



**HARDISTY JONES
ASSOCIATES**

EXECUTIVE SUMMARY

Demand Case Update: Salisbury District Hospital HEAT Site

November 2023



Executive Summary

- i. The Salisbury HEAT project is a proposal for a mixed-use development of the Salisbury District Hospital site to include health, education and technology (HEAT) activities alongside the development of the core hospital buildings. The purpose of this redevelopment proposal is to build a critical mass of complementary functions around the hospital to strengthen its long-term future. This aligns with the emerging Wiltshire Council Local Plan, which includes facilitating the regeneration of the District Hospital site to underpin its key role as a university-level skills provider for Salisbury, as well as national priorities to develop research and innovation expertise.
- ii. A partnership between the Salisbury NHS Foundation Trust (SFT) and Salutem Developments is seeking to deliver:
 - Development of the core hospital buildings;
 - Delivery of education and training for healthcare and related activities;
 - R&D and innovation activity in the life sciences and medtech sectors; and
 - Ancillary accommodation provision to support the above operations.
- iii. HJA has been appointed by the partnership to set out evidence of the need and demand for the proposed uses at the Salisbury District Hospital HEAT site. The evidence presented considers:



Healthcare and Related Education and Training

Current Activity

- iv. SFT already delivers a range of on-site education and training at Salisbury District Hospital and has partnerships with a number of colleges, universities and private training providers. The extent of these has increased over recent times. There are opportunities to deliver increased activity to meet the needs of SFT and the wider health and social care sector. However, this activity is currently constrained, with the existing estates provision not fit for purpose and a need for additional capacity has been identified.

Policy Drivers

- v. The national policy position for the healthcare sector is focused on a significant increase in training and recruitment of new domestic (as opposed to international) staff, as well as significant improvements in training and retention of existing staff. The Gloucestershire, Swindon and Wiltshire Area Review highlights that the health and social work sector is forecast to be one of the sectors with the greatest requirement for new labour supply in the Swindon and Wiltshire LEP area over the coming years.
- vi. The local, regional, and national policy position is focused on developing training and education capacity within the healthcare sector, particularly in terms of higher-level skills.
 - The emerging Wiltshire Council Local Plan includes facilitating the regeneration of the District Hospital site and to underpin its key role as a university-level skills provider for Salisbury.
 - The Gloucestershire, Swindon and Wiltshire Area Review recommends the development of a broader higher education offer that encourages progress beyond level 3.
 - The Local Skills Report also prioritises the delivery of more higher education learning opportunities.
- vii. In support of these policy positions, there are opportunities for SFT to expand its existing on-site activity as well as to develop its partnerships with colleges, universities and training providers; including through models such as 'hub and spoke'¹ delivery, and/or by progressing towards university hospital status.

Demand Drivers

- viii. There are a range of drivers influencing the need for significant growth in training and education provision in the health and social care sectors, particularly through further and higher education:
 - The significant forecast growth in health and social care employment;
 - The continued turnover in the health and social care workforce;
 - Changing delivery models of care, in particular in response to ageing populations and digital technology; and

¹ A 'hub and spoke' model in this case would involve an established university (as the 'hub') situating teaching and learning resources at one or more alternative 'spoke' campuses. This would involve resourcing 'spoke' locations with university staff, both clinical and teaching. Use of the phrase 'hub and spoke' in this report should not be confused with healthcare system models for either the delivery of medical student placements, or the delivery of care to patients.

- Changing delivery models in health and care education and training.
- ix. The need for increased education and training opportunities is compounded by the existing shortfall of new entrants into health and social care (and related) roles. This exists at a national level, but the need is even more acute at the Wiltshire level. Growth in employment in the health and social care sector in Wiltshire is behind the national rate. The population of Wiltshire is older than the national average, and this is set to increase over the coming decades. The need for further investment and growing employment in the health and social care sector will therefore be particularly acute in Wiltshire. Training and improved career progression opportunities have been indicated as a route to attracting and retaining staff in the sector.
- x. There are wider constraints on training capacity locally, both within the local NHS system and Wiltshire College. The college's Salisbury campus will reach capacity following its current redevelopment phase. Therefore, any further expansion in the college's activities would require new accommodation at a different location.

Need and Opportunity

- xi. SFT already has partnerships with a number of universities including Bournemouth, Winchester, Southampton and Portsmouth as well as FE colleges and private training providers. Many more partnerships have been established in recent times to support the delivery of Apprenticeships. There are opportunities to develop these partnerships, as well as exploring linkages with other institutions in order to expand the role of the Salisbury Hospital campus in delivering and supporting higher level skills training and development. This could also include the emerging Academy as part of the BSW² Integrated Care System and linkage to the Swindon Institute of Technology (IOT). The exact nature of how these partnerships will develop over time is uncertain, but without capacity to develop activity there is very limited potential to enhance the existing offer given current capacity and accommodation constraints.
- xii. A memorandum of understanding has been signed by SFT with both Wiltshire College and Coventry University to work collectively to improve the range of education provision in Wiltshire. Significant progress has been made and the first cohort to enrol on the new nursing associate programme³ are expected to commence in September 2024. The plan is to extend non-traditional education pathways across Salisbury and south Wiltshire with the development of a health and care zone. Coventry University will work with Wiltshire College to develop further course structures to meet local employer needs and contribute towards local economic strategy aims.
- xiii. There is, therefore, a need to deliver flexible modern education and training facilities. The exact scale and mix will be defined in due course, but new and recent examples of similar developments within hospital campuses, such as at Swansea, Exeter and Glasgow, provide helpful indications of the likely typology. These all demonstrate the mixed-use and collaborative nature of facilities providing:
- Education and training provision including specialist medical and clinical training spaces;

² Bath & North East Somerset, Swindon and Wiltshire

³ These are relatively new roles introduced to bridge the gap between registered nurses and health care support worker.

- Innovation and R&D space including lab space;
- Meeting and conference facilities;
- Breakout space and catering facilities;
- Incubation support; and
- Opportunities for academic, NHS and industry collaboration.

R&D and Innovation Employment Workspace

Current Activity

- xiv. SFT is one of the top performing small acute trusts for research in the country⁴ delivering research projects across 30 specialties. SFT currently hosts National Institute for Health Research (NIHR) portfolio projects with a wide range of University partners, contributing directly to saving lives and improving patient outcomes. The research arm of SFT has indicated that the proposed employment and innovation provision presents an exciting opportunity to further the research work of the Trust.
- xv. Workspace capacity is one of a number of limiting factors that means not all research opportunities can be brought forward. It has been indicated that there is scope for further growth in research activity at SFT if constraints can be overcome.
- xvi. There is a small amount of ongoing collaboration between the Trust and wider industry – the success of OML (Odstock Medical Ltd) and My Trusty Skincare is evidence that innovative spin-out companies can be commercially successful through working in association with SFT. A review of relevant case studies suggests that locating employment and innovation workspace alongside a hospital and higher education can result in significant spin-out activity, far exceeding the current research output at SFT.

Policy Drivers

- xvii. The UK Science and Technology Framework, Life Sciences Vision, and the Swindon and Wiltshire Local Industrial Strategy all highlight the importance of the contribution of the life sciences⁵ (medtech⁶, pharmaceuticals, and biotech⁷), and healthcare⁸ sectors to the national and local innovation agenda. There are significant potential opportunities for the NHS to engage in many aspects of the innovation agenda by driving the growth of successful life sciences companies in the UK, which will, in turn, help to transform the service itself. In order to facilitate transformation, the NHS will need to act increasingly as a partner and collaborator with industry so that together they can devise ways of managing early adoption of innovation as well as deliver the economic benefits of commercialisation.

⁴ Salisbury NHS Foundation Trust (undated) Research Performance Report 2020/21 Source: <https://www.salisbury.nhs.uk/wards-departments/departments/research-development/> [Last accessed 01/11/23]

⁵ Medical research and development (including biotechnologies); and manufacture of pharmaceuticals and medical treatment machinery (ONS, 2015) [Found at: <https://www.ons.gov.uk/businessindustryandtrade/business/businessinnovation/articles/londonanalysis/2015-02-13/2015-02-13>] [Last accessed 09/11/23]

⁶ Manufacture of medical, electromedical, electrotherapeutic, dental and irradiation equipment, and manufacture of optical precision instruments (ONS, 2015)

⁷ Biotechnology research and development (ONS, 2015)

⁸ Includes the provision of health and social work activities. It covers a wide range of activities, from health care provided by trained medical professionals in hospitals and other facilities, to residential care activities that still involve a degree of health care activities, and social work activities not involving the services of health care professionals (ONS)



- xviii. Over the coming decade, the NHS will move towards a 'digital first' care model for most patients. This wholesale shift across the NHS will drive up the need for research and innovation to take place in the life sciences, healthcare and medtech sectors.

Demand Drivers

- xix. The Salisbury and wider south Wiltshire area is renowned for its life sciences expertise. The life sciences sector (including biotech, pharmaceuticals, medtech and healthcare) in Salisbury⁹ has a very high concentration of jobs, five times higher than the national average. It is also growing, with employment in the sector increasing significantly since 2016, at a higher rate (32%) than the national average (26%)¹⁰.
- xx. Porton Science Park is a key employment site in Wiltshire's portfolio given its significant contribution to the life sciences agenda. It is a high-value exceptional site due to activities that are of national and global importance. However, for reasons of national security there are strict entry criteria at the site which means many potential investments cannot be accommodated.
- xxi. Wiltshire Council has reported a range of unfulfilled enquiries from companies in the life sciences sector due to a lack of appropriate accommodation. This includes enquiries from the UK and overseas. These were cited as primarily for office and/or laboratory facilities, ranging from 50sqm to 300 sqm. The recently opened second phase building at Porton Science Park is reported to be fully occupied by April 2024, within a year of opening. It was reported by local economic development officers that investment restrictions at Porton Science Park have led to potential occupants needing to find life-sciences related accommodation outside of Wiltshire.
- xxii. The Wiltshire Employment Land Reviews (ELRs) from 2018 and 2023 present evidence of an ongoing lack of suitable and available sites and premises to meet forecast demand across Wiltshire. Salisbury lies within the A303 FEMA (Functional Economic Market Area) where a lack of employment land supply was identified in both the 2018 and 2023 ELRs. The latest ELR also states there is a lack of R&D employment space in the A303 FEMA.
- xxiii. Policy 35 of the Regulation 19 Wiltshire Local Plan¹¹ sets out the policy relating to Salisbury Hospital and the adjoining land. This policy supports the delivery of the Salisbury HEAT proposals.

Need and Opportunity

- xxiv. There is potential to expand the R&D and innovation activity of SFT if capacity constraints can be overcome. There is a further opportunity to build critical mass, with clear demand from life science companies to occupy floorspace within south Wiltshire that cannot be located at Porton Science Park.
- xxv. In combination, the proposed employment and innovation workspace at the hospital campus provides an excellent opportunity to develop a second health and life sciences and

⁹ Defined here as the Salisbury Travel to Work Area, 2011-based (ONS)

¹⁰ Caution must be applied to the interpretation of Business Register and Employment Survey data at smaller geographies – such areas are more prone to fluctuations, and are more impacted by localised factors e.g. localised data would be much more impacted by the closure of a single SME or large business in a given sector, for instance.

¹¹ Wiltshire Council (2023) Wiltshire Local Plan: Pre-submission Draft 20230 – 2038 (Regulation 19)

engineering based R&D and innovation hub within the Salisbury area. Representatives from both Wiltshire Council's economic development team and Swindon and Wiltshire LEP indicated clear support for the prospect of employment space targeted at meeting the needs of the life sciences and healthcare sectors as an alternative and complementary campus to Porton Down.

- xxvi. There are a number of case study precedents, such as Accelerator (Royal Liverpool and Broadgreen University Hospitals), Cardiff Medicentre (University Hospital of Wales), and The BioHub (Birmingham) that indicate this co-location and collaboration concept has worked successfully elsewhere in the UK, and presents an opportunity for a further step-change in the growth of south Wiltshire's life sciences cluster.

Accommodation

Current Activity

- xxvii. There is currently limited provision of shared housing for Salisbury District Hospital staff, and 48 bedrooms for students at the Salisbury Hospital site.

Policy Drivers

- xxviii. The policy for increasing both the training and retention of healthcare staff, and providing higher-level education is set out above.
- xxix. The Regulation 19 Local Plan states that the objective of Plan is to meet the objectively assessed needs for housing in the area and ensure a supply aligned to jobs growth.

Demand Drivers

- xxx. Housing is less affordable in Wiltshire than in England as a whole. Data compiled by Lichfields shows that housing close to Salisbury District Hospital is unaffordable to those working for the NHS in Band 4 and 5. Similarly, rents in the area are unaffordable to those working in Band 4 and only affordable to those on the highest pay points in Band 5. Increased recruitment of staff in these pay bands will require the provision of suitable and affordable accommodation to allow them to live and work in the area.
- xxxi. Nursing associate training will be the first education programme introduced as part of expanded education provision at the Hospital. Trainees in this programme would be in Pay Band 3, increasing to Band 4 once qualified. Accommodation, particularly rental accommodation which would likely be favoured by students, is currently unaffordable to those in these pay bands. Rooms available for rent would not be defined as affordable to those in Band 3 however, would just meet the threshold for affordability for those in Band 4.

Need and Opportunity

- xxxii. There is a need to provide affordable accommodation for those that come to work and train at Salisbury District Hospital. The proposal for key worker/student accommodation would meet the needs of current and future healthcare workers in the area. This will facilitate Salisbury District Hospital in meeting their current and future workforce requirements, as well as meeting their wider education and training ambitions.

Conclusions

- xxxiii. This report has considered the evidence underpinning the potential demand for the proposed health, education, and technology (HEAT) activities alongside the development of the core hospital buildings.
- xxxiv. The emerging proposals to deliver additional provision for education and training at Salisbury District Hospital site offers the potential to:
- Overcome existing local capacity constraints, particularly on-site constraints for the delivery of education and training activity;
 - Create a platform to develop and strengthen new and existing partnerships between SFT, universities and other institutions, including through models such as ‘hub and spoke’ delivery, or by exploring the opportunity to progress towards University hospital status. This would enhance the offer of university-level education on the hospital site in accordance with the emerging Local Plan, increasing higher education provision in Wiltshire in accordance with the LEP Skills Plan and Gloucestershire, Swindon and Wiltshire Area Review; and
 - Contribute to meeting national (NHS Long Term Plan and NHS People Plan) strategic priorities within the NHS and the potential needs of the emerging BSW Academy.
- xxxv. The emerging proposals to deliver employment and innovation workspace at the Salisbury District Hospital site offers the opportunity to:
- Make a significant contribution to Salisbury’s employment land requirement over the Local Plan period;
 - Establish an alternative, and much needed complementary campus to Porton Down, thereby strengthening south Wiltshire’s life sciences cluster; and
 - Improve linkages with universities, potentially through university hospital status, providing opportunities for enhanced levels of R&D and spin-out activity emerging from collaboration between the NHS, academia, and industry, capitalising on national, sub-regional, and local policy aspirations.
- xxxvi. The emerging proposals to deliver key worker and student accommodation at the Salisbury District Hospital site offers the opportunity to:
- Meet the housing needs of current and future staff at the hospital; and
 - Meet the accommodation needs of students engaged in the expanded education and training at the hospital.
- xxxvii. Due the existing constraints on the site, without an allocation for flexible education, R&D, innovation and employment, and supporting accommodation at the hospital campus the potential to capitalise on the opportunities identified will be lost.



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