residents

=



32,300
Southampton
residents



157,000
Hampshire
residents



15,300
IoW
residents



31,900
Portsmouth
residents

UK 17.0%

Level 3 Only
(A-level & equivalent)



Proximity to London



Page 30



Hampshire
County Council

Southampton Port



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Exports = £40bn



Hampshire
County Council



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Europe's leading business aviation airport



Hampshire
County Council



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Southampton International Airport

on the up

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 University of
Portsmouth

UNIVERSITY OF
Southampton

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 Southampton
SOLENT
University

 THE UNIVERSITY OF
WINCHESTER

 Hampshire
County Council

King Alfred's seat is greatest place
to live

Change of Hart? – not this year

Hampshire district tops Quality of Life Survey for the fifth year in a row



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Some challenges too.....

60%



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Hampshire
County Council

34%



Lack of Supply



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**But plenty of success
stories.....**

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Hampshire
County Council



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Time Inc

Time Inc UK to move dozens of titles out of London in restructuring

Publisher of Marie Claire and NME to announce major changes that will involve 300 staff being relocated



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Hampshire
County Council



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feefo

THE SUNDAY TIMES

TECH
TRACK

100

2016

HISCOX

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Choppier waters ahead?

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Hampshire
County Council



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Hampshire
County Council

Foreign Direct Investment

Still leading FDI location in Europe (21% of projects in 2015), **but.....**

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.....Germany hot on our heels (19% in 2015)

Source: Ernst & Young, 2016

Foreign Direct Investment

53% of HQ projects to UK, *but.....*

.....79% of investors cite access to ESM as
key driver of UK's attractiveness

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Source: Ernst & Young, 2016

NEWS

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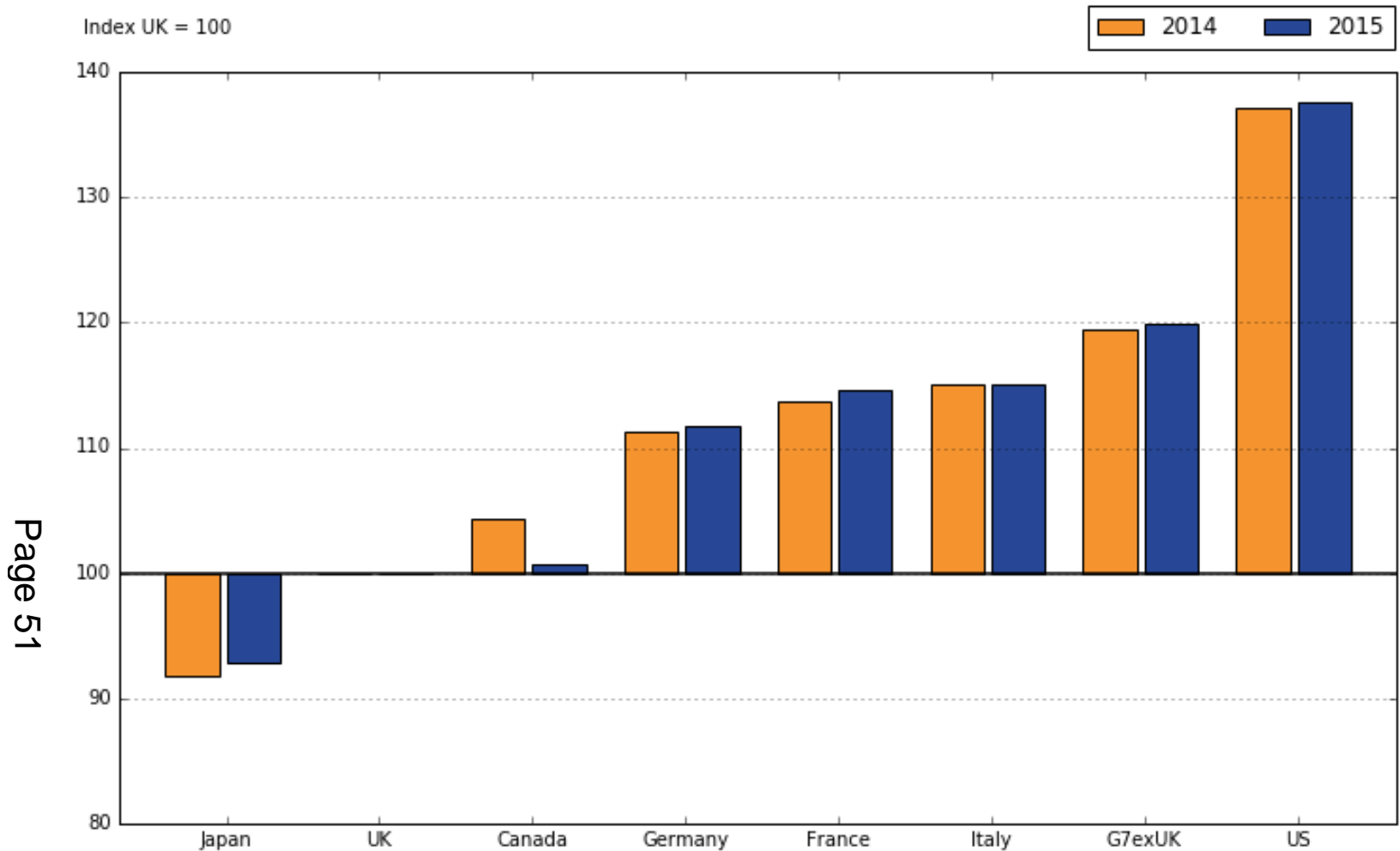
OBR: Productivity gap biggest UK economic uncertainty

🕒 10 December 2014 | [Business](#)



Measures of UK productivity are of use to economic decision makers

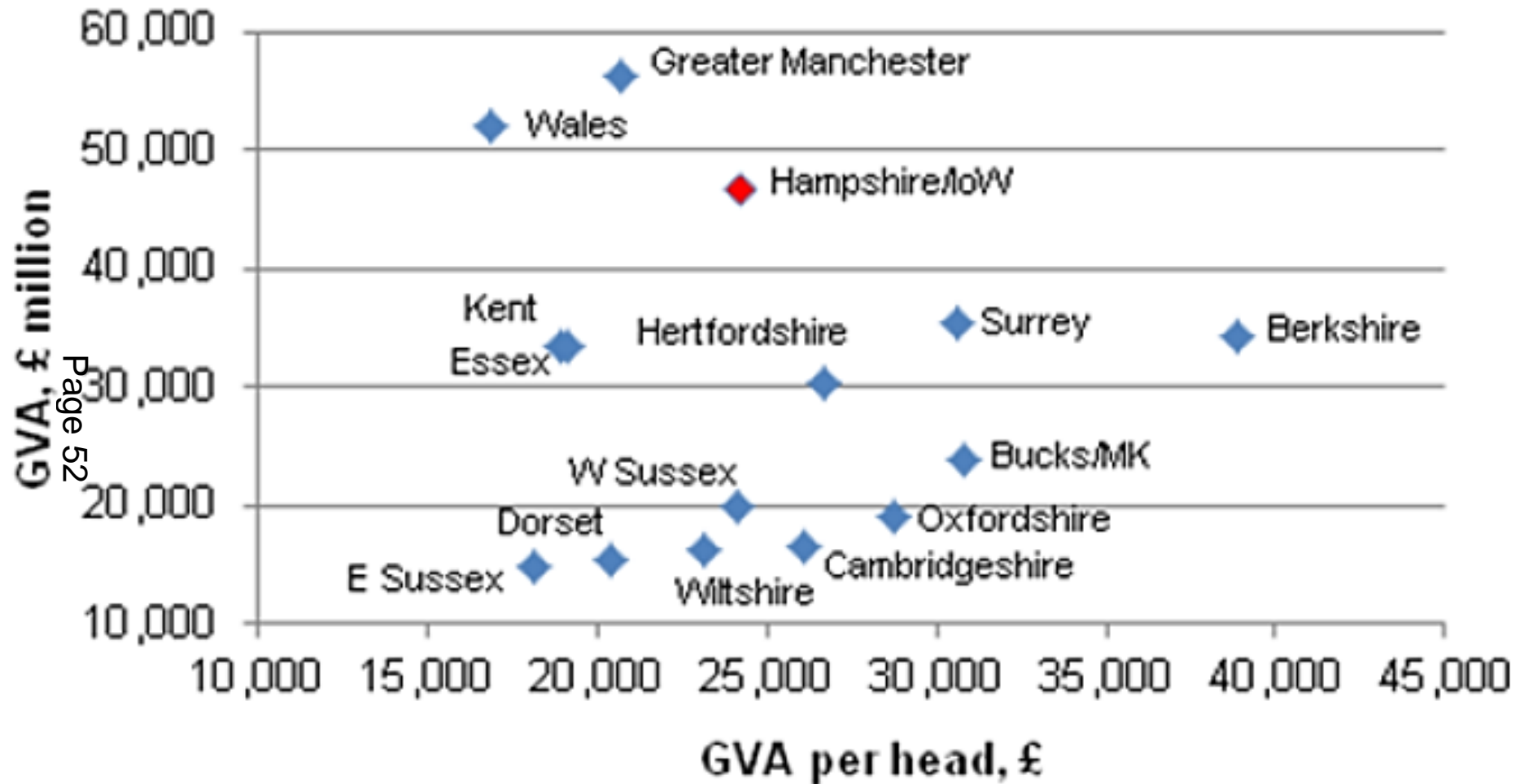
The biggest risk to the UK's economic recovery is that there will be no pick up in productivity, the head of the Office for Budget Responsibility (OBR) has told MPs.



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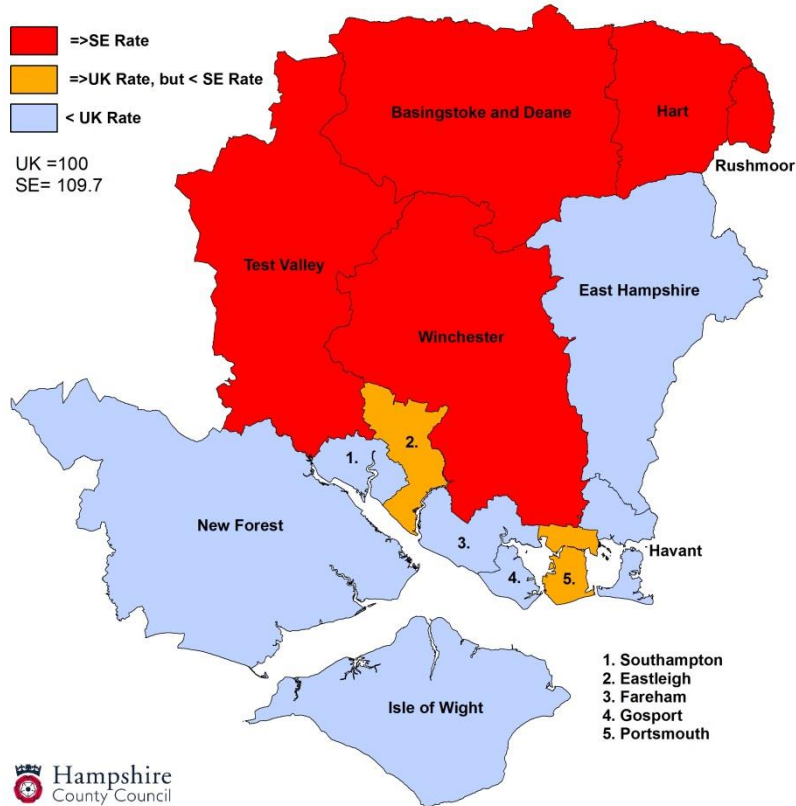
Gross domestic product per worker, G7 countries, 2014 and 2015

GVA / GVA per head, Hants/loW and Comparators

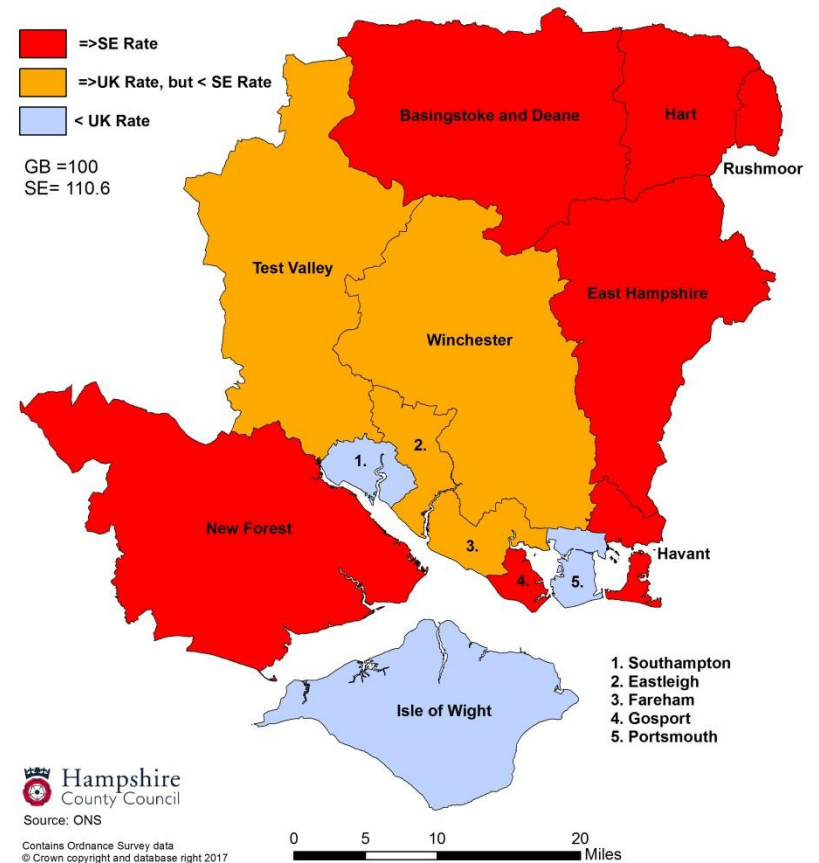


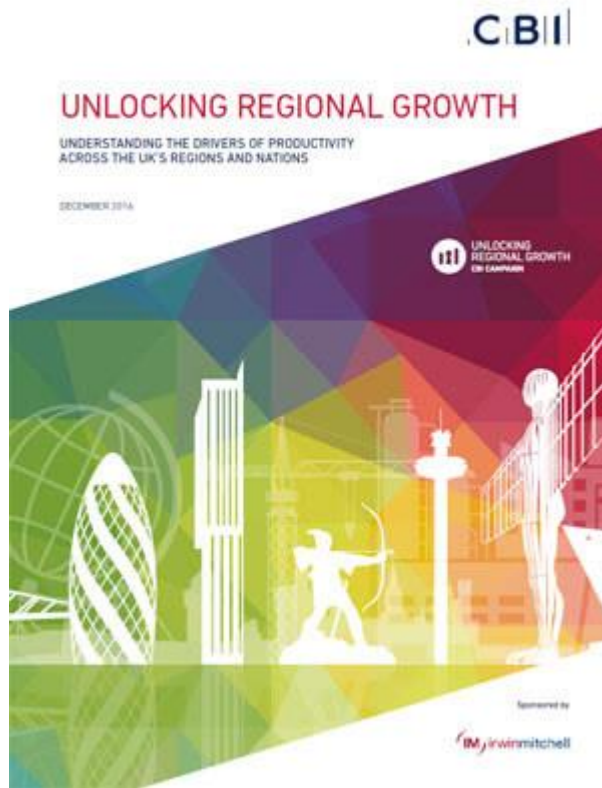
Disparities in Productivity and Economic Prosperity

Economic Prosperity (GVA per Head)



Labour Productivity (GVA per Employee)





“Ensuring strong school performance.....is the single most important driver of productivity across the UK.”

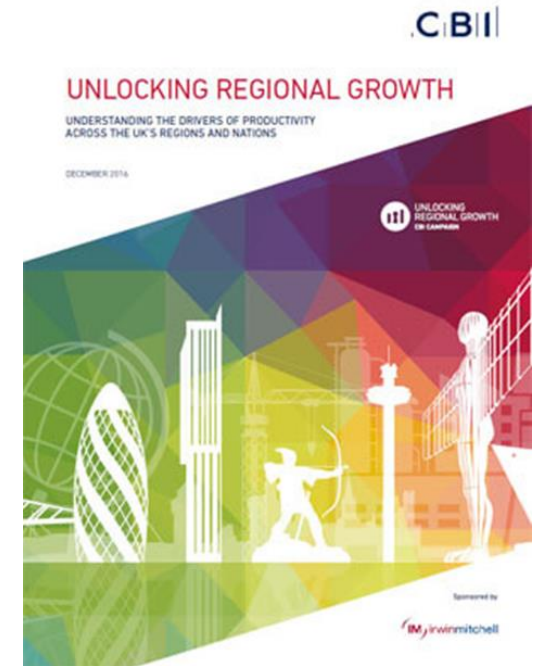
Rethink manufacturing

54% of manufacturing
execs believe a better
educated workforce would
boost their productivity

Read more at
kpmg.com/uk/rethinkmanufacturing



- Transport links
- Better management practices
- Export & innovation



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TIMES CEO SUMMIT

Sir Charlie Mayfield tells CEO Summit: Improving productivity is key to Britain's revival



Sir Charlie Mayfield, chairman of John Lewis, told The Times CEO Summit: "If Brexit is the big political challenge, productivity is the big business challenge"

TIMES NEWSPAPERS LTD

Alex Ralph

June 27 2017, 12:00pm,
The Times

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be the business

Home About Collaboration Hub Contact Login

Welcome to Be The Business.

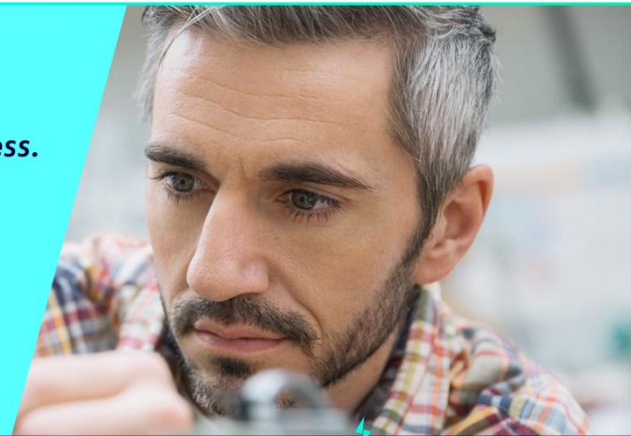
You've already completed Step One by coming here.

Step Two: Register and assess your business.

You don't need to own it to assess it.

Assess yourself

How is this useful?



be the business

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Hampshire County Council

How best to support the economy?

Centre of Excellence in Engineering, Manufacturing and Advanced Skills Training (CEMAST)



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Hampshire
County Council



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Construction Skills Centre

enterprise **m3**
Driving prosperity in the M3 corridor



**East
Hampshire**
DISTRICT COUNCIL

10 Top Tips in Talent Attraction

Guiding Your Region's Quest to Become a Magnet for Skilled Workers

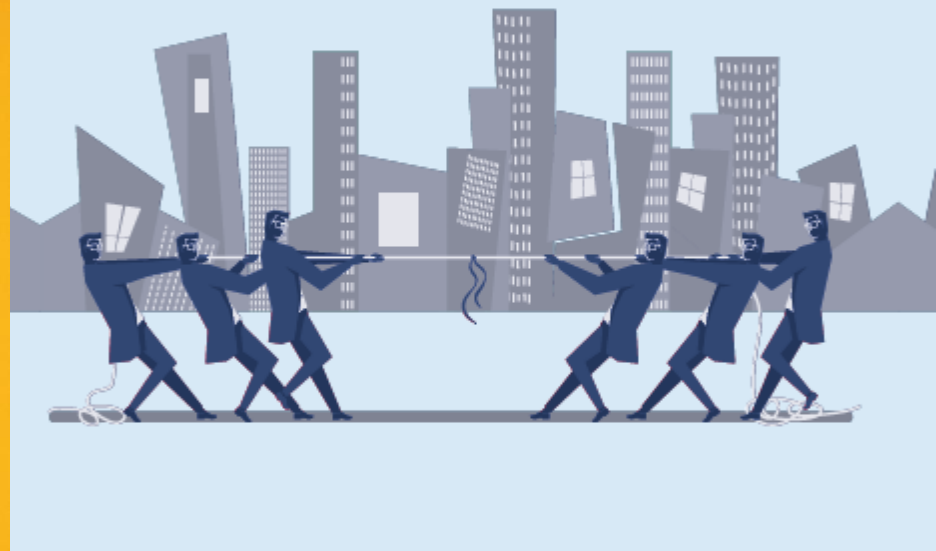
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Prepared by Development Counsellors International | July 2014

TALENT WARS

WHAT PEOPLE LOOK FOR IN JOBS AND LOCATIONS



dci **Q**REPORT
QUARTERLY RESEARCH TO RAISE
YOUR ECONOMIC DEVELOPMENT IQ

2017: Q1



workIT

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with job opportunities

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Watch this!
"RIGHT HERE" VIDEO



Most people know Calgary as the centre of Canada's **energy** industry, as the closest metropolitan centre to the **Rocky Mountains** and as the home of the world-renowned **Calgary Stampede**. Calgary is definitely all of those things, but it's also so much more.

- Mayor Naheed Nenshi

LIFE IN CALGARY

VIEW THE BLOG

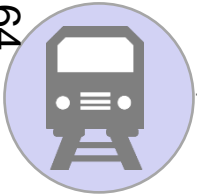


Enablers of Growth & Development

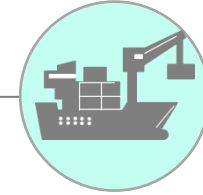
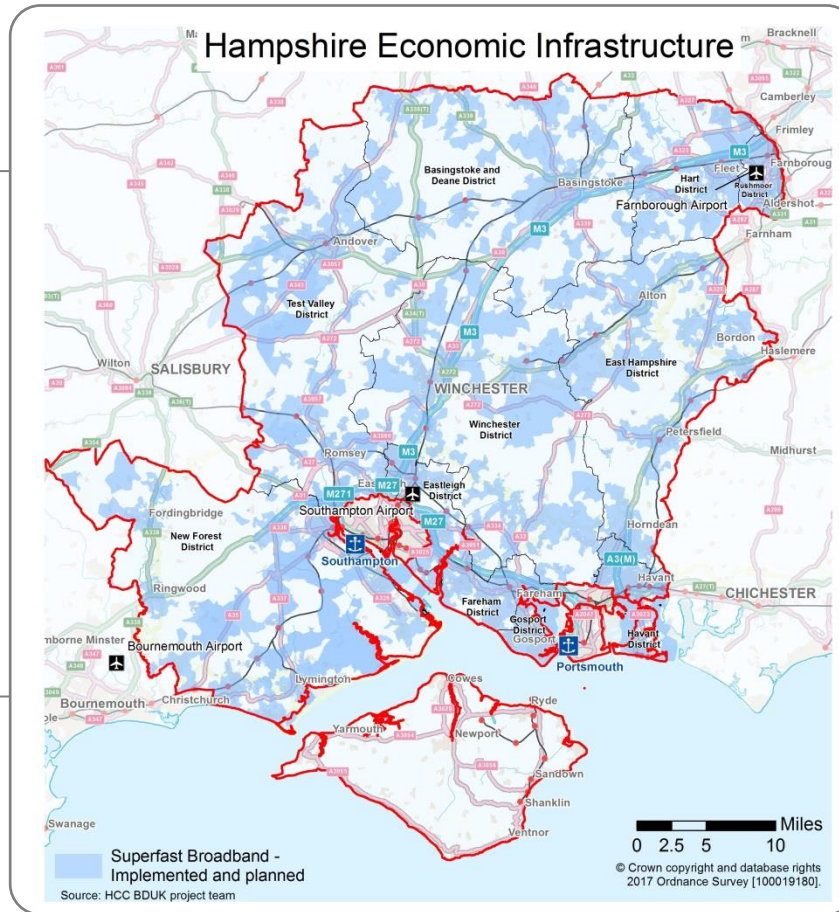


International airport and the UK only prime business/ executive airport

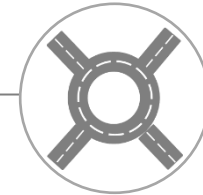
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193 miles of railway track, incorporating 49 stations



Number one vehicle handling port and UK's most productive container port. Naval base home to almost two-thirds of the Royal Navy's surface ships



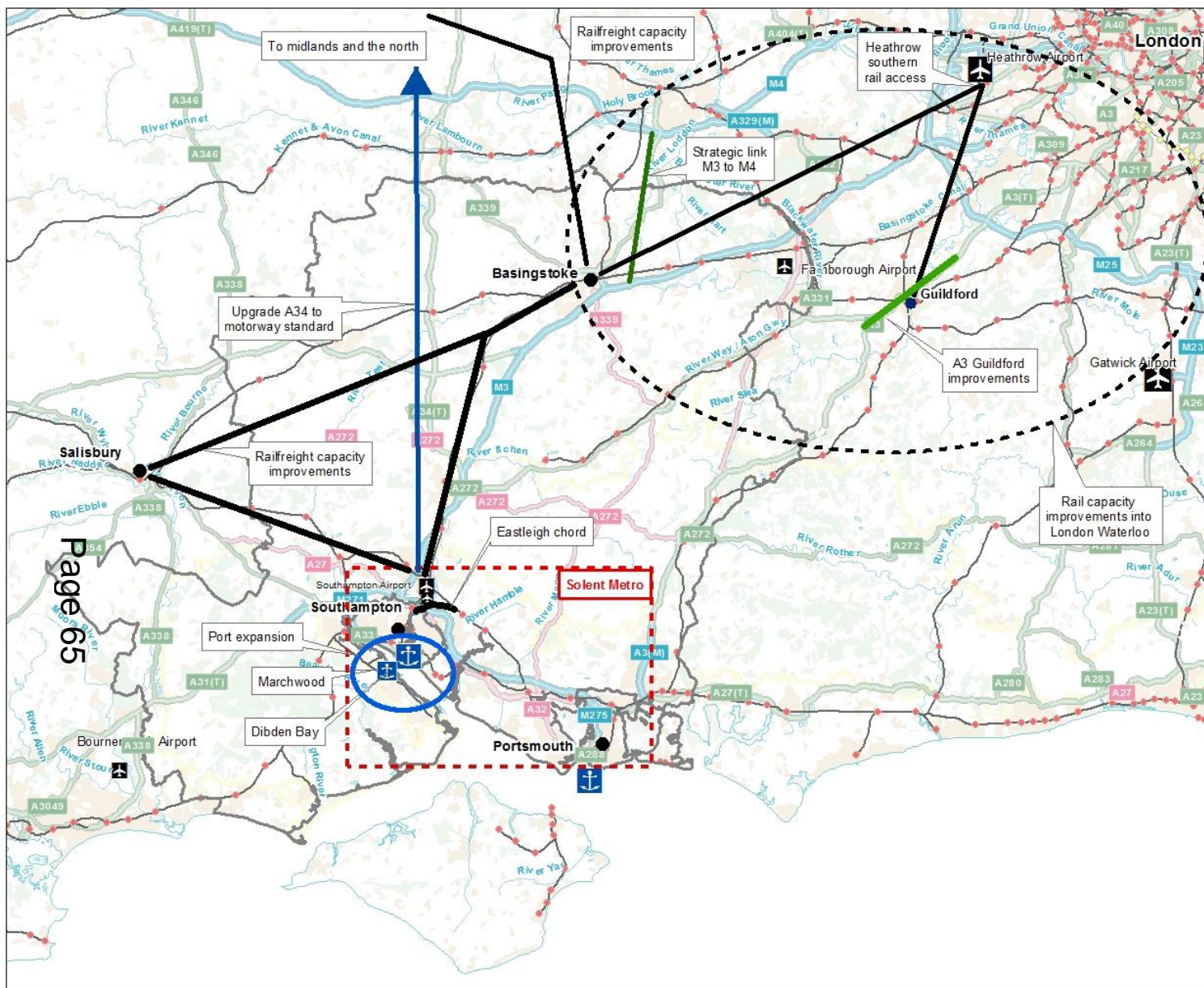
Over 5,000 miles of road. Transport scheme capital programme of £90m this year



90% of premises have access to superfast broadband

Hampshire Strategic Transport Infrastructure Needs

January 2017



Scale:
1:412,500

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McLaren supercar chassis facility to come to South Yorkshire in £50m deal

8 February 2017 | Sheffield & South Yorkshire

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The facility will produce carbon fibre chassis for McLaren supercars

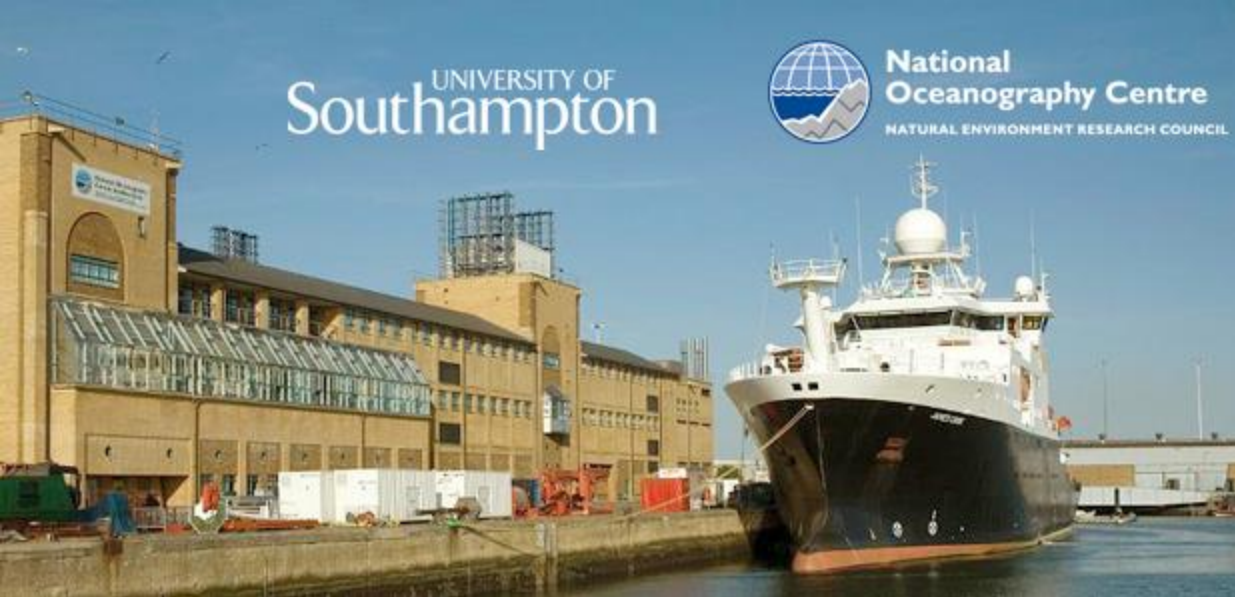
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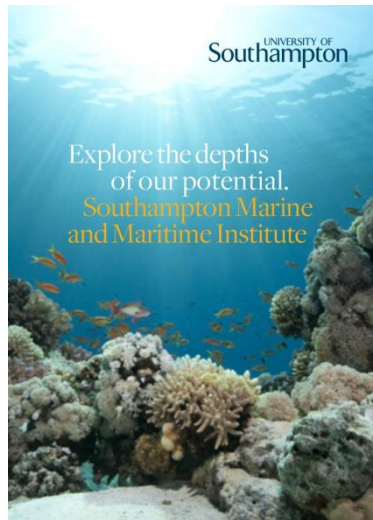
UNIVERSITY OF
Southampton



National
Oceanography Centre
NATURAL ENVIRONMENT RESEARCH COUNCIL



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Hampshire
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SOUTHAMPTON BOAT SHOW

16-25
SEPTEMBER
2016



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Hampshire
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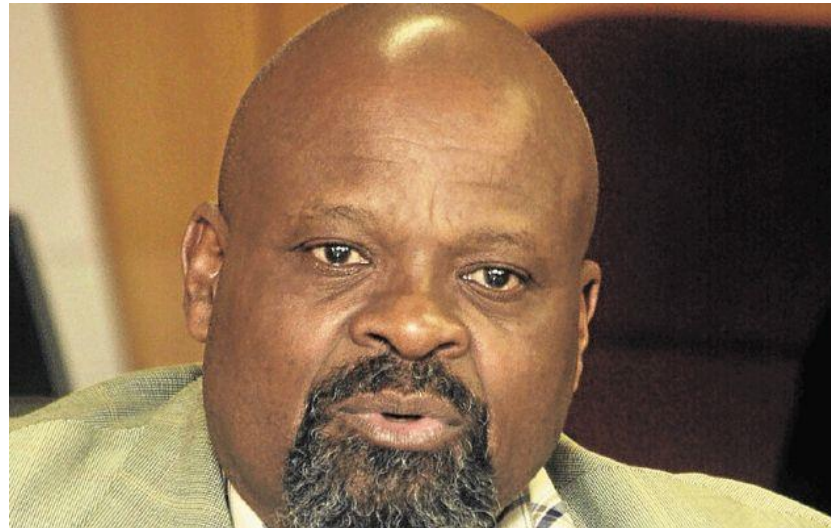
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 **Farnborough**
INTERNATIONAL
AIRSHOW
11-17 JULY 2016



REPUBLIC OF SOUTH AFRICA



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British American Business





enterprise **m3**
GROWTH HUB
LET'S TALK GROWTH

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What do businesses want?

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Strategic approach

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Greater engagement with and accountability to businesses





Desired culture and ethos



Where now?

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Inward Investment and Trade



Programme co-funded by the
EUROPEAN UNION

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Department for
International Trade



Hampshire
County Council



SURREY
COUNTY COUNCIL

enterprise **m3**



Hampshire
County Council

Alternative delivery models

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Greater Manchester's Governance





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Food And Drink In Hampshire

Discover Hampshire
Your official guide





Hythe Pier



You are here > Explore > Coast

Coast



The [country parks](#), nature reserves and open spaces of Hampshire's Solent coastline provide a welcome retreat for walkers and nature lovers, but there's also plenty to see and do.





17 77
HALL & WOODHOUSE

THE
JOLLY
SAILOR

SAILOR

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CAREER AREAS

+ SHARE

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Career Areas

Boeing is a company of bold innovators and dreamers. We are continually looking for ways to build it bigger, smarter, faster, stronger and better. Join us and you can speed up airplane production. Develop innovative cybersolutions. Or shape a global supply chain. Find your future with us by learning more about what we do.

Thank you

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