Coventry & Warwickshire
Strategic Employment Land Study

Final Report

October 2014

ATKINS

Plan Design Enable

CWLEP Coventry & Warwickshire Local Enterprise Partnership

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1. Introduction

Background and objectives

1.1. Atkins was commissioned in November 2013 by the Coventry and Warwickshire Local Enterprise Partnership (CWLEP) to undertake a Strategic Employment Land Study. The purpose of the study was to provide a robust evidence base and associated policy recommendations to assist in the preparation of CWLEP's Strategic Economic Plan and to also provide evidence for the local authorities within the CWLEP area to inform the preparation or revision of each Council's Local Plan.

1.2. The six local authorities within the CWLEP area are:

- Coventry City Council;
- North Warwickshire Borough Council;
- Nuneaton and Bedworth Borough Council;
- Rugby Borough Council;
- Stratford-on-Avon District Council; and
- Warwick District Council.

1.3. The core objectives of the study were to:

- Undertake a gap analysis and quality check of existing Employment Land Studies;
- Assess the future employment land needs of the sub-region by considering a range of demand scenarios;
- Consider the need for one or more employment sites of strategic significance; and
- If a need for such site(s) is identified, assess the suitability of potential sites and provide appropriate recommendations.

Coverage

1.4. The study is concerned primarily with employment land and premises that fall within the "B-class" of the Town and County Planning (Use Classes) Order 1987 (as amended). Specifically the Use Classes Order identifies the following categories for employment land within the "B-class":

- Class B1 – Business: use for all or any of the following purposes:
  - B1a - as an office other than a use within Class A2;
  - B1b - for research and development of products and processes; and
  - B1c - for any industrial process, being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.
- Class B2 – General Industrial: use for carrying on of an industrial process other than one falling within Class B1c above; and
- Class B8 – Storage or Distribution: use for storage or as a distribution centre.

Structure

1.5. The structure of the report is as follows:

- Chapter 2 provides a review of existing relevant studies and documents;

- Chapter 3 presents the results of the employment land stakeholder workshop held in January 2014;
- Chapter 4 assesses the future employment floorspace and land requirements in the sub-region over the period to 2031;
- Chapter 5 assesses the potential case for identification of strategic employment sites in the sub-region.
- Chapter 6 considers the supply side position for major sites in the sub-region; and
- Chapter 7 presents the study conclusions and recommendations.

Appendix A sets out the list of stakeholders consulted during the study.

Appendix B contains the findings of the assessment of potential strategic employment sites.

2. Document Review

Introduction

2.1. This section outlines the relevant national and sub-regional policy context and summarises the findings of key documents relating to employment land policy in each of the six local authorities.

2.2. It should be noted that some local authorities have more up to date evidence bases than others and that a wide range of assumptions and techniques has been used to estimate future employment land requirements in each local authority. Furthermore, each local authority has its own plan period for which the employment land analysis has been undertaken. The above mean that the employment land projections identified in previous studies may not be directly comparable with the findings of this study.

Policy context

National context

National Planning Policy Framework

2.3. The National Planning Policy Framework (NPPF) was published in March 2012. The NPPF is a key component of the Government's planning reforms which aim to make the planning system less complex and more accessible while at the same time promoting sustainable growth. The NPPF consolidates all policy statements, circulars and guidance documents into a single, simple Framework.

Using a proportionate evidence base

2.4. The NPPF encourages local planning authorities to ensure their Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics of a given area. This aspect of the NPPF requires local authorities to ensure that their assessment of strategies for housing, employment and other uses are integrated and that they take full account of relevant market and economic signals.

Business needs

2.5. The NPPF states that local planning authorities should have a clear understanding of business needs within economic markets operating in and across their area. Local authorities are also encouraged to work together with other bodies including county and neighbouring authorities, Local Enterprise Partnerships (LEPs) and the local business community when preparing and maintaining a robust evidence base. The NPPF asks local authorities to use this evidence base to assess the requirements for employment land and floorspace and the existing and future supply of land available to meet identified needs.

Duty to cooperate and neighbouring local authorities

2.6. Section 110 of the Localism Act sets out a 'duty to co-operate'. This applies to all local planning authorities, national park authorities and county councils in England and to a number of other public bodies. The new duty:

- relates to sustainable development or use of land that would have a significant impact on at least two local planning areas or in a planning matter that falls within the remit of a county council and requires that councils set out planning policies to address such spatial issues;
- requires that councils and public bodies 'engage constructively, actively and on an ongoing basis' to develop strategic policies; and
- requires councils to consider joint approaches to plan making.

2.7. The NPPF identifies the strategic issues where co-operation might be appropriate, including the provision of major retail, leisure, industrial and other economic development uses across a travel to work area. Paragraphs 178-181 of the NPPF provide further guidance on 'planning strategically across local boundaries', highlighting the importance of joint working to meet development requirements that cannot be wholly met within a single local planning area through either joint planning policies or informal strategies such as infrastructure and investment plans.

National Planning Practice Guidance

2.8. The National Planning Practice Guidance was originally launched in August 2013 as a web-based resource for planning practice guidance that was developed following the recommendations of the External Review of Planning Practice Guidance (the Taylor Review). Following a period of testing and comment it was finalised in March 2014. Given that the portal is now a 'live' document, the guidance presented in this section is correct at the time of writing.

Assessing need

2.9. In assessing economic development needs local planning authorities should:

- Identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development;
- provide a breakdown of that analysis in terms of quality and location; and
- provide an indication of gaps in current land supply.

2.10. According to the Guidance, the assessment of development needs should be an objective appraisal of need based on facts and unbiased evidence. No constraints should be applied to the overall assessment of need, such as limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints. However, these considerations should be addressed when bringing evidence bases together to identify specific policies within development plans.

2.11. The Guidance states that there is no one methodological approach or use of a particular dataset(s) that will provide a definitive assessment of development need. The approach used to assess need should be thorough however and should consider need at the functional economic market area (FEMA) level. There is no standard approach to defining FEMA boundaries but Local Enterprise Partnership areas are identified as an important factor in defining them.

2.12. Economic development assessments should consider a range of factors including the current supply of employment land (including recent trends in terms of losses and gains), market intelligence and forecasts of future requirements.

Assessing land availability

2.13. The assessment of land availability should identify a future supply of land which is suitable, available and achievable for housing and economic development uses over the plan period. The guidance encourages carrying out land assessments for housing and economic development as part of the same exercise, in order that sites may be allocated for the use which is most appropriate.

2.14. The assessment should form a key component of the evidence base to underpin policies in development plans for housing and economic development, including supporting the delivery of land to meet identified need for these uses. The assessment results should enable the selection of sites to be taken forward into local authorities' development plan documents to meet objectively assessed needs.

2.15. The geographical area covered by the assessment should be the housing market area and functional economic market area. This could be the local planning authority area or a different area such as two or more local authority areas or areas covered by the Local Enterprise Partnership. The Guidance states that plan makers should be proactive in identifying as wide a range as possible of sites and broad locations for development and should issue a call for potential sites and broad locations for development (something the sub-region has recently undertaken).

2.16. The assessment of potential sites / locations for development should consider a range of factors including accessibility, infrastructure, appropriateness and market attractiveness, contribution to priority regeneration areas, the delivery record of the developers or landowners putting forward sites and whether the planning background of a site shows a history of unimplemented permissions.

The Plan for Growth, HM Treasury and BIS, March 2011

2.17. The Plan for Growth outlines the Government's plan for Britain's sustainable, long-term economic growth. Its ambitions and measurable benchmarks include:

- Improving the UK's ranking in major international indices of competitiveness;
- An increase in the proportion of planning applications approved and dealt with on time;
- Ensure the UK remains one of the top destinations for foreign direct investment;
- An increase in private sector employment, especially in regions outside London and the South East; and
- Increased investment in low carbon technologies.

2.18. Key national growth sectors listed in the Plan as identified in the first phase of the Growth Review include:

- healthcare and life sciences;
- advanced manufacturing;
- construction;
- digital and creative industries;
- retail;
- professional and business services;
- the space industry; and
- tourism.

2.19. The Plan states that low levels of housing completions and limits on land supply create barriers to mobility and high costs of entry for firms coming to the country. Furthermore, it highlights that job creation and international competiveness will be boosted by a powerful presumption in favour of sustainable development, opening up more land for development while retaining existing controls on greenbelt land.

Sub-regional context

CWLEP 5-Year Strategy 2011-2016

2.20. The 5-Year Strategy outlines the LEP's focused plan for achieving its vision over the period 2011-2016. The vision is for Coventry and Warwickshire to be regarded as one of the best and easiest places in the country to establish, run and grow strong and successful businesses, generating significant new employment and skills opportunities in the area.

2.21. A key priority is the creation of new jobs, focusing more on knowledge intensive sectors in order to remain competitive at an international level. The strategy identifies the following as target sectors for Coventry & Warwickshire:

- Advanced engineering and high-value manufacturing;
- Automotive and low carbon mobility;

- Business & professional services;
- Computing & gaming;
- Creative & cultural industries;
- Low carbon technologies;
- Sustainable construction; and
- Tourism.

2.22. A number of key expected growth sectors already have a strong presence in the Coventry & Warwickshire area and the Strategy stresses the importance of building on the sub-region's strengths to achieve further growth. A priority objective of particular relevance to this study is to ensure the sub-region has the relevant sites, premises and infrastructure provision to support the growth of the key target sectors.

Coventry and Warwickshire City Deal

2.23. The City Deal confirms the important role of the advanced manufacturing and engineering (AME) sectors, particularly the automotive sector in which the sub-region has more than five times the average concentration of employment. The advanced manufacturing and engineering sectors are also seen as key foundations for the future success of Coventry and Warwickshire with high rates of forecast growth over the next 10-15 years.

2.24. However, the City Deal also recognises that further growth in these key sectors is being impeded by a series of barriers including the availability of appropriate employment sites. It seeks to tackle these barriers in order to deliver:

- Over 15,000 new jobs by 2025, including 8,800 in the advanced manufacturing and engineering sector;
- Growth in 450 advanced manufacturing and engineering companies within the local area;
- Some £25m of local and national public sector investment; and
- Over £67m of private sector investment.

2.25. In accordance with the NPPF's intention to simplify the planning system and promote and accelerate development and growth the City Deal aims to improve the efficiency of the planning process by providing:

- A fast-track planning service for the AME sector;
- Zero costs for pre-application advice sought by SMEs within the AME sector;
- A sub-regional spatial planning approach that provides a pipeline of suitable, available and deliverable sites.

CWLEP Strategic Economic Plan

2.26. Published in March 2014, the Strategic Economic Plan (SEP) presents CWLEP's vision for the sub-region as a recognised global hub in the advanced manufacturing and engineering (and associated) sectors, with business and research links across the world. Building on its key strengths including its strategic location, productive employment sites and skilled workforce, Coventry and Warwickshire will be a high performing economy able to compete internationally while providing more and better paid employment opportunities for its residents.

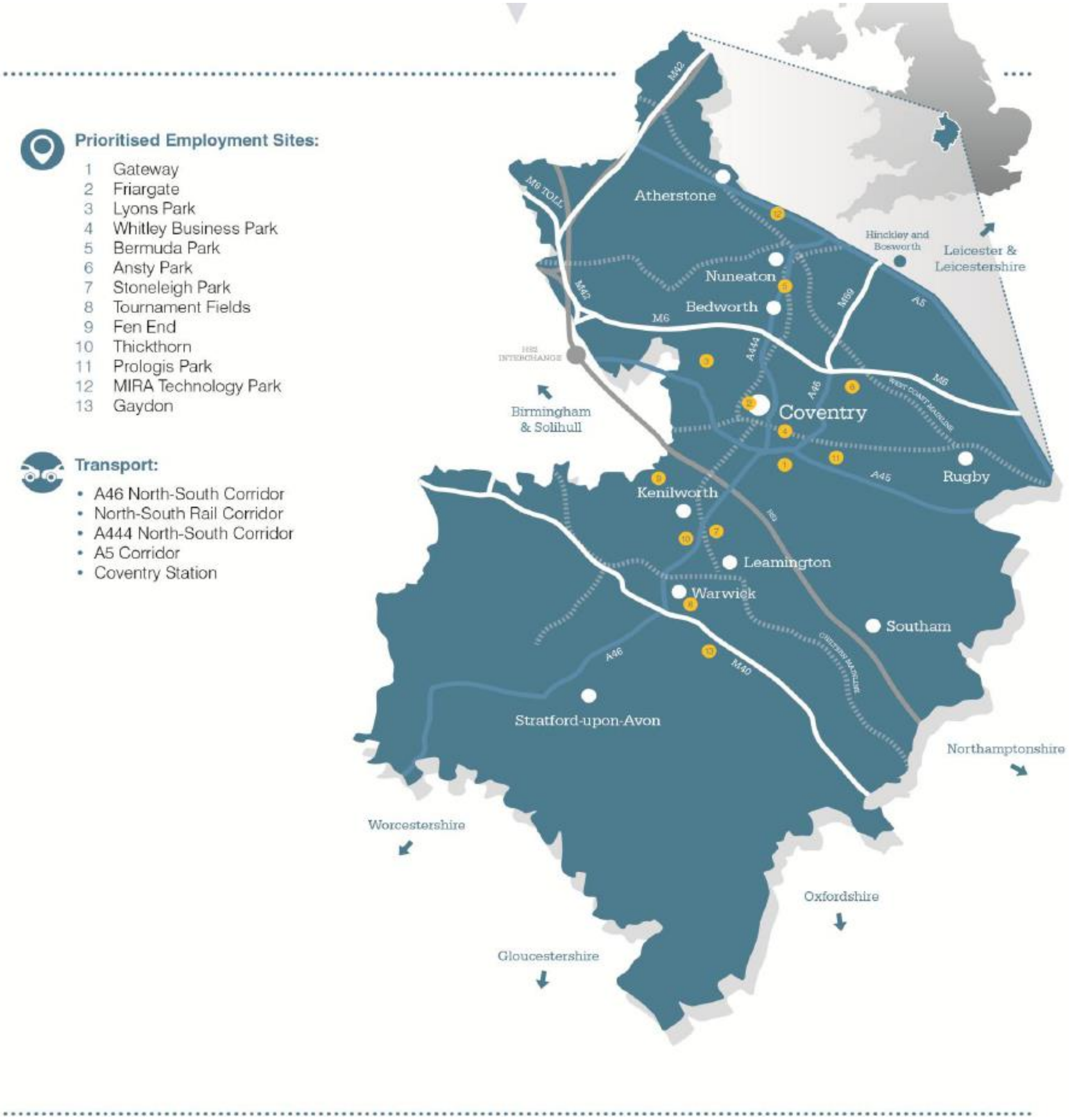
2.27. Advanced Manufacturing and Engineering (AME) and particularly Automotive Technologies are identified as the foundations of CWLEP's Strategic Economic Plan. The SEP's vision includes increasing direct AME employment by nearly 9,000 people and annual AME-related GVA by an additional £745m by 2025. The SEP states that CWLEP will work with the private sector to support growth and employment by increasing the sub-region's AME asset base in terms of site availability, necessary infrastructure and enhanced connectivity.The Strategic Economic Plan includes CWLEP's commitment to develop between 75,000 to 76,000 new homes across the

Coventry and Warwickshire area by 2031. This is in alignment with the findings of the Joint Strategic Housing Market Assessment undertaken in 2013. The SEP states that by 2031 Coventry and Warwickshire will have increased in population by 203,000 people with half of the sub-region's population growth taking place in Coventry. The prioritised geographical areas for investment and other support include:

- Transport Corridors: The A46 (from M40 Junction 15 to M6 Junction 2), A444 (from Coventry to Nuneaton), A5 (In North Warwickshire and Nuneaton and Bedworth) and the rail corridor from Warwick and Leamington Spa to Nuneaton via Coventry.
- Key Urban Centres: Warwick/Leamington Spa, Kenilworth, Coventry, Nuneaton/Bedworth, Stratford-upon-Avon and Rugby.
- Universities: Coventry University, University of Warwick.

2.28. The provision of quality infrastructure including employment sites, digital connectivity and transport connectivity are seen as prerequisites to continued economic success and unlocking future growth potential. The availability of employment sites in particular is described as fundamental to attracting new investors, retaining local businesses and 'bringing manufacturing home'. CWLEP's prioritised portfolio of sites includes Ansty Park, Bermuda Park, Coventry and Warwickshire Gateway, Friargate, Lyons Park, Prologis Park (Ryton), Stoneleigh Park, Thickthorn, Whitley Business Park and Tournament Fields (Figure 2-1).

Figure 2-1 CWLEP Prioritised Portfolio of Sites



Source: CWLEP Strategic Economic Plan, March 2014.

2.29. Strategically located near Coventry Airport and the intersection between three of the four priority corridors (A444/A45/A46), the Coventry and Warwickshire Gateway site is identified as the priority employment site for the delivery of the LEP's economic plan. The SEP highlights that the Gateway site is the largest potential readily-available employment site in the CWLEP area (121ha) and without its development, the CWLEP will be unable to meet its expected employment growth in the period to 2030 (94,500 jobs). If fully developed, the site could accommodate around 10,000 jobs by 2030 and 408,000 sq m of B1, B2 and B8 floorspace.

Policy implications

2.30. The Plan for Growth, National Planning Policy Framework and National Planning Practice Guidance set out the Government's priorities for supporting sustainable economic growth, creating jobs and maintaining the UK's leading competitive position in the world economy. They also outline how the planning system will support economic development. There is an explicit presumption in terms of sustainable development that will create new employment opportunities and meet the needs of businesses. Advanced manufacturing, digital industries and healthcare and life sciences are identified among the national key growth sectors and this is of particular relevance to Coventry and Warwickshire because of its strength in advanced manufacturing and engineering and research and development. Planning policy highlights the need for cross-border co-operation between local planning authorities and the need to assess economic needs at the functional economic market area level (such as Local Enterprise Partnership areas).

2.31. At the sub-regional level, the Local Enterprise Partnership has a clear focus on job creation, retaining and growing existing businesses, attracting inward investment and keeping Coventry and Warwickshire competitive at the national and international levels. Advanced engineering, high-value manufacturing, low carbon technologies and digital innovation sectors are identified as some of the sub-region's key target sectors with a particular emphasis on advanced manufacturing and engineering and automotive technologies. CWLEP considers the availability of employment sites as fundamental to attracting new investors and retaining and growing local businesses. It is also a crucial factor for the reshoring of manufacturing jobs back to the UK.

2.32. Coventry's projected population growth (which will account for 50% of the sub-region's total population growth) makes it a priority area for the provision of new employment opportunities and the Coventry and Warwickshire Gateway site is identified in the SEP as the priority employment site that is of critical importance to the realisation of the sub-region's economic growth objectives.

Existing employment land studies

Coventry City Council

Coventry's Economy: Employment Land Requirements Update January 2012

2.33. The paper states that between 1991 and 2011, a total of 240 hectares of B-Class employment development was completed, at an average of 12 hectares per annum. It also states that the best available evidence around the supply of land at the time of writing is contained within the 2011 Annual Monitoring Report which identifies that:

- 123 hectares of employment land was available in Coventry; of which
- 9 hectares was constrained so not readily available; and
- 3 hectares was under construction.

2.34. In terms of future employment land requirements during the Coventry Core Strategy Plan period, the paper tests a range of employment land demand scenarios and identifies the most plausible scenarios as being those based on the projections of the Strategic Housing Market Assessment, which result in additional employment land requirements ranging between 84 ha and 180 ha. The paper does not make it clear however what figure should be used as the basis for planning future employment land policy.

2.35. The assessment of future employment land requirements is based on plot ratios of 65% for city centre B1, 51% for other B1 and 40% for B2 and B8. These plot ratios are in line with the ones used for this study.

Review of Existing Employment Sites 2012

2.36. The review paper was based upon the findings of a detailed visual survey and assessment of every employment site in Coventry. The survey assessed a total of 86 sites accounting for 800 ha of employment land. Large sites of at least 20 ha accounted for 17% of all sites and 64% of all employment land, highlighting the importance of large employment sites to Coventry's economy.

2.37. The review assessed the supply of employment land as being of relatively good quality. However, approximately 38% (or 197 ha) of assessed land was assessed to be of below average or low overall quality. The paper recommended that, in order to retain a balanced local economy, Coventry will need to protect a range and choice of sites.

North Warwickshire Borough Council

North Warwickshire Employment Land Review Update, September 2013

2.38. The recently published Employment Land Review Update for North Warwickshire, states that the logistics sector (which dominates the local economic structure both in terms of employment and wealth creation) will continue to play a major role in the local and sub-regional economy. In addition to that, the study considers there is a strategic case for actively broadening the business base by tapping into emerging sectors and facilitating further small business growth.

2.39. In terms of future employment land requirements, the forecasts prepared as part of the study indicate that, to support the level and nature of employment growth forecast, there is a demand for between 212 and 410 hectares of employment land. However, these forecasts are based on the land that would be required not only by local business growth but also the continuing desire for national companies to locate within the "Golden Triangle[1]". Therefore, the regional element of demand is capable of being met anywhere across the region rather than specifically in North Warwickshire and should be jointly planned for at the sub-regional and even regional level.

2.40. By disaggregating the local and regional elements of future demand, the study recommends that North Warwickshire Council should make provision for the delivery of 58 ha of employment land over 2011-29 plan period in order to support local employment growth. This is broken down as follows:

- 13 hectares of land for B1 office and R&D uses (B1a/ B1b);
- 12 hectares of land for industrial uses (B1c/ B2)
- 33 hectares of land for land for warehouse / distribution uses (B8);

2.41. The study identifies strong current and future demand for distribution and logistics space and a shortage of supply, both in terms of suitable accommodation and readily available and consented land. Logistics demand consists of national / regional as well as local demand.

2.42. Based on the above future requirements and taking account of completions which have occurred in North Warwickshire (outside of the two RLS) during the period from 2006 to 2012, any currently available supply (extant permissions and allocations) and any sites considered to have limited prospect for future employment use (such as the 40 ha former Baddesley Colliery site), the study concludes that there is a requirement to allocate at least 29 hectares of additional employment land within the North Warwickshire Local Plan in order to meet assessed local needs.

2.43. The study recommended that the Council considers measures and opportunities to encourage office space as an element of mixed-use schemes in accessible locations while focusing the

[1] Defined as the triangle formed by the M42, M6 and M1 Motorways.

majority of future land allocations on meeting local industrial and distribution demands, particularly in respect of small/medium sized suites and modern, quality space suited towards high tech industry.

Nuneaton and Bedworth Borough Council

Nuneaton and Bedworth Borough Employment Land Review, April 2010

2.44. The ELR identified around 290 ha of existing employment land. Allowing for poor quality sites that would not be able to meet future requirements and should be released from the supply portfolio, the existing supply of employment land moving forward was estimated to be around 273 ha. In addition, the identified supply of proposed employment land totalled around 45 ha, reducing to 38 ha after removing undeveloped sites that had been allocated for 15 years or more.

2.45. In terms of future requirements, the total demand for employment land within the borough up to 2026 was estimated to be between 57 ha and 144 ha, depending on the forecasting scenario used. The ELR based its recommendations on the RSS scenario which assumed 11,000 new homes being delivered within Nuneaton and Bedworth.

2.46. The additional employment land requirements (on top of those sites that are already identified in the supply) was estimated to be approximately 36 ha, evenly split between B1a/b, B1c/B2 and B8 requirements.

2.47. The study considered potential sites for locating a Regional Investment Site[2] within the Borough and identified three broad locations which would be suitable to accommodate such a site:

- Judkins Quarry, to the north west of Nuneaton Town Centre;
- Bermuda / Griff on the A444; and
- At Junction 3 of the M6 motorway.

2.48. The study recommended that the local authority should seek to develop an RIS at either Junction 3 of the M6 or in the Bermuda / Griff area.

Nuneaton and Bedworth Borough Plan Preferred Options

2.49. The Borough Plan Preferred Options paper outlines the targets for the amount of new development in the borough over the period to 2028. These include:

- 75 hectares of land for employment;
- 7,900 new homes, including 4,550 homes located on greenfield sites; and
- 30,000 square metres of office space in Nuneaton town centre.

2.50. The Borough Plan Monitoring Report published in April 2013 states that the total land developed over the three years since 2010 amounted to 4 ha. At the time of the Report, there were 19.5 ha of land with planning permission, with 7.5 ha having full permission and 12 ha having outline permission.

Rugby Borough Council

Rugby Borough Council Economic Development Background Paper, April 2010

2.51. The paper tested the 108 ha long term requirement for employment land delivery set out in the Regional Spatial Strategy Phase 2 revision and concluded at a range between 72 ha and 129 ha. This was considered to reinforce the reliability of the RSS2 long term indicative requirement of 108 ha.

[2] The origin of Regional Investment Sites (large, high quality sites) lies in the now withdrawn West Midlands Regional Spatial Strategy.

2.52. After allowing for recent completions, allocated sites and planning permissions, the paper identifies a need for an additional 67 ha of employment land to be allocated in order to meet the 108 ha target over the life of the Core Strategy. This need is proposed to be met with the development of Rugby Radio Station (31 ha) and Gateway Rugby (36 ha).

Rugby Employment Land Review, June 2013

2.53. The ELR focused on reviewing the existing supply of employment sites rather than establishing future employment land requirements (the employment land projections of the Economic Development Background Paper are referenced instead).

2.54. The ELR concludes that all existing sites within the Borough remained active and there were very low vacancy rates within a number of Strategically Significant Employment Sites. The recommended policy provisions for the Local Plan included:

- The protection of existing employment land;
- The conversion of existing buildings in the Green Belt, Countryside and Local Needs Settlements for employment generating purposes;
- The development of small scale proposals in rural areas; and
- The development of Ansty Park.

Stratford-on-Avon

Stratford-on-Avon Employment Land Study, August 2011

2.55. The Employment Land Study published in August 2011 indicated that employment growth within Stratford-on-Avon District over the period 2008-2028 was unlikely to match the levels achieved over the period 1998-2008. In total, employment over the period 2011-2028 was forecast to increase by 6.6% (4,090 jobs). Based on the consideration of a range of employment land need scenarios, the study concluded that it would be appropriate to plan for the provision of 25 ha -30 ha of employment land over the plan period to 2028.

2.56. In terms of supply, the ELS estimated a land supply of 49 ha in the District, consisting of recent completions, vacant plots on existing sites, development pipeline and outstanding allocations. This suggested that land supply was sufficient to meet land demand over the plan period and that there was a potential surplus of land for industrial activities. However, it was recommended that limited additional employment allocations were appropriate to support higher value economic growth in B1a and B1b sectors over the plan period.

Stratford-on-Avon District Proposed Submission Core Strategy

2.57. The Core Strategy highlights the importance of achieving a balance between housing and employment growth in terms of both quantity and location. It proposes the following distribution of employment land to meet the economic needs of the District to 2031 outlined below. Furthermore, 100 hectares of land are being made available to JLR at Gaydon, although not all of this is necessarily going to be within B class usage.

- 10 hectares of additional employment land and 25 hectares for the relocation of existing businesses at Stratford-upon-Avon;
- 19 hectares on the north-eastern edge of Redditch to meet the specific employment needs of Redditch; and
- 14 hectares at the Main Rural Centres of Alcester and Southam.

Warwick District Council

Warwick District Employment Land Review Update, May 2013

2.58. The study assessed the supply of employment land and premises in the District and concluded that existing employment locations were generally performing well with low vacancies in most locations. There was a good range of accommodation, from small, affordable workshops and offices to larger industrial premises and good quality B1 offices on business parks but there was a shortage of good quality modern accommodation of all types and sizes.

2.59. The study initially identified 74.1 ha of employment land supply but after considering the availability, suitability and market attractiveness of each site, the effective supply of land was estimated to be 48 ha.

2.60. The quantitative assessment of employment land need outlined a requirement for the provision of 50 ha - 60 ha of employment land over the 2011 - 2030 plan period. The employment land requirement based on the Cambridge Econometrics employment forecasts was estimated to be 36 ha. In addition to the above, some new employment land provision was also recommended to replace poorer quality sites and to replace employment land which was assessed as being potentially suitable for redevelopment for alternative uses.

2.61. Bringing together supply and demand, the study concluded that in quantitative terms, there was a requirement to identify between 15 ha - 25 ha of additional employment land. This did not take into account the potential impact of development at Coventry and Warwickshire Gateway which would reduce the requirement for employment land provision elsewhere in Warwick District by an estimated 6.5 ha.

Coventry and Warwickshire

Coventry and Warwickshire Joint Strategic Housing Market Assessment (SHMA), November 2013

2.62. The study assessed the housing need for the sub-region and the six individual local authorities over the period 2011-2031 considering population and housing market dynamics, economic growth trends and affordable housing need. The SHMA concluded that provision of between 3,700 – 3,800 homes per annum across the HMA would be appropriate The annual housing need for the individual local authorities was estimated as follows:

- Coventry: 1,040 - 1,180 dwellings
- North Warwickshire: 150 - 175 dwellings
- Nuneaton and Bedworth: 430 - 495 dwellings
- Rugby: 595 - 660 dwellings
- Stratford-on-Avon: 480 - 570 dwellings
- Warwick: 660 - 720 dwellings

2.63. These figures represent housing needs rather than housing targets as they do not take account of land availability and development and infrastructure constraints in different areas. They also do not take account of any potential shortfall in housing provision in other local authorities, within or beyond the housing market area (HMA). For the above reasons, the SHMA recommends that greater weight is ascribed to the HMA-level conclusions.

2.64. Furthermore, the SHMA states that its purpose is to provide a consistent strategic-level assessment of need across the HMA. However, individual local authorities may gather a wider evidence base regarding more local dynamics and issues, including in regard to local economic growth potential, which may provide a basis for refining the SHMA's needs estimates.

2.65. The SHMA does not analyse the employment land implications of the identified levels of housing need but its findings are used to inform the housing growth linked scenario discussed in Chapter 4 of this report.

2.66. An update to the Joint SHMA has been undertaken to take account of the most recent ONS projections. Whilst this could affect distribution of housing need across the sub region (subject to Duty to Cooperate discussions), the impact in terms of the total housing requirement across the housing market area is relatively small and therefore we do not consider that it affects the findings of this study'

Summary of future employment land requirements

2.67. Each local authority has undertaken its own employment land research identifying future employment land requirements, the existing amount of available land and the additional amount of employment land that will need to be provided to meet future need. The review of these documents has not identified any major gaps or shortfalls in the analysis undertaken by each local authority however the following points should be noted:

- Most employment land reviews have considered a range of future demand scenarios but in some cases have not clearly identified what is the preferred scenario that should inform future employment land policy.

2.68. The various employment land studies do not always use a consistent set of assumptions, employment forecasting sources or assessment periods. They have also been undertaken at different points in time and therefore inherently reflect the economic and development outlooks of their respective times. This is understandable but means that direct comparisons between studies should be made with caution.

2.69. Table 2-1 below summarises the future employment land requirements in each local authority according to previous employment land studies undertaken as well as the additional employment land allocations required to meet this future demand.

Table 2-1 Summary of Local Authority Employment Land Reviews

Local authority	Additional employment land demand	New employment land allocations needed	Assessment period
Coventry	84 ha - 180 ha	0 ha – 69 ha	2011 - 2028
North Warwickshire	58 ha	29ha	2011 - 2029
Nuneaton & Bedworth	57.5 ha - 144 ha	36 ha	2006 - 2026
Rugby	108 ha	67 ha	2006 - 2026
Stratford-on-Avon	25 ha - 30 ha	24 ha	2008 - 2028
Warwick	66 ha	15 ha - 25 ha	2011 - 2030
Total[3]	493 ha	211 ha	

Note: The figures above exclude strategic distribution. The North Warwickshire figures have been adjusted downwards to account for this.

2.70. Aggregating the additional employment land requirement of each local authority (taking the midpoint figure where the requirement is presented in the form of a range), the total need across the sub-region is approximately 493 ha. Taking into account the existing supply of available sites (at the time each report was prepared), the total requirement for new employment land allocations across the sub-region was approximately 211 ha.

2.71. It should be noted that there are several limitations in the use of the above figures. As has been previously highlighted, they are based on a number of individual studies undertaken at different points in time using different methodologies, assumptions and forecasting sources. For this reason, they may not fully align with the future requirements analysis presented in Chapter 4 of this report.

[3] The middle point has been used where employment land need is presented as a range.

3. Stakeholder consultation findings

Introduction

3.1. This section summarises the key findings of the stakeholder consultation undertaken as part of this study. A consultation event was held in Leamington Spa in January 2014 to discuss employment land issues including future trends and whether there is a need for additional employment site(s) of strategic significance.

3.2. The consultation event was attended by stakeholders representing local authorities, local businesses, developers and property agents active in the sub-region (the list of organisations attending the consultation event is presented in Appendix A). The purpose of the consultation event was to capture local perspectives on the sub-region's economic growth prospects, challenges and opportunities and their implications for the supply and demand for employment land and premises.

3.3. It should be noted that the consultation feedback discussed in this section reflects the views of the stakeholders that expressed it and does not necessarily coincide with the views of the LEP or the individual local authorities.

Key findings

3.4. A key message coming out of the consultation was that the sub-region is well placed to build on its previous economic success and achieve further economic growth by attracting new businesses and enabling existing businesses to grow. The supply of an appropriate portfolio of employment sites was seen as an important prerequisite for continued economic growth particularly in sectors such as advanced manufacturing, research and development, logistics and sectors that form part of their supply chains.

3.5. Stakeholders said that demand can be split in two general types: local demand for smaller sites and external demand for larger sites. The sub-region is well placed to accommodate national demand in key sectors such as advanced manufacturing and engineering (e.g. automotive and aviation) and logistics.

3.6. Despite the national trend of declining manufacturing activity, this was not felt to be the case in the CWLEP area. There was a feeling that manufacturing is limited by the lack of appropriate employment land and there was consensus that there is a repatriation of advanced manufacturing activity (as a result of higher transport costs and quality control issues) generating strong demand for suitable land and premises.

3.7. Furthermore, advanced manufacturing and engineering have a significant supply chain supporting them and are closely linked to logistics. Some stakeholders felt there are misconceptions regarding the economic value of logistics operations and the number of jobs they generate, especially in terms of the level of automation of large distribution centres. Stakeholders felt that there is a lack of quality grade-A floor space for logistics which means that opportunities to attract new businesses or allow the expansion of current businesses are not fully exploited.

3.8. According to research undertaken by property agents Jones Lang LaSalle, the development of large sub regional sites within Coventry and Warwickshire over the last 20 years has been largely off the back of large big box logistics and this trend is likely to continue as demand is increasing (in terms of both quantity and quality) while supply is diminishing. In 2013, 40% of all take up in the UK was in the Midlands, shared almost equally between East and West. Much of this was in the Golden Triangle, in and around the sub region.

3.9. Internet driven retail is likely to drive a number of different needs over the next 10-20 years in logistics. The growth in home delivery for superstores and multimodal logistics (train, rail and air) means that well connected places will be important for the future economy. However, the existing rail capacity imposes limitations as passenger services take priority over freight services. It was suggested that HS2 will release some rail capacity for the transportation of goods.

3.10. There are opportunities for further growth driven by the local Universities, especially in terms of research and development activities. Coventry University has significant current and future investment plans and Warwick University also has potential for further expansion. If properly planned, there could be considerable opportunities for research development and the further development of economic activity clusters around the universities.

3.11. The local Universities play a key role in providing a highly skilled and qualified work force but shortages in the housing supply are a considerable constraint for the retention of highly qualified and skilled workers. The housing constraints also have an adverse effect on the attraction of inward investors. Linked to the above, some stakeholders felt uneasy about what they considered to be low levels of proposed housing figures in the joint SHMA.

3.12. In terms of the future supply of employment sites, there was general agreement that the sub-region needs to provide choice in the supply of employment sites, including location, size and developer (to allow better competition). Brownfield employment sites that are not viable should be released for other uses and good quality sites should be allocated to meet demand.

3.13. Most stakeholders agreed that the sub-region needs to be ready to respond to the economic recovery by having a good supply of employment sites. It was suggested that large sites are needed to attract big businesses but only a handful of such sites are available at present. It was suggested that 2-3 new sub-regional sites are needed with each site being 20 ha to 50 ha in size.

3.14. It was suggested that there is likely to be a “one-off, once in a decade” request or demand for a very large site employment site but such a site does not currently exist and could be a barrier to bringing a large firm to the area. The sub-region should not only supply smaller sites to meet the needs of local businesses (including business start-ups) but also larger sites that will allow the expansion of existing businesses and the attraction of new businesses from elsewhere in the UK or overseas. As an example, it was suggested that Jaguar’s new plant in Wolverhampton could have been located in the sub-region if the right site had been available.

3.15. It was suggested that the identification of new sub-regional employment sites should not be too specific on use but allow flexibility to accommodate future need. Developers attending the consultation event stated that speculative development is viable at present as there is strong demand for warehousing and high value manufacturing accommodation. Site infrastructure and accessibility were identified as key factors in the selection of any new sites.

Conclusions

3.16. The consultation suggested that the sub-region has significant potential for attracting further investment to stimulate significant economic growth and build on the successful manufacturing, engineering and logistics clusters already located there. The sub-region is strategically located in the heart of the country and has good transport links which are of fundamental importance to many businesses. Future growth opportunities include advanced manufacturing and engineering; logistics and distribution; and research and development activities linked to the expansion potential of the local universities.

3.17. Most stakeholders agreed that the sub-region needs at least one new large site of strategic importance and possibly two or three such sites in order to remain competitive and attract further investment from major British or international companies. It was suggested that these sites should be flexible in their use in order to be able to meet the specific requirements of key businesses, especially in the advanced manufacturing and engineering, logistics and research and development sectors. At the same time, a good supply of smaller sites should be maintained to meet the needs of smaller, local businesses.

4. Future employment land requirements

Introduction

4.1. This section assesses the future employment growth prospects and the resulting demand for employment land and premises by B use class for the LEP and the individual local authority areas. The analysis is based on a number of forecasting techniques and scenarios, including Cambridge Econometrics' employment forecasts and the housing targets identified in the joint SHMA.

4.2. It should be noted that the net projections set out in this chapter are indicative and should not be considered prescriptive. Moreover, given the long-term nature of the projections and the continued economic uncertainty, any forecasting is highly sensitive to changes in the national and international economic climate. It is also noted that all figures presented in this section have been rounded and therefore may not completely add up.

Scenario 1: Cambridge Econometrics base scenario

4.3. The baseline forecasts are based on Cambridge Econometrics' 45 sector employment forecasts to 2025 prepared in August 2013. The employment forecasts were extrapolated to 2031 to cover the same plan period used by most local authorities in the sub-region. Employment figures were converted into full time equivalent (FTE) jobs based on the current split of full-time and part-time employment by sector across the LEP area.

4.4. Employment sectors were mapped to the core B1a/b (offices and research and development), B1c (light industrial), B2 (general industrial) and B8 (storage and distribution) "employment" uses and job numbers were converted to floorspace and land requirements by applying appropriate employment density and plot ratio assumptions. The employment densities used are in line with the HCA's Employment Densities Guide 2nd Edition (2010) while the plot ratios used are in line with the ODPM's Employment Land Reviews: Guidance Note (2004). The employment density and plot ratio assumptions are summarised below.

Table 4-1 Employment Density and Plot Ratio Assumptions

Use class	Employment density	Plot ratio
B1a/b	12 sqm per FTE	50% of site area
B1c	47 sqm per FTE	40% of site area
B2	36 sqm per FTE	40% of site area
B8	70 sqm per FTE	50% of site area

4.5. According to the Cambridge Econometrics forecasts, the number of jobs across all sectors in the LEP area will increase by 21% between 2011 and 2031, an increase of 94,500 jobs or approximately 77,600 FTEs.

4.6. Key growth sectors are projected to include business support services; health; construction; and food and beverage services. The most notable decline is forecast for the education; architectural & engineering services; and public administration & defence sectors. Manufacturing employment is projected to continue to decline, in particular the food & tobacco; electronics; machinery; and printing & recording sectors (Table 4-2).

Table 4-2 Cambridge Econometrics Employment Forecasts: FTE Job Changes in Selected Sectors, 2011-2031[4]

Sector	FTE jobs change 2011-2031	% FTE jobs change 2011-2031
Business support services	17,300	63%
Health	10,600	49%
Construction	10,200	41%
Food & beverage services	10,000	72%
IT services	9,100	79%
Warehousing & postal	7,100	54%
Retail trade	5,800	20%
Food drink & tobacco (manufacturing)	-600	-15%
Electronics (manufacturing)	-700	-69%
Machinery (manufacturing)	-700	-15%
Printing & recording (manufacturing)	-1200	-65%
Public Administration & Defence	-1,400	-10%
Architectural & engineering services	-2,200	-19%
Education	-6,400	-18%
All sectors	77,600	21%

Source: Cambridge Econometrics, Atkins

4.7. FTE employment in B-use class sectors across the LEP area is forecast to increase by 18% between 2011 and 2031, resulting in 34,300 additional B-use class FTE jobs by 2031. Employment growth is forecast to come primarily from B1a/b and B8 sectors while B2 employment is forecast to decline (Table 4.3).

Table 4-3 Scenario 1 - Cambridge Econometrics Base Scenario: LEP Area B Use Class FTE Jobs, 2011-2031

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
B1a/b	115,100	124,600	128,500	133,900	139,100	24,000	21%
B1c	13,600	14,400	14,500	14,700	15,000	1,300	10%
B2	20,000	20,700	20,000	19,800	19,500	-500	-3%
B8	43,000	47,800	49,100	50,700	52,500	9,500	22%
Total B class	191,700	207,500	212,100	219,100	226,100	34,300	18%

Source: Cambridge Econometrics, Atkins

Based on the above employment forecasts and the employment density and plot ratio assumptions summarised in Table 4-1 the LEP area's employment floorspace and land requirements over the period 2011-2031 are summarised in Tables 4-4 and 4-5 below.

[4] Figures for 2026-2031 have been extrapolated from the figures for 2011-2025.

Table 4-4 Scenario 1 - Cambridge Econometrics Base Scenario: B Use Class Floorspace Requirements (sqm), 2011-2031

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
B1a/b	1,380,900	1,495,300	1,542,200	1,606,400	1,668,900	288,000	21%
B1c	640,900	677,100	681,200	691,700	703,100	62,200	10%
B2	719,900	745,700	720,500	712,800	701,000	-18,900	-3%
B8	3,009,200	3,349,000	3,436,100	3,551,500	3,674,300	665,100	22%
Total B class	5,750,900	6,267,100	6,380,000	6,562,400	6,747,300	996,400	17%

Source: Cambridge Econometrics, Atkins

Table 4-5 Scenario 1 - Cambridge Econometrics Base Scenario: B Use Class Land Requirements (ha), 2011-2031

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
B1a/b	276	299	308	321	334	58	21%
B1c	160	169	170	173	176	16	10%
B2	180	186	180	178	175	-5	-3%
B8	602	670	687	710	735	133	22%
Total B class	1,218	1,325	1,346	1,383	1,420	201	17%

Source: Cambridge Econometrics, Atkins

4.8. According to the Cambridge Econometrics base scenario, B1a/b floorspace demand across the LEP area will grow by 288,000 sqm over the period 2011-2031, translating to an indicative increase in B1a/b land demand of 58 ha. Demand for B8 floorspace is forecast to grow by 665,000 sqm over the same period, translating to additional indicative demand for 133 ha of B8 land. Demand for B2 floorspace is projected to decline however, decreasing by approximately 19,000 sqm (5 ha in terms of land) between 2011 and 2031.

4.9. The overall B class floorspace need in the LEP area is forecast to increase by close to 1 million sqm over the period 2011-2031, translating to an indicative additional land requirement of approximately 201 ha. This however assumes that all surplus B2 land will be re-used for B1 and B8 purposes and that all current employment sites will remain in employment use. It is possible that some of the surplus B2 land could be used to accommodate demand in the growing B1 and B8 sectors but it is likely that the poorer quality industrial sites would not be fit for B1 purposes. Furthermore, it is likely that some B use class sites will be lost (or released) to alternative uses over the period to 2031. Therefore, the 201 ha estimate represents the minimum amount of additional employment land the LEP area is likely to need over the period to 2031. It should be noted that these are indicative land estimates which are sensitive to the plot ratio assumptions used to convert floorspace into land.

4.10. The tables below summarise the employment, floorspace and land forecasts for each of the individual local authorities within the LEP area.

Table 4-6 Scenario 1 - Cambridge Econometrics Base Scenario: Coventry

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B1a/b	5,400	14%	65,100	14%	13	14%
B1c	300	7%	14,200	7%	4	7%
B2	-200	-3%	-8,800	-3%	-2	-3%
B8	1,200	11%	86,100	11%	17	11%
Total B class	6,700	11%	156,600	9%	32	9%

Source: Cambridge Econometrics, Atkins

Table 4-7 Scenario 1 - Cambridge Econometrics Base Scenario: North Warwickshire

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B1a/b	3,600	41%	43,100	41%	9	41%
B1c	100	8%	6,700	8%	2	8%
B2	-100	-2%	-2,000	-2%	0	-2%
B8	4,300	52%	299,400	52%	60	52%
Total B class	8,000	37%	347,200	40%	70	38%

Source: Cambridge Econometrics, Atkins

Table 4-8 Scenario 1 - Cambridge Econometrics Base Scenario: Nuneaton and Bedworth

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B1a/b	1,700	19%	20,200	19%	4	19%
B1c	100	9%	5,900	9%	1	9%
B2	0	2%	1,600	2%	0	2%
B8	800	15%	54,000	15%	11	15%
Total B class	2,600	15%	81,700	13%	17	13%

Source: Cambridge Econometrics, Atkins

Table 4-9 Scenario 1 - Cambridge Econometrics Base Scenario: Rugby

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B1a/b	1,900	16%	22,300	16%	4	16%
B1c	600	27%	26,600	27%	7	27%
B2	0	-1%	-900	-1%	0	-1%
B8	1,600	29%	114,600	29%	23	29%
Total B class	4,000	19%	162,500	23%	34	23%

Source: Cambridge Econometrics, Atkins

Table 4-10 Scenario 1 - Cambridge Econometrics Base Scenario: Stratford-on-Avon

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B1a/b	4,300	23%	51,400	23%	10	23%
B1c	100	7%	5,000	7%	1	7%
B2	0	0%	300	0%	0	0%
B8	500	10%	35,300	10%	7	10%
Total B class	4,900	17%	91,900	12%	19	12%

Source: Cambridge Econometrics, Atkins

Table 4-11 Scenario 1 - Cambridge Econometrics Base Scenario: Warwick

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B1a/b	7,200	25%	86,100	25%	17	25%
B1c	100	3%	3,800	3%	1	3%
B2	-300	-8%	-9,100	-8%	-2	-8%
B8	1,100	14%	75,800	14%	15	14%
Total B class	8,100	20%	156,500	14%	31	14%

Source: Cambridge Econometrics, Atkins

Scenario 2: Baseline+ growth scenario

4.11. The baseline forecasts are complemented by a higher-growth scenario developed by Atkins ('baseline+'). This is based on CWLEP's prediction[5] that the City Deal will deliver over 8,800[6] new jobs in advanced manufacturing and engineering (AME) by 2025. This projected growth in advanced manufacturing and engineering is also aligned with CWLEP's Strategic Economic Plan (SEP) and the findings of consultation with key stakeholders that showed the sub-region is well placed to achieve further growth related to advanced manufacturing and engineering, research and development and logistics (please refer to Chapter 3 for a summary of the key consultation results).

4.12. Scenario 2 uses the Cambridge Econometrics base scenario as its starting point but assumes that 629 new jobs will be created in the advanced manufacturing and engineering sectors per year, cumulating to 8,800 new jobs by 2025[7]. Projecting this level of employment growth to 2031 (the assessment period for this study), the total number of new jobs in AME sectors rises to approximately 12,570. This assumes that the significant growth in AME employment will not come to a stop in 2025 but given the sector's momentum and agglomeration effects, it will continue to grow beyond 2025.

4.13. It has been assumed that the split of new jobs in these sectors by use class will be as follows:

- B1a/b – 10%
- B1c – 20%
- B2 – 50%
- B8 – 20%

4.14. This is considered a logical split of advanced manufacturing and engineering employment, with the majority of jobs assumed to be in industrial and light industrial sectors (together accounting for 70% of the 8,800 new AME jobs). The remaining 30% of new jobs is assumed to be in research and development and supporting office and storage/distribution sectors.

4.15. Given that the baseline Cambridge Econometrics employment forecasts suggest an overall decline in B1c/B2 employment, these 8,800 AME jobs can be considered to be net additional and not already included in the Cambridge Econometrics forecasts.

4.16. It should be noted that as the City Deal's employment target is not broken down by employment growth in each of the six local authority areas, the analysis for this scenario is presented at the sub-regional level and consequently, unlike Scenario 1 it is not possible to provide figures for the

[5] Coventry and Warwickshire City Deal, page 1 and CWLEP Draft Strategic Economic Plan, page 17

[6] The CWLEP's City Deal target of 8,800 new AME jobs by 2025, the period covered by the City Deal is based on baseline data and future projections, independently modelled on their behalf by Regeneris Consulting. The four investment programmes at the heart of the SEP and the economic outcomes arising from its delivery plan to continue the AME sector growth beyond the formal end of the City Deal period.

[7] 8,800 new jobs over the period 2011-2025 equates to approximately 629 jobs per year.

individual local planning authorities. Under Scenario 2, FTE employment in B-use class sectors is forecast to increase by 24% between 2011 and 2031, resulting in 46,900 additional B-use class FTE jobs by 2031 across the LEP area (

4.17. Table 4-12).

Table 4-12 Scenario 2 - Higher Growth Scenario: B Use Class FTE Jobs, 2011-2031

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
B1a/b	115,100	124,900	129,100	134,800	140,300	25,200	22%
B1c	13,600	15,000	15,800	16,600	17,500	3,900	29%
B2	20,000	22,300	23,200	24,500	25,800	5,800	29%
B8	43,000	48,500	50,300	52,600	55,000	12,000	28%
Total B class	191,700	210,700	218,400	228,500	238,600	46,900	24%

Source: Cambridge Econometrics, Atkins

4.18. As with Scenario 1, employment growth is forecast to come primarily from B1a/b and B8 sectors but Scenario 2 also forecasts strong growth in research and development (B1c) and manufacturing (B2), in line with the LEP's City Deal aspirations.

4.19. Under Scenario 2, demand for additional employment floorspace will amount to approximately 1.5 million sqm over the period 2011-2031, an increase of approximately 27%. B8 floorspace will account for most of the additional requirement at approximately 841,000 sqm but B1 and B2 floorspace demand is also projected to grow (Table 4-13).

Table 4-13 Scenario 2 - Higher Growth Scenario: B Use Class Floorspace Requirements (sqm), 2011-2031

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
B1a/b	1,380,900	1,499,000	1,549,700	1,617,700	1,684,000	303,100	22%
B1c	640,900	706,600	740,300	780,300	821,300	180,400	28%
B2	719,900	802,300	833,700	882,500	927,300	207,400	29%
B8	3,009,200	3,393,000	3,524,100	3,683,500	3,850,300	841,100	28%
Total B class	5,750,900	6,400,900	6,647,800	6,964,000	7,282,900	1,532,000	27%

Source: Cambridge Econometrics, Atkins

4.20. Based on the above, the indicative additional employment land requirement in the LEP area over the period to 2031 is estimated to be approximately 326 ha (Table 4-14). Much of the additional future need is projected to come from B8 sectors (168 ha) but a balanced mix of demand for B1a/b (61 ha), B1c (45 ha) and B2 land (52 ha) is also projected.

Table 4-14 Scenario 2 - Higher Growth Scenario: B Use Class Land Requirements (ha), 2011-2031

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
B1a/b	276	300	310	324	337	61	22%
B1c	160	177	185	195	205	45	28%
B2	180	201	208	221	232	52	29%
B8	602	679	705	737	770	168	28%
Total B class	1,218	1,356	1,408	1,476	1,544	326	27%

Source: Cambridge Econometrics, Atkins

Scenario 3: Housing-led scenario

4.21. Scenario 3 tests the implications of the labour supply growth projections used in the SHMA on the sub-region's future employment land requirements. The demographic-driven growth in the number of residents in employment between 2011-2031 (called PROJ 1A in the SHMA) and the assessed housing need in each of the local authorities and the LEP area as a whole are summarised in Table 4-15 below.

Table 4-15 Joint SHMA residents in employment and housing need projections, 2011-2031

Area	Growth in residents in employment, 2011-2031 (PROJ 1A)	Assessed housing need, 2011-2031
Coventry	22,579	23,600
North Warwickshire	238	3,500
Nuneaton and Bedworth	5,152	9,900
Rugby	10,582	13,200
Stratford-on-Avon	1,301	11,400
Warwick	8,996	14,400
LEP area	48,848	76,000

Source: Coventry & Warwickshire Joint Strategic Housing Market Assessment (November 2013)

4.22. The SHMA states that the above figures should be regarded as indicative due to the difficulties of accurately forecasting economic growth at a local authority level and the fact that translating demographic growth into housing need is sensitive to a range of factors including changes to employment rates and commuting patterns.

4.23. The limitations of the above figures are particularly evident in the cases of North Warwickshire and Stratford-on-Avon where the identified housing need is significantly higher than the projected growth in residents in employment. For this reason, it is considered best that Scenario 3 is used to test employment land requirements at the sub-regional level only.

4.24. The assumptions used to convert the demographic-driven labour supply growth into employment floorspace and land requirements are summarised in Table 4-16 below.

Table 4-16 Scenario 3 assumptions

Assumption		Source
Growth in residents in employment, 2011-2031	48,848	Coventry & Warwickshire Joint SHMA, November 2013
% of LEP area residents working in the sub-region	82.5%	2001 Census travel to work data (no later data available)
Employment breakdown by land use	Same as Cambridge Econometrics base model	Cambridge Econometrics / Atkins
Split of full/part-time employment in 2031	FTE multipliers: B1a/b: 85%, B1c: 90% B2: 95%, B8: 90%	Based on 2012 (latest available) full/part-time split by sector data, Business Register and Employment Survey, ONS

4.25. Based on the above, the indicative employment land requirement in the LEP area over the period to 2031 resulting purely from these demographic-driven labour supply growth projections is estimated to be approximately 115 ha.

Table 4-17 Scenario 3 – Employment land requirements resulting solely from demographic-driven labour supply growth, 2011-2031

Use class	Floorspace change 2011-2031 (sqm)	Employment land change 2011-2031 (ha)
B1a/b	127,922	26
B1c	57,066	14
B2	60,055	15
B8	298,200	60
Total B class	543,243	115

Source: Atkins

4.26. The above projections represent a different approach to considering jobs growth and employment land requirements than those used in options 1 and 2, as they are based on demographic trends as opposed to employment delivery and job creation trends. In demographic terms these take account of ONS data and population projections, whilst the CE data is based on economic forecasts. It is the uncertainty associated with economic forecasts that makes drawing links between employment land requirements and housing need notoriously difficult. As a result it is now widely accepted that housing requirements are not to be based solely on economic growth forecasts. There is also likely to be issues with employment land churn and migration patterns that impact on the changes in work age population in demographic terms. As such, the results of this option should be considered with caution.

4.27. It is also acknowledged that because of these uncertainties in comparative data sources that the above employment land requirements could underestimate the actual employment land need resulting from the delivery of 76,000 new homes across the sub-region. Furthermore, employment growth (and therefore employment land demand) is likely to be influenced by a range of other factors including the wider economic conditions, unemployment rates, urban regeneration and the churn of existing employment sites, household income and expenditure levels, structural economic changes, technological and operational changes and changes to labour force characteristics. A healthy sub-regional economy will generate additional employment land requirements as a result of existing businesses expanding, new businesses starting up and new businesses moving into the area either from elsewhere in the UK or abroad.

4.28. For the above reasons, the findings of this scenario are presented as part of the scenario testing exercise undertaken for this study but should be given limited weight in the assessment of the sub-region's future employment land requirements.

Scenario 4: Past completions

4.29. This scenario is based on data provided by the individual local authorities regarding completions of employment land over the past few years. Based on the data presented in Table 4-18, the average number of employment land completions across the LEP area is approximately 33 ha per year. If this is projected over the 2011-2031 period, it would result in a requirement for the provision of approximately 659 ha of additional employment land across the LEP area.

Table 4-18 Past completions (in hectares, B use classes only)

Period	Coventry	North Warwick-shire	Nuneaton and Bedworth	Rugby	Stratford-on-Avon	Warwick	LEP area
Time period	2003-2013	2008-2013	2004-2012	2003-2013	2004-2013	2003-2013	-
Average ha per year	8	13	1	4	3	3	33
Projected employment land requirement 2011-2031	163	270	26	76	63	61	659

Source: CWLEP local authorities, Atkins

4.30. It should be highlighted that linear projection of past trends does not necessarily provide an accurate forecast of what will take place in the future. For example, take up of a small number of large sites may skew the average rate of take-up which cannot reliably be used as a prediction for the future. As an example, the allocations of Hams Hall and Birch Coppice led to high levels of growth in North Warwickshire but these allocations were essentially for wider than local need and therefore past trends may not reflect future prospects. Despite this, past rates of take up provide a useful benchmark for future demand particularly when aggregated to a sub-regional level.

Conclusions and Implications

Future demand

4.31. The four scenarios tested above estimate the sub-region's additional employment land requirements over the period 2011-2031. These range from 115 ha (SHMA-linked scenario) to 659 ha (completions scenario). Using Cambridge Econometrics' base employment forecasts, the additional employment land need is estimated to be approximately 201 ha while according to the higher growth scenario (baseline+) the sub-region's employment land requirements to 2031 are estimated to be approximately 326 ha.

4.32. Given the fact that estimating future employment land demand requirements in quantitative terms is not an exact science, it is important not to be overly prescriptive in the application of numerical estimates of need. However, in accordance with NPPF guidance, the use of quantitative estimates of future need can provide an important 'rule of thumb' in setting out the potential scale of potential employment land need.

4.33. In developing employment land policies in Local Plans and incorporating estimates of future employment land requirements in Strategic Economic Plans, the use of quantitative estimates should be set in the context of the scale and nature of strategic economic growth policies being pursued by the local authorities and LEPs in question. In the case of CWLEP, the SEP has established strong aspirations to grow the sub-regional economy both in terms of scale and value. As was highlighted earlier, particular emphasis is put on attracting investment in the advanced manufacturing and engineering sectors. Overall, the SEP seeks to capitalise on the strategic location of the sub-region in order to maximise employment growth and actively facilitate economic diversification by making best use of the area's existing competitive strengths.

4.34. In an area such as Coventry and Warwickshire where growth aspirations are high and a need exists to address challenges such as relatively high levels of deprivation and unemployment, quantitative estimates of land requirements should build in a reasonable degree of flexibility. This is required to provide investment and occupier markets with choice sufficient enough to deter them from selecting alternative areas where more options may exist. Furthermore, flexibility is required to allow for the fact that a significant proportion of existing employment land sites and allocations are constrained and/or potentially unviable for development.

4.35. Consequently, we recommend that Scenario 2 (baseline+) is used as the minimum estimation of quantitative need in the sub-region. This scenario reflects relatively conservative economic performance boosted by targeted investment in new advanced manufacturing and engineering activity. Under this scenario, future demand for additional land is estimated to be around 326 ha in the period up to 2031.

4.36. However, as evidenced by past rates of take-up, actual demand could turn out to be significantly greater. A simple linear projection of past levels of B use class completions across the sub-region, results in up to 660 ha of additional land over the period 2011 to 2031. While there are limitations in the use of historic figures to predict future trends (e.g. a small number of major developments in past years could skew future projections), there is merit in taking them into consideration.

4.37. Therefore, bearing in mind historical rates of take-up and the need to build in sufficient flexibility to enable the property market to operate efficiently, we recommend that the estimated future requirement of 326ha is regarded as a minimum. This should be used as a guideline only and should be subject to regular testing and assessment. Moreover, the Local Plans of each local authority should enable land to be allocated and made available for development on a phased basis in order not to flood the market during the early years of plan implementation.

Quantitative demand-supply balance

4.38. An appraisal of major sites (over 6ha) has been undertaken and reported in section 6 of this report. High level data on the supply of employment sites (extant permissions and allocations) has been collated by the constituent local authorities of the sub-region for the purposes of this study. As highlighted in Table 4-19, a gross land employment land supply of 353 ha is theoretically available in the sub-region. However, approximately 71 ha of employment land has either been committed or identified as likely to be lost to other uses. Subtracting this from the available land supply, the sub-region has a net availability of approximately 282 ha.

4.39. Furthermore, it is recognised that a significant proportion of existing land supply and allocations are not readily available for development given physical or infrastructure constraints and / or viability considerations. Based on our knowledge of site and market conditions and drawing on experience of Local Plan allocations across the country, we conservatively estimate that no more than 70% of existing supply is readily available and viable for employment development. Most of this readily available and viable land is expected to be developed over the next 5 years, leaving a significantly diminished supply of land beyond 2019. This is expected to lead to a limited supply of good quality sites, further supporting the need for a major sub-regional site.

4.40. Based on the above and as indicated in Table 4-19, our assessment concludes that there is a significant quantitative shortfall in existing, readily available, employment sites which could amount to up to approximately 129ha.

Table 4-19 Existing employment land availability

Local authority	Land with planning permission and approved/draft allocations	Land committed or likely to be lost to non B class uses
Coventry	85 ha	44 ha
North Warwickshire	57 ha	2 ha
Nuneaton and Bedworth	20 ha	N/A
Rugby	85.5 ha	2 ha
Stratford-on-Avon	39.5 ha[8]	23ha
Warwick	66 ha[9]	-
Total	353ha	71 ha
Net Land Supply	282ha	
70% available	197ha	
Minimum land requirement to 2031 (Baseline+ growth scenario)	326ha	
Shortfall	129ha	

Source: Compiled by Atkins based on information supplied by the local authorities

Qualitative Need

4.41. In developing robust employment land policies, it is essential that particular consideration is given to meeting the qualitative aspects of need. Whilst obvious, it should be pointed out that no

[8] Stratford-on-Avon District Council is also proposing the provision of 100 hectares specifically for the expansion of Jaguar Land Rover's operations at Gaydon and 19 hectares to meet the needs of Redditch. The proposed allocation for JLR identifies a range of other uses besides those within Class B, eg. marketing, conference, education and leisure related to the company's activities. The potential land take associated with these uses is not yet known.

[9] 21 ha of employment land was identified in the Warwick ELR as having suitability issues for continued employment use and potentially be suitable for redevelopment for alternative uses. Replacement provision for this loss has already been taken into account in the 66 hectares supply as well as a further 16.5 hectares for flexibility.

amount of allocated employment land will meet future investment and occupier needs if the sites are of a poor quality, of insufficient scale, located in unsuitable areas or subject to prohibitive viability constraints.

4.42. The qualitative issue is particularly important in Coventry and Warwickshire which is an area where proactive economic growth, diversification and investment is being promoted by the LEP. Reflecting the area's strategic location and existing competitive advantages, there is a compelling need to ensure that the right quality of supply is provided to meet the needs of target sectors and business types. In CWLEP key aspects of latent demand include:

- Large manufacturing and engineering activities (including Original Equipment Manufacturers in the automotive sector).
- Technology-focussed businesses including the automotive supply chain.
- Large logistics and distribution facilities at locations access to the strategic road network.
- Spin off, supply-chain demand for the establishment and growth of the SME across a range of sectors.

4.43. The SEP highlights that the CWLEP area has a competitive advantage in the AME cluster. Research conducted by GL Hearn using EGi data on property deals indicate significant activity in the AME market (including the automotive supply chain)[10]. This need is particularly pronounced in the market for large units (over approximately 9,000 sqm) in which it is argued by GL Hearn that readily available floorspace supply in the CWLEP area is only sufficient to meet less than 2 years need.

4.44. In the CWLEP area, there is also evidence of need for additional technology-focused B1 space which reflects the major existing infrastructure and investment in R&D activity in the sub-region, particularly through the two universities and major firms.

4.45. Evidence of demand from major manufacturing investors to the sub-region is demonstrated by a range of deals such as those listed below which have taken place in recent months:

- Feb 2014: A Coventry-based RDM Group, a supplier to Jaguar Land Rover, Aston Martin and Bentley, announce investment in acquiring a new 20,000 sq.ft manufacturing facility which will create 25 new jobs.
- Jan 2014: Automotive Insulations, a thermal and acoustic insulation manufacturer, announcing investment in a new 65,000 sq.ft premises which will employ 200 people.
- Feb 2014: Brose, a manufacturer of seat and window systems, confirming a £15 million investment to its Coventry facility with associated increase in its workforce to 250 employees.
- July 2014: Brose confirming a £7 million expansion to its components manufacturing facility at Hams Hall in North Warwickshire.

Strategic Role of Coventry and Warwickshire

4.46. As reflected in the aspirations of the SEP, the CWLEP area is located strategically and is seeking to attract significant inward investment, particularly in key sectors in which the area has a competitive advantage (including advanced manufacturing and engineering). Given the importance of inward investment to the future success of the manufacturing and logistics sectors in the area, it could be argued that this strategic need should be considered over and above the 'local and sub-regional' need, estimates of which have been quantified earlier in this section. These quantitative estimates of future employment land requirements are by their nature, trend-based and therefore not necessarily reflective of latent demand from large scale inward investors. For this reason, we assess in the next section, the potential case for identifying one or more strategic sites aimed specifically at attracting inward investment to the sub-region.

[10] GL Hearn / Nick Ireland – Proof of Evidence, Coventry and Warwickshire Gateway Inquiry, 2014.

5. Assessment of Need for Strategic Employment Sites

Introduction

5.1. This section considers objectively the case for identification of one or more strategic employment sites to serve the economic policy aspirations and potential of Coventry and Warwickshire. In terms of demand and potential justification for a strategic employment sites policy in the area, we have considered the following key factors or drivers:

- Policy need – is there a strategic policy justification for a strategic site policy?
- Market need – is support for strategic sites evident in developer and investor markets?
- Local economic need – will the allocation of strategic sites assist significantly in addressing local economic priorities.
- Quantitative need – is there likely to be sufficient future demand for employment land that makes it important to identify strategic sites? This question is answered by assessing future demand relative to existing planned and potential supply.

5.2. For the purposes of this study, an employment site of strategic significance is defined as a site that:

- Is at least 20 ha in size or is likely to accommodate at least 80,000 sqm of floorspace.
- Has excellent access to the strategic road network.
- Has good levels of accessibility and is located within, or close to, the areas of greatest need.
- Demonstrates good strategic fit with the Strategic Economic Plan, primarily being capable of meeting the needs of the sub-region’s key growth sectors including advanced manufacturing and engineering, research and development and logistics.
- Has premier appeal to national and potentially international investors.
- Is feasible and deliverable in terms of being financially viable and able to overcome any significant physical, environmental or infrastructure constraints.

5.3. The purpose of this study is to assess the potential need for site(s) of sub-regional significance. Whilst some sites assessed as part of this study potentially play a role which could be considered of regional significance, it should be noted that, at the time of writing, a regional employment study has been commissioned using Regional Assembly legacy funding on behalf of the LEPs within the West Midlands area. Consequently, the findings of this study should be considered alongside that of the regional sites study when available.

Policy Need

5.4. The Plan for Growth and the National Planning Policy Framework made changes to national planning policy which strongly supports development that can drive economic growth. The government has set ‘clear expectations that local planning authorities and other bodies involved in granting development consents should prioritise growth and jobs’.

5.5. As was highlighted earlier in this report, the CWLEP Strategic Economic Plan establishes the policy priorities and objectives for the area of Coventry and Warwickshire. The SEP sets a clear and positive framework for promoting economic growth and diversification in the sub-region. Its objectives unambiguously seek to ensure Coventry and Warwickshire is appealing as a prime business location, attracts significant inward investment and generates jobs. The SEP aims to retain the area’s competitive position building on it strategic geographical location and building on the area’s strength in key growth sectors such as advanced manufacturing and engineering, research and development and logistics. It is imperative that the sub-region remains well placed to take full advantage of the opportunities arising from the ongoing economic recovery with market-ready solutions for developers, investors and businesses.

5.6. The above are reflected in the vision and strategic priorities of CWLEP's Strategic Economic Plan (March 2014):

"The vision for Coventry and Warwickshire recognises that we will build on our central location, employment sites, distinctive businesses, innovation assets and highly talented workforce, to become a high performing economy with innovative businesses competing internationally, growing and providing better paid employment opportunities for residents across both rural and urban areas".

5.7. The Strategic Economic Plan states that economic growth and competitiveness depend upon the availability of the appropriate infrastructure. The availability of employment sites in particular is identified as fundamental to improving the competitive edge of Coventry and Warwickshire, attracting new investors, retaining local businesses and the reshoring of manufacturing.

5.8. Furthermore, the Coventry and Warwickshire City Deal aims to deliver 15,000 new jobs by 2025 including over 8,800 jobs in advanced manufacturing and engineering. Delivering this quantum of employment growth in advanced manufacturing and engineering is likely to require the availability of major employment sites that will enable existing businesses to expand and new business to move to the sub-region.

5.9. In order to remain competitive at the regional, national and international levels, Coventry and Warwickshire should maintain an attractive and competitive portfolio of sites, especially in terms of larger sites that could meet the needs of the identified growth sectors. The sub-region must remain in a position that enables it to respond to emerging challenges and opportunities like the ambitious plans for UK Central which lies just outside the sub-region's boundaries. The Greater Birmingham and Solihull Local Enterprise Partnership and Solihull MBC have major plans for nationally-significant growth at UK Central that could provide 100,000 new jobs and attract significant levels of domestic and international investment.

5.10. These plans present both a challenge and an opportunity for Coventry and Warwickshire. The challenge relates to how the sub-region will remain competitive and attractive to businesses in the face of such strong competition. Part of the response to that challenge must relate to the provision of a high quality supply of employment land and associated infrastructure, including large quality sites with the flexibility to meet the needs of key business sectors. The opportunity relates to the agglomeration opportunities that arise from the large concentration of economic activity located close to the sub-region's borders. Coventry and Warwickshire should fully explore the opportunities to take advantage of the spin off effects of UK Central as there is likely to be interest from business to be located close to this major economic activity cluster, especially in terms of supply chain linkages.

5.11. The proposed High Speed 2 Birmingham Interchange Station will also be located close to the sub-region's borders and would present an opportunity to enhance Coventry and Warwickshire's attractiveness as a business location by improving travel times to central London and potentially (in later phases of the scheme) to Heathrow Airport and the North.

5.12. Overall, the concept of identifying one or more strategic employment sites in the CWLEP with a robust focus on key sectors sits comfortably with the recently established policy framework in the area. Indeed, the SEP itself identifies prioritised, large employment sites. Consequently, from a policy perspective, the formal allocation of one or more strategic employment sites within the suite of Local Plans in the area would be logical and sensible step.

Market Need

5.13. In the stakeholder consultation event held in January 2014, property agents and developers active in the area expressed their views that there is strong demand for more manufacturing and logistics sites in Coventry and Warwickshire.

5.14. According to the market perspective of Jones Lang LaSalle (JLL), there are two key growth sectors that will drive the demand for strategic employment sites in the short, medium and longer term. These are automotive and large big box logistics. The large big box logistics market is mature for the sub-region which takes in a large part of what is known as the “Golden Triangle” (broadly defined by the M42, M6 and M1 Motorways).

5.15. The development of large sub regional sites within Coventry and Warwickshire over the last 20 years has been largely off the back of this sector. JLL see this trend continuing because the market for this type of property in this location is as strong as ever. Demand is increasing, both quantitatively and qualitatively (due to the continuing dynamism of the sector), while supply is diminishing.

5.16. JLL’s recent ‘On Point’ publication which looks at the UK Big Box Industrial and Logistics market suggests a further strengthening of the market (both in the short and medium term) through an increase in take up, reduced supply, increased development (particularly built to suit) and the return of speculative development. It also demonstrates the continued strength of the Midlands. In 2013, 40% of all take up in the UK was in the Midlands, shared almost equally between East and West. Much of this was in the Golden Triangle, in and around the sub region. The three key predictions of JLL’s research are that:

- Speculative development will increase;
- Demand for dot.com warehouses for on-line food fulfilment will grow; and
- Demand for inter/multi modal logistics will increase.

5.17. The sub region has been at the forefront of speculative development in 2013, seeing development at Ryton (Coventry) and Birch Coppice (Dordon, near Tamworth). The latter comprised a 169,000 sq ft unit that was recently let pre-practical completion to DAU Draexlmaier Automotive.

5.18. Dot.com fulfilment centres are likely to be attracted to the sub region due to its proximity and relationship with Birmingham. Given improved rail competiveness and environmental pressure to reduce the carbon footprint within supply chains, demand for inter/multi modal logistics solutions is likely to increase. According to JLL, in most cases, companies are likely to want the flexibility of using a rail freight terminal rather than committing to a dedicated rail connected warehouse. The desire to future proof buildings and locations is often a key factor to companies when selecting inter modal or multi modal sites. Two out of the three inter modal freight terminals in the West Midlands are located within the sub region. These are Birch Coppice and Hams Hall. Both are located in North Warwickshire, with principal access to the M42 Motorway and West Coast Mainline. The presence of these two terminals within the sub region, with good capacity for growth, presents an opportunity for the sub-region.

5.19. The automotive sector has been rekindled by the renaissance of Jaguar Land Rover but there are also other thriving automotive companies that impact on the economy of the sub region due to their component supply network. These include BMW at Oxford, Toyota at Burnaston and JCB at Rocester (Staffordshire). According to JLL, they are fielding a number of enquiries from automotive companies for sites between 100,000 and 300,000 sq ft and are also receiving enquiries from the automotive component supply chain in the 50,000 to 250,000 sq ft range. The recent letting at Birch Coppice of 169,000 sq ft to DAU Draexlmaier is a good example, with this company being a component supplier to JLR.

5.20. In JLL’s views, there is a quantitative and qualitative shortage of suitable land to accommodate the automotive and logistics sectors and there is a need to identify new land that will meet the requirements of the two key growth sectors and that is deliverable. Moreover, given the long lead in times of procuring large sub regional sites (often 3 years or so before new buildings can be developed and offered to the market), there is a need to identify and promote land in more than one location that would be able to attract and accommodate both internal and external strategic inward investment.

5.21. There are a number of cross boundary issues that present opportunities. These most obviously include Birmingham and Solihull. However, there are parts of Staffordshire (Tamworth being an obvious example) that cannot absorb their own growth and are actively looking at the sub region (e.g. North Warwickshire) to help out.

5.22. The most obvious constraint is the Green Belt, which the Government has made clear remains a priority to protect against from built development. This affects a large part of the sub region and places as a premium on those areas or sites that are not protected.

5.23. In terms of the principal characteristics of any new sub-regional sites, JLL identified location, size and delivery as the key factors. Location is governed by access to markets, materials and labour. This will require sites with good access to the national motorway and strategic road network, the principal cities and towns, and close to the region's inter modal freight terminals.

5.24. Sites would need to be a minimum of around 20 hectares (50 acres) and be deliverable. It is important that the sites are being promoted by a competent developer who understands the scale of investment required, both in terms of money and time, to successfully bring forward large employment sites.

5.25. In JLL's view, which was echoed by the other market agents and developers attending the consultation event, there is a need for more than one new strategic site. This is due to the gap between supply and demand in the key growth sectors, the different characteristics of potential sites (and, therefore, their capabilities of meeting different sectors of demand), and to ensure any strategy is not predicated on just one location.

5.26. The strong demand and short supply for industrial and logistics space across the West Midlands is also highlighted in CBRE's Logistics MarketView 2013 report. CBRE's research suggests that the majority of good, modern, existing units are attracting strong interest from occupiers. In many cases, this interest comes from multiple parties and the lack of good quality, ready to occupy warehouse space in core Midlands locations is set to present significant challenges for those occupiers seeking units on a short term basis where design and build solutions are not suitable. These market dynamics have resulted in speculative development becoming more attractive to developers.

5.27. According to CBRE's research the UK's automotive sector generated strong demand in 2013, particularly in the Midlands, North West and South West. Car production in the UK returned to pre-recession levels of output in 2012 (largely due to strong exports) and the combination of this growth with investment in new plants has generated increased demand from the wider supply chain. Take-up across the Midlands has been steady during the course of 2013, pushing ahead of both the 2012 and 2011 totals and being the highest since 2010. Overall take-up in the Midlands during the year was 6.34 million sq ft, of which 3.81m sq ft took place during the second half. Looking ahead, CBRE expects to see further demand emerge from grocery retailing, particularly given the rapid expansion of budget supermarkets. The growth of online retailing and motor vehicle manufacturing will also continue to add to Midlands demand.

5.28. At the same time, supply levels continue to diminish and CBRE expects this trend to continue into 2014 with demand exceeding supply given minimal second-hand space coming back to the market and a lack of newer Grade A buildings. The Midlands are identified as one of only two regions that have seen the resumption of speculative development for 100,000 sq ft + logistics units, with Birch Coppice and Prologis Ryton both mentioned as generating strong interest from occupiers. According to CBRE, the present state of logistics supply is likely to lead to upward pressure on rental levels, particularly in core Midlands markets.

5.29. Property consultants GL Hearn's market context analysis that appeared in the Review of Economic & Employment Matters relating to the Planning Application for the Coventry & Warwickshire Gateway also indicated that the lack of speculative development of logistics and industrial floorspace in the region and particularly in the sub-region in recent years has led to growing concerns in the market over the supply of new floorspace and concluded that new space is clearly needed.

5.30. According to GL Hearn's analysis, the region had approximately three years supply of industrial floorspace below 100,000 sq ft in 2013, with a particularly limited supply of units in the 50-100,000 sq ft size range in the Coventry area. The reductions in tenant incentives and upwards pressures on rents provide evidence of the diminishing supply of buildings. With regard to the high technology, R&D and advanced manufacturing sectors, high occupancy levels at existing science and technology parks in the sub-region accompanied by anecdotal evidence of a need for larger grow-on accommodation for existing science and technology park occupiers, along with a current lack of supply of accommodation aimed at this market, indicates that market demand does exist.

5.31. Market analysis undertaken by Savills for the Coventry and Warwickshire Gateway Planning Statement (2012) suggested there is evidence of strong demand from businesses which require large, accessible sites and a lack of existing sites capable of meeting such requirements. According to this analysis, there was less than 4.5 years' supply (in 2012) of large sites in the market area to meet the needs for large industrial/warehouse buildings. Savills' analysis also suggests there is a direct link between take up (demand) and supply with the availability of high quality sites increasing take up rates. In this sense, the constrained supply and lack of availability may lead to the loss of inward investment as interested businesses are unable to find suitable high quality sites.

5.32. Overall, feedback from the market is that a strong case is made for the identification of strategic employment sites in the CWLEP area in order to meet footloose demand and major investment projects particularly in the advanced manufacturing, technology, engineering and logistics sectors. We consider that the consistency in the evidence provided by leading national property agents provides a clear message that there is significant latent demand for large scale investment if suitable and competitive sites can be made readily available to serve the national logistics and footloose manufacturing and engineering occupiers. The case made by these agents for the identification of one or more strategic sites in the sub-region is compelling.

Local Economic Need

5.33. Whilst one of the main purposes of strategic employment sites is to attract inward investment, it is important that they also have the potential to make a notable contribution to addressing local economic need. Employment growth by itself cannot address complex socio-economic deprivation problems but the provision of new employment opportunities can have a positive impact on areas of need.

5.34. The areas of greatest need are considered to be those meeting the following criteria:

- Areas that have seen significant population growth over the past 10 years and are projected to see further growth in the future;
- Areas with high levels of unemployment; and
- Areas with high levels of deprivation.

5.35. In terms of population, Coventry is the sub-region's main urban centre accounting for approximately 37% of the sub-region's total population. Its population grew by 22,400 people between 2003 and 2012 (latest available data), accounting for 40% of the sub-region's population growth over that period. Coventry is expected to continue to be the focus of population growth, with CWLEP's Strategic Economic Plan stating that half of the sub-region's 80,000 population increase will take place in Coventry.

Table 5-1 Mid-year population estimates, 2003-2012

Year	Coventry	North Warwickshire	Nuneaton and Bedworth	Rugby	Stratford-on-Avon	Warwick	LEP area
2003	300,700	61,700	120,500	89,100	113,000	130,700	815,700
2004	298,200	61,800	120,700	90,000	113,500	132,700	816,900
2005	298,400	61,900	121,000	91,300	114,800	134,600	822,000
2006	300,100	61,900	121,800	93,100	116,700	135,600	829,200
2007	301,400	61,800	122,700	94,700	118,500	136,700	835,800
2008	305,200	62,000	123,900	96,400	119,700	137,400	844,600
2009	307,400	62,100	124,300	97,700	119,800	138,200	849,500
2010	311,700	62,100	124,800	99,000	120,200	138,100	855,900
2011	316,900	62,100	125,400	100,500	120,800	137,700	863,400
2012	323,100	62,200	125,800	100,800	120,600	138,600	871,100
Change 2003-2012	22,400	500	5,300	11,700	7,600	7,900	55,400

Source: Office for National Statistics

5.36. In terms of unemployment, the latest available data for the period April 2013 to March 2014 show that Nuneaton and Bedworth had the highest unemployment rate in the sub-region but all other local authorities had unemployment rates below the England average of 7.3%. Examining the unemployment rate trends over the period 2006-2014, Coventry had the highest average unemployment rate in the sub-region (8.1%), followed by Nuneaton and Bedworth (7.7%) and North Warwickshire (6.9%).

Table 5-2 Unemployment rate - aged 16-64

Period	Coventry	North Warwickshire	Nuneaton and Bedworth	Rugby	Stratford-on-Avon	Warwick
Apr 2013-Mar 2014 (latest available)	6.5%	6.2%	8.3%	3.1%	2.8%	6.4%
Average Apr 2006-Mar 2014	8.1%	6.9%	7.7%	5.7%	4.2%	4.9%

Source: Annual Population Survey, Office for National Statistics

5.37. According to the English Indices of Deprivation, Coventry and Nuneaton and Bedworth are the only local authorities in Coventry and Warwickshire that are ranked among the 50% most deprived in England. Coventry in particular is ranked 53rd out of 326 local authorities in England and is therefore in the 20% most deprived.

Table 5-3 Average deprivation rank

	Coventry	North Warwickshire	Nuneaton and Bedworth	Rugby	Stratford-on-Avon	Warwick
Average deprivation rank (out of 326 local authorities)	53rd	172nd	115th	225th	271st	260th

Source: Department for Communities and Local Government, Indices of Deprivation 2010

5.38. The consideration of population growth, unemployment rates and deprivation levels suggests that the greatest areas of need in Coventry and Warwickshire are Coventry, Nuneaton and Bedworth and North Warwickshire. Coventry in particular has a rapidly growing population, higher than average levels of unemployment and relatively high levels of deprivation, making it an area that would clearly benefit from further employment creation and regeneration.

5.39. Based on the above and in line with CWLEP's Strategic Economic Plan it is considered that the areas around Coventry and to the north of the LEP area would particularly benefit from the provision of new employment opportunities and developments that would contribute to local regeneration objectives. These local economic needs should be considered in the event of strategic employment sites being formally adopted as part of the Local Plan process.

Quantitative Need

5.40. Whilst scale of investment and development opportunity is critical, our strongly held view is that the main driver behind the identification of strategic employment sites (in any part of the country) should be to meet qualitative needs. This reflects the fact that inward investors are seeking a high quality product that meets key requirements and therefore should be differentiated from employment sites allocated to accommodate 'local need' or natural growth. The role of strategic employment sites should be to help a local economy take a step-change in economic performance and profile. Inward investors are footloose and competition between locations is steep and indeed, often extends internationally. Consequently, in considering the identification of strategic sites, it is important to be focused on the purpose for doing so and to avoid the temptation of perceiving such sites as a 'one-stop-shop' in terms of planning policy. Whilst a component of local employment needs may well be accommodated on strategic sites, it is essential that the offer to the inward investment market is not diluted.

5.41. For the reasons described briefly above, we do not consider that the quantitative balance between forecast 'demand' and existing planned supply should be the main measurement of 'need' for the identification of strategic employment sites. However, clearly it is important to have regard to the availability of existing supply to assess if sites are already allocated and available which would meet the criteria necessary to perform the role of a strategic employment site.

5.42. Section 4 of this report set out scenarios of potential future need for employment land. By their nature, these scenarios are strongly influenced by past trends although some scenarios did consider a boost to economic performance primarily through investment in AME sector. Bearing in mind a range of influencing factors, it was concluded that, for the period up to 2031, there is a potential shortfall of at least 129ha in the CWLEP. Whilst not being a primary driver of need, there remains a quantitative case for the identification of one or more strategic employment sites in the CWLEP area. This is reinforced by the need to ensure sufficient flexibility is provided in the supply of good quality employment land in the sub-region to allow for market choice and churn.

Conclusion

5.43. From our assessment of potential need, we conclude that there is a clear case for the identification of one or more strategic employment sites to serve the CWLEP area. This case is reflected by 'need' being evident in policy, local economic, market and quantitative terms.

5.44. The following section provides an assessment of potential supply to assess sites with potential to perform a strategic employment site role.

6. Assessment of Supply

Introduction

6.1. This section provides a review of existing and potential major sites in the CWLEP area. It responds to the objectives established by the Strategic Economic Plan which highlight the importance of making available priority sites to attract inward investors, retain local businesses and to facilitate the 'reshoring' of manufacturing.

6.2. The assessment appraises all existing allocations and proposals over 6ha in size which amounts to a total of 26 sites. A summary of the assessments is provided in this section with full details of the site appraisals contained in Appendix B.

Methodology

6.3. The purpose of the analysis was to appraise each site against a consistent set of criteria. Site suitability has been appraised against the factors or criteria identified below (see Table 6-1). It is not possible to provide a definitive set of terms within each criteria because there is a wide variety of issues and qualitative factors which can also be important in deciding whether the term 'good' is more appropriate than 'reasonable' but Table 6-1 gives a guide to the basis for the main judgements made.

Table 6-1 Site Appraisal Assessment Methodology

Suitability Criteria	Assessment components
Access to amenities	Amenities include facilities such as a bank, cafe, crèche, convenience shop, pub, gym, public open space. Excellent provision would be a location within or adjacent to a district, town or city centre Good provision would be over 3 facilities within 400 metres of the site Reasonable provision would be over 3 facilities within 800 metres. Poor provision: 3 or less facilities within 800 metres None: No facilities within 800 metres
Accessibility by public transport	Excellent: Choice of several high frequency public transport services Good: Services every 20 minutes between 7 am and 7 pm. Reasonable: Services between 20 to 40 minutes between 7 am and 7 pm Poor: Services over 40 minutes between 7 am and 7 pm None.
Accessibility to strategic transport network	This factor looks at the proximity of a site to motorways and 'A' class roads, as well as to rail access/ stations. Excellent provision would be access to a motorway or a dual carriageway 'A' road within 1 km of the site access or good access to an 'A' road and access to a rail station with regular services

Suitability Criteria	Assessment components
	Good provision would be access to an ‘A’ road within 1 km of the site access Reasonable: between 1 and 2 km to an ‘A’ Road Poor: Over 2 km to ‘A’ road
Links/proximity to areas of high unemployment	Good: Within 2 km of area of high unemployment/worklessness Reasonable: Within 2 to 10 km of area of high unemployment/worklessness with good or reasonable public transport connections Poor: Over 10 km from area of high unemployment/worklessness
Neighbouring Uses	What are neighbouring uses? What effect do they have on the attractiveness of the site – negative, neutral, positive? Businesses generally like to locate in clusters where suppliers and support services are available, so proximity to existing employment areas is usually a positive factor. Negative factors might include neighbouring uses which might constrain how an adjoining site is used e.g. the need to protect residential amenity.
Relationship to strategic corridor	Good: Within 2 km of a strategic corridor. Reasonable: On fringe (i.e. between 2 and 5 km of corridor). Poor: Not in corridor. Corridors are: • A46 from J15 M40 to J2 M6; • North –South rail line (NUCKLE 1 and 2) links Nuneaton in north through Bedworth, Coventry, Kenilworth to Leamington Spa; • North- South corridor including A45, A46, M69, A444 and A452; • Coventry Station; and • A5.
Suitability of site for targeted growth sectors	Targeted growth sectors are: • Advanced Manufacturing and Engineering particularly large premises over 100,000 sq ft; • Automotive supply; • Large Logistics over 100,000 sq ft; • IT Services; and • Professional Services. Suitability has been described as High, Moderate or Low.
Suitability of site for intended use	Some judgement required here. Requirements will differ. If proposed use is large logistics then its needs – location near motorway, flat site, etc will differ from a science park which would benefit from an attractive park style setting, proximity to a University. Suitability has been described as High, Moderate or Low.

6.4. The prospects for delivery of development have taken account of a range of potential constraints. Some of these factors (e.g. the presence of listed buildings on or near to a site, flooding or contamination) are more likely to be an issue where planning permission has not yet been granted and the relevant issue has not yet been considered in detail. Table 6-2 set out the typology of delivery constraints considered during the site appraisal process.

Table 6-2 Constraints Evaluation Typology

Factors which may acts as a constraint on delivery	Explanation
Access	Any needs for off-site highway improvements
Contamination	Whether there is known contamination which will need to be addressed
Environmental Designations	For example: ancient monuments, ancient woodland, listed buildings, etc
Flooding	Presence and extent of flood risk zones
Ownership	A single and willing owner is desirable. A site which is in multiple ownership and which has yet to have an agreed basis for site promotion raises questions over early deliverability.
Pylons	Presence of pylons recorded where known as may occasionally constrain development.
Topography	Whether extensive regarding will be necessary
Other	Any other issues which might constrain delivery e.g. the need to relocate existing uses.

6.5. From this analysis, the analysis has classed each site into one or more of three groups: early delivery i.e. within 2 years, medium delivery 2 to 5 years, long term delivery over 5 years. It should be noted that these are broad brush categories, and in each case there may well be some activity before or after the time period shown. However, if it is considered that 80% of site development will occur within one particular period then that site has been allocated to that period alone. Where, development activity on a site is more likely to be more evenly spread than this, then it has been placed in more than one time period.

Findings

6.6. From analysis of the site appraisals an overall conclusion has been reached about a site's likely impact level, based on their suitability characteristics and their size. In assessing overall suitability the importance of good strategic transport connections and suitability for targeted growth sectors have been give more weight than the other suitability factors identified. Sites have been grouped into one of three categories: primary sub-regional, secondary sub-regional and local.

6.7. With regard to delivery, the site appraisals indicate our view of when delivery of development is likely to take place. There do not appear to be any sites where there are clear 'showstoppers'. However, many sites have significant work to do in resolving site related issues. Daw Mill is the least well advanced site in terms of the planning process, and there would appear to be several issues e.g. remediation of contamination, transport, etc. which will need significant investigation and consideration.

6.8. Table 6-3 summarises the findings of the site appraisal process and identifies the potential role and market each site is most suitable in serving. Table 6-4 adds further detail by providing an indication of the likely delivery timescale of each site.

Table 6-3 Potential Role of Major CWLEP Sites

Primary sub-regional	Secondary sub-regional	Local
Coventry Gateway Ansty Park Friargate	Birch Coppice Gaydon/Lighthorne Heath Bermuda Park Extension 2 Prologis Ryton Rugby Gateway Rugby Radio Whitley Business Park	Bermuda Park Extension 1 Codemasters Daw Mill Fen End Holly Lane, Atherstone Lyons Park Arden Road, Alcester Bishopton Gorcott Hill* Prologis Central Park Stoneleigh Park Tournament Fields Wildmoor Warwick Technology Park (adj.) Winyates Green*

*Sites of importance to Redditch Borough

Table 6-4 Role of Major CWLEP Sites by Delivery Timescale

Likely delivery timescale	Primary sub-regional	Secondary sub-regional	Local
Early (0 to 2)	Ansty Park (part) Coventry Gateway (part)	Birch Coppice (Phase 2) Prologis Ryton Rugby Gateway (part)	Tournament Fields Prologis Central Park
Medium (2 to 5 years)	Ansty Park (part) Coventry Gateway (part) Friargate (part)	Bermuda Park Ext'n 1 Birch Coppice(Phase 3) Rugby Gateway (part) Whitley Business Park Gaydon / Lighthorne Heath	Codemasters Wildmoor Bishopton Gorcott Hill Winyates Green
Long Term (over 5 years)	Coventry Gateway (part) Friargate (part)	Gaydon / Lighthorne Heath Bermuda Park Ext'n 2 Rugby Radio Station	Stoneleigh Park Holly Lane, Atherstone Arden Road, Alcester Bishopton Gorcott Hill Daw Mill Fen End Thickthorn Warwick Technology Park Winyates Green

6.9. Following our site assessment three key sites have been identified as having particular potential for identification as strategic or Primary sub-regional employment sites with a clear sector focus:

- Ansty Park – B1 and high technology uses.
- Friargate – Centre office occupiers.
- Coventry and Warwickshire Gateway – Large manufacturers, logistics and technology uses.

6.10. It should be noted that the Gaydon/Lightorne Heath site potentially plays a significant sub-regional and even wider role. However, it is reserved for a known, single occupier which means that it will not be available to the open market and therefore should be considered separately for the purposes of this study.

6.11. Together these sites provide a good balance of inward investment and/or strategic growth opportunities.

6.12. The Coventry and Warwickshire Gateway site (Zones A and B) in particular satisfies all the strategic sites criteria outlined in the previous chapter. It is located close to Coventry which is one of the sub-region's key areas of need for new jobs and regeneration along with the focus for much future population and labour supply growth. The Gateway site is of a substantial size which will be vital to meeting the particular needs of key growth sectors such as advanced manufacturing, engineering and associated logistics. It could also support the growth plans of the sub-region's two Universities, with Coventry University expressing strong support for the scheme. The Gateway site is identified as the priority employment sites in the Strategic Economic Plan thus has considerable weight in terms of strategic policy fit.

6.13. Furthermore, extensive technical work has already been undertaken in support of the site's planning application and should the site be granted planning consent it has the potential to be developed within a reasonable time period. It therefore appears to be best placed to realistically play the role of a new strategic employment site with a particular focus on manufacturing and logistics.The planning application for the Gateway site covers land in both Coventry and Warwick and both local planning authorities are minded to grant planning permission. Furthermore, there is policy support in the Warwick District Local Plan (Revised Development Strategy) for a sub-regional employment site in this broad location.

6.14. The Ansty Park and Friargate sites are also of strategic importance but should be distinguished from the Gateway site in terms of their target markets. The Gateway site should have a clear focus on large scale manufacturing and logistics users (as well as research and development and light industrial in Zone B), whilst Ansty Park has a clear role to play in attracting high technology activities and Friargate, city centre services.

6.15. It should be highlighted that Ansty Park is actively being marketed by the HCA. It already benefits from the Manufacturing Technology Centre and provision of offices occupied by Sainsbury's. The HCA are specifically targeting the site at high tech companies to link to the local Universities and advanced manufacturing industries already established in the sub-region. There are also opportunities to expand the site with links to the adjacent Rolls Royce factory.

6.16. Friargate is situated in the centre of Coventry around the city's train station which makes it an attractive location for those commuting into the city by public transport. Development potential is also is being enhanced by the station redevelopment proposals and the KNUCKLE projects which will increase rail connectivity between Nuneaton, Bedworth, Coventry, Kenilworth and Leamington Spa. The site offers particular potential for office provision with up to 300,000 sqm of floorspace spread across 26 buildings. Two of these buildings now have detailed planning consent, with the first due to be completed by autumn 2016.

7. Conclusions and recommendations

Future employment land requirements

7.1. Four employment growth scenarios were tested as part of this study in order to provide a quantitative estimate of the sub-region's additional employment land requirements over the period 2011-2031. These ranged from 115 ha (SHMA-linked scenario) to 659 ha (completions scenario). Using Cambridge Econometrics' base employment forecasts, the additional employment land need is estimated to be approximately 201 ha while according to the higher growth scenario (baseline+) the sub-region's employment land requirements to 2031 are estimated to be approximately 326 ha.

7.2. Given the fact that estimating future employment land demand requirements in quantitative terms is not an exact science, it is important not to be overly prescriptive in the application of numerical estimates of need. However, in accordance with NPPF guidance, the use of quantitative estimates of future need can provide an important 'rule of thumb' in setting out the potential scale of potential employment land need.

7.3. In developing employment land policies in Local Plans and incorporating estimates of future employment land requirements in Strategic Economic Plans, the use of quantitative estimates should be set in the context of the scale and nature of strategic economic growth policies being pursued by the local authorities and LEPs in question. In the case of CWLEP, the SEP has established strong aspirations to grow the sub-regional economy both in terms of scale and value. As was highlighted earlier, particular emphasis is put on attracting investment in the advanced manufacturing and engineering sectors. Overall, the SEP seeks to capitalise on the strategic location of the sub-region in order to maximise employment growth and actively facilitate economic diversification by making best use of the area's existing competitive strengths.

7.4. In an area such as Coventry and Warwickshire where growth aspirations are high and a need exists to address challenges such as relatively high levels of deprivation and unemployment in certain parts of the sub-region, quantitative estimates of land requirements should build in a reasonable degree of flexibility. This is required to provide investment and occupier markets with choice sufficient enough to deter them from selecting alternative areas where more options may exist. Furthermore, flexibility is required to allow for the fact that a significant proportion of existing employment land sites and allocations are constrained and/or potentially unviable for development.

7.5. Consequently, we recommend that Scenario 2 (baseline+) is used as the minimum estimation of quantitative need in the sub-region. This scenario reflects the continuation of past trends boosted by targeted investment in new advanced manufacturing and engineering activity. Under this scenario, future demand for additional land is estimated to be around 326 ha in the period up to 2031. However, as evidenced by past rates of take-up, actual demand could be significantly greater (up 660 ha between 2011 and 2031). Bearing in mind historical rates of take-up and the need to build in sufficient flexibility to enable the property market to operate efficiently, we recommend that the future need estimate is treated as a minimum guideline. Local Plans should enable land to be allocated and made available for development on a phased basis in order not to flood the market during the early years of plan implementation.

7.6. Having regard to a high level assessment of existing planned supply of employment land in the sub-region, our analysis concluded that there is potentially a minimum quantitative shortfall in readily available employment sites amounting to approximately 129 ha (as outlined in Table 4-19). This assessment should be subject to more detailed evaluation through the Local Plan process.

7.7. In conclusion, the LEP and the local authorities should plan for a minimum requirement of 129ha of employment land across the sub-region but aspire to deliver potentially more good quality employment land in order to offer the local and inward investment market sufficient choice and flexibility. Overall delivery should be carefully monitored and planned for across a variety of sites and locations that helps combat deprivation and provides jobs at a local and sub-regional level. Furthermore, local authorities should carefully plan and monitor levels of employment and housing growth to ensure a balance is maintained between the delivery of major employment sites and the delivery of their housing strategies.

The case for strategic employment sites

7.8. Based on the assessment of quantitative, strategic and market considerations the sub-region would benefit from the provision of at least one new major employment site. We have argued that qualitative factors are the primary drivers behind the need to identify one or more strategic employment sites. The role of strategic employment sites should be to help a local economy take a step-change in economic performance and profile. Inward investors are footloose and competition between locations is steep and indeed, often extends internationally. Consequently, in considering the identification of strategic sites, it is important to be focused on the purpose for doing so and to avoid the temptation of perceiving such sites as a 'one-stop-shop' in terms of planning policy. Whilst a component of local employment needs may well be accommodated on strategic sites, it is essential that the offer to the inward investment market is not diluted.

7.9. Coventry and Warwickshire is a successful business location that attracts both domestic and foreign investment and competes for the attraction and safeguarding of businesses at the regional, national and international levels. Its success is based on a range of factors including its strategic location at the heart of England, its good accessibility and infrastructure, the availability of a highly skilled labour force and the availability of a good portfolio of employment sites.

7.10. Maintaining a varied, high quality supply of employment sites will be critical for ensuring the sub-region remains competitive and attractive as a prime business location that enables new businesses to start up, existing businesses to grow and established businesses to move to the area. The West Midlands region as a whole is highly competitive and schemes like UK Central and the proposed High Speed 2 rail link are expected to have major impacts on the regional economy and will also present Coventry and Warwickshire with fresh challenges and opportunities.

7.11. As the UK economy takes increasingly confident steps towards long-term economic growth and the sub-region's key business sectors continue to exhibit strong growth potential, it is important that Coventry and Warwickshire remains well placed to take full advantage of emerging economic opportunities. This is reflected in CWLEP's Strategic Economic Plan which identifies the availability of employment sites as fundamental to improving the sub-region's competitive edge and enabling it to attract new investors and retain local businesses in support of its key economic sectors and wider business growth.

7.12. In this context, it is recommended that CWLEP and the individual local authorities consider the identification and allocation of a small number of clearly sector-focused strategic employment sites that would be large and flexible enough to meet future business needs. These needs particularly should appeal to prioritised growth sectors while providing new employment opportunities for Coventry and Warwickshire's residents.

7.13. Following the assessment of a number of potential sites, including sites put forward following CWLEP's "open-call for sites" exercise, the Coventry and Warwickshire Gateway site was assessed to be best placed to fulfil the leading role as the sub-region's premier strategic employment site for the following reasons:

- It is of sufficiently large size;
- It demonstrates a high degree of strategic policy fit;
- It is well located and close to one of Coventry and Warwickshire's areas of greatest need;
- Following the implementation of the identified infrastructure improvements it is expected to have good levels of accessibility;
- It is well placed to meet the needs of the sub-region's key growth sectors including advanced manufacturing and engineering; research and development; and logistics and to support the growth plans of the sub-region's Universities;
- It has the potential to be attractive to regional, national and international investors; and

- Extensive work has already taken place in terms of the planning for the development of the site. Provided the planning application for the development of the site is successful at the upcoming call-in inquiry, the site has the potential to come forward for development within a reasonable time frame.

7.14. In addition, from the long-list of major sites assessed as part of this study, we consider that two other sites offer significant potential to play a strategic employment role in a manner complementary to the Coventry and Warwickshire Gateway.

- Ansty Park – B1 and high technology uses.
- Friargate – Centre office occupiers.

7.15. As highlighted in section 6, the Gaydon/Lightorne Heath site potentially plays a significant sub-regional and even wider role. However, it is reserved for a known, single occupier which means that it will not be available to the open market and therefore should be considered separately for the purposes of this study.

7.16. The purpose for also identifying these sites with a strategic employment role reflects primarily the importance of offering the market sufficient choice across sector and economic activities which have potential for significant growth in the CWLEP area.

Appendix A: Stakeholders Consultations

A.1 The stakeholder consultation event held in Leamington Spa in January 2014 was attended by representatives of the following organisations:

- AC Lloyd Group of Companies;
- Boston Fieldgate;
- CBRE;
- Coventry & Warwickshire Chamber of Commerce;
- Coventry City Council;
- Deeley Group;
- Holt Commercial;
- IM Properties;
- Invest in Warwickshire;
- Jones Lang LaSalle;
- Roxhill Developments;
- Rugby Borough Council;
- Savills;
- Shortland Horne;
- Shortland Penn + Moore;
- Stoford Developments;
- Stratford-on-Avon District Council;
- Turley Associates;
- Warwick District Council; and
- Warwickshire County Council.

Appendix B: Assessment of Potential Strategic Employment Sites

Site Name	**WHITLEY BUSINESS PARK**	
Background	The site masterplan proposes up to 1.1 million sq ft of office and industrial accommodation in a parkland setting. A mix of bespoke and speculative development is envisaged. There are three phases/parts to the site: Lakeside, Riverside and Woodside situated around the established Jaguar Land Rover Engineering Centre. The Lakeside and Riverside phases are intended primarily for B1 office development; Woodside for industrial and distribution. Funding of £6.5 million has now been secured from the Regional Growth Fund for highway access resolving the provision of transport infrastructure, work is due to start in summer of 2014.	
General Details		
Local Authority Area	Coventry City	
Promoter/Contact	St.Modwen/Savills/ Shortland Penn and Moore Mark Watkins – St.Modwen; Nick Williams – Savills; Justin McVay –Shortland Penn and Moore	
Planning Status	Site has planning permission.	
Proposed Uses	B1, B2, B8, A1 – but mostly B1	
Area	Total Site: 37.8 ha	Remaining Area : 24 ha
Suitability		
Access to amenities	Potentially Reasonable: The outline planning permission indicates a shop and crèche. Other amenity provision can be considered to include extensive landscaped areas and access to the Stonebridge Meadows Nature Reserve.	
Accessibility by public transport	Poor: Some bus services (X17 and X19) to Jaguar Land Rover, but Whitley Business Park not well served by buses at present.	
Accessibility to strategic transport network	Excellent: The site adjoins the A45 close to its junction with the A46.	
Links/proximity to areas of high unemployment	Good*:* Within 2 km of Binley & Willenhall Ward which has one of highest rates of worklessness in the LEP area.	
Neighbouring Uses	Positive: The presence of the Jaguar Engineering Centre in the centre of the site is a positive factor in the context of this site, as is the surrounding mature landscape.	
Relationship to strategic corridor	Good: Within 2 km of the north/south strategic growth corridor.	
Suitability for LEP's targeted growth sectors	Good: Site is adjacent to Jaguar Land Rover, so good location for automotive supply industries, but would need change of permission from B1 use. If no change in intended use, then should lead to growth in professional services.	
Suitability of site for intended use	The Lakeside phase is already well underway, and agents report good levels of interest in other phases of development particularly in units of 20,000 to 100,000 sq ft.	
Constraints on delivery		
Access	Works needed to create new bridge over the A444 with direct access via a new slip road from the A444 towards Whitley. Works are due to be completed in June 2015.	
Contamination	None	
Environmental Designations	Areas of ecological and landscape value have been safeguarded and taken into account in scheme design.	
Flooding	Flood plain taken into account and protected through scheme design.	

Site Name	**WHITLEY BUSINESS PARK**	
Ownership	None – owned by St Modwens	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	Sub-Regional
	Delivery	Early/Medium: Good prospects for occupation of remaining land before April 2019.

Site Name	**LYONS PARK**	
Background	Lyons Park is located on the western outskirts of Coventry close to the A45 and occupies Jaguar's former Brown Lane site. Outline planning consent was granted in 2009 for 800,000 sq ft of B2 (industrial) and B8 (industrial / storage distribution) accommodation and 75,000 sq ft of B1 (office). B2 Industrial and B8 Distribution uses are proposed in large units of up to 88,000 sq ft on 10 hectares (West Sector) and smaller high tech industrial and office uses (B1) on 9.2 hectares (East Sector). Jaguar still retain a 7 hectare site and there is a possibility that the site may produce lightweight 'E' types.	
General Details		
Local Authority Area	Coventry City	
Promoter/Contact	Homes and Community Agency/Goodman HCA - Steve Holland; Goodman – Nigel Dolan	
Planning Status	Planning Permission	
Proposed Uses	B1, B2, B8.	
Area	Total Site: 16.5 ha	Remaining Area : 16.5 ha
Suitability		
Access to amenities	None: No facilities within 800 metres	
Accessibility by public transport	Reasonable: Buses run every 30 minutes on route 7 along Browns Lane between between 7 am and 7 pm	
Accessibility to strategic transport network	Good/Reasonable: The site is accessed from Coundon Wedge Drive (B4076) which is a 1.5 km drive from the A4114 and just over 2 km to the junction of the A4114 with the A45. However, Coundon Wedge Drive provides a direct link to the A4114 with no other frontage accesses.	
Links/proximity to areas of high unemployment	Reasonable: Within 2 to 10 km of areas of high unemployment with reasonable public transport connections	
Neighbouring Uses	Neutral: The continued presence of Jaguar may be a positive factor for automotive businesses, but noise generated may deter some businesses.The site sits on the north western edge of Coventry with suburban residential uses to the west and farmland to the east.	
Relationship to strategic corridor	Reasonable: Has fairly good connections with the A45	
Suitability for LEP's targeted growth sectors	Moderate: Site may attract large scale logistics or manufacturing, particularly if Jaguar retain a presence on site.	
Suitability of site for intended use	High: Mix and proportion of uses proposed in planning permission appear soundly based.	
Constraints on delivery		
Access	None	
Contamination	Site clearance has already taken place.	
Environmental Designations	None	
Flooding	None	

Site Name	LYONS PARK	
Ownership	None	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District
	Delivery	Long Term: May take some time to find the right occupiers for this site

Site Name	FRIARGATE	
Background	Friargate aims to provide 300,000 sq m (3.2 million sq ft) of floorspace in 26 new buildings. Estimates of job provision in new office buildings rise to 15,000 new jobs during the life of the project. Proposals include two new hotels, new homes and supporting retail and restaurants. The masterplan includes a new pedestrian boulevard linking the station to the city centre.	
General Details		
Local Authority Area	Coventry City	
Promoter/Contact	Coventry City Council – Rodney Picher	
Planning Status	Outline planning permission, application submitted for reserved matters	
Proposed Uses	B1a	
Area	Total Site:15 ha	Remaining Area :15 ha
Suitability		
Access to amenities	Excellent: there are a wide range of facilities in close proximity to the site and more will be provided as part of the development.	
Accessibility by public transport	Excellent: Located adjacent to Coventry rail station and area is also served by several bus services.	
Accessibility to strategic transport network	Excellent: Adjacent to Coventry rail station and also adjacent to Junction 6 of the Coventry Inner Ring Road.	
Links/proximity to areas of high unemployment	Excellent: Within 2 km of areas with high levels of worklessness, with many public transport options.	
Neighbouring Uses	Positive: Rail station and wide range of city centre uses are in close proximity to the site	
Relationship to strategic corridor	Good: Well located in relation to the North/South Rail Link through Coventry Rail Station	
Suitability for LEP's targeted growth sectors	High: Site is well suited to cater for growth in professional services. The RICS is due to move into office accommodation in the site in 2017.	
Suitability of site for intended use	High: Site is ideally situated in a city centre location close to a main rail station.	
Constraints on delivery		
Access	None: Improvement works to the ring road are currently underway	
Contamination	None	
Environmental Designations	Environmental issues addressed through masterplan.	
Flooding	None	
Ownership	None – development co-ordinated by Friargate Coventry LLB	
Pylons	None	
Topography	None	
Other	Relocation of buses and taxis required.	

Site Name	FRIARGATE	
Conclusions	Impact	Regional: Site is at centre of the CWLEP economy and if implemented proposed vision for area would establish Coventry as a centre for professional services.
	Delivery	Long term: This is a long term project and completion is unlikely before 2024. May need support to ensure commercial viability.

Site Name	BIRCH COPPICE (Phases 2 and 3)	
Background	Birch Coppice was name of colliery which closed in 1987. Phase 1 of Birch Coppice, including the intermodal rail freight terminal, is all built out, with the exception of two small plots. Occupiers of Phase 1 include UPS, Euro Car Parts and a Volkswagen distribution hub. Phase 2 of Birch Coppice, to the south east of Phase 1, is partly developed and accommodates the Ocado distribution depot and two recently completed speculative buildings of 165,000 sqft each, which have been pre let to Bunzl Catering Supplies and Draexlmaier. Draexlmaier are suppliers of electrical car components and have chosen Birch Coppice as a good base from which to fulfil supply contracts for Jaguar Rover. Approximately 17.8 of Phase 2 remains available for development Phase 3 covers 31 ha and is located to the north of Phase 2. There are also further possibilities which will be shown in the forthcoming site allocations consultation on the local plan.	
General Details		
Local Authority Area	North Warwickshire Borough	
Promoter/Contact	IM Properties/Kevin Ashfield	
Planning Status	Site is identified in the North Warwickshire Site Allocations Plan Preferred Options published in May 2013 and the DOR 8 and DOR 11 site allocations are relevant. Planning permission has been approved for the two sections making up Phase 3 owned by IM properties and Hodgetts..	
Proposed Uses	B1c,B2, B8	
Area	Total Site:	Remaining Area: 48.8 ha
Suitability		
Access to amenities	None: No facilities within 800 metres	
Accessibility by public transport	Poor: Hourly services via the 766 bus service to Tamworth and Atherstone. Prospective developer of Phase 3 is offering support for enhanced public transport provision.	
Accessibility to strategic transport network	Excellent/Good: Accessed off the A5 within 2 km of Junction 10 of the M42	
Links/proximity to areas of high unemployment	Good: Site is situated in Dordon Ward which has above average levels of worklessness	
Neighbouring Uses	Positive: Birch Coppice is well established as a strategic site for large logistics.	
Relationship to strategic corridor	Good: Is located adjacent to the A5 strategic corridor	
Suitability for LEP’s targeted growth sectors	High: Birch Coppice is a proven location for large logistics and for automotive supply businesses.	
Suitability of site for intended use	High: B1c and B8 uses are the most likely to find the site attractive.	
Constraints on delivery		

Site Name	BIRCH COPPICE (Phases 2 and 3)	
Access	Remainder of Phase 2 has access in place. Phase 3 will be accessed in part through the existing estate. The area owned by Hodgetts (Hall End Units) will be accessed from the A5.	
Contamination	None – there are no known contamination issues	
Environmental Designations	None	
Flooding	Some limited flood risk issues associated with the Penmire Brook between Phases 2 and 3.	
Ownership	The site is owned in the main by IM Properties. Some land is owned by Hodgetts. Some additional land is owned by the Borough Council and CISWO.	
Pylons	None	
Topography	Land remodelling will be required to form development platforms	
Other	Extensive regarding to be done to create development platforms.	
Conclusions	Impact	Regional: Large site in location with high demand especially for logistics.
	Delivery	Early/Medium: Remainder of Phase 2 ready for development. Planning permission in place for Phase 3

Site Name	DAW MILL	
Background	Site is situated in a countryside location roughly midway between Coleshill and Nuneaton. Closure of Daw Mill colliery was announced in 2013 following a major fire. Site clearance works are well advanced. At the peak of its operations the colliery provided work for 2,400 people. Site is identified in the LEP's Strategic Economic Plan as a 'future priority sub-regional employment site'. The net developable area is nearly 30 ha. Proposed development likely to be 71,488 sq metres in a range of B1,B2 and B8 uses. Harworth Estates say site's unique assets are large available power supply/grid connection and rail connections. Interest is anticipated from energy related businesses and those wishing to utilise the rail head together with SME's looking for a different offer to Hams Hall/Birch Coppice.	
General Details		
Local Authority Area	North Warwickshire Borough Council	
Promoter/Contact	Harworth Estates/Tim Love	
Planning Status	No permission or local plan allocation. Outline planning application expected in June 2014. A masterplan has been prepared and has been subject to pre-application consultation	
Proposed Uses	B1, B2, B8	
Area	Total Site: 44 ha	Remaining Area: 44 ha
Suitability		
Access to amenities	None: No facilities within 800 metres	
Accessibility by public transport	None: but might be possible to require developers/occupiers to support a dedicated bus service	
Accessibility to strategic transport network	Reasonable: The site is rail served which is a major factor in its favour, however, road connections are poor and gained through indirect 'B' class roads. It is 9 km by the B4114 to the nearest 'A' road.	
Links/proximity to areas of high unemployment	Reasonable: The site is located on the edge of the Arley and Whitacre Ward which has above average levels of worklessness but a relatively sparse population of 5,471 in the 2011 census.	
Neighbouring Uses	Neutral: Site is surrounded by arable farmland. The nearest employment areas of any significance are industrial estates 11 km away at Coleshill.	

Site Name	**DAW MILL**	
Relationship to strategic corridor	Poor: Site is poorly related to strategic corridors.	
Suitability for LEP's targeted growth sectors	Low: Apart from rail served businesses, the site has no obvious advantages as a business location so the site may only appeal to a relatively limited range of users.	
Suitability of site for intended use	Moderate/Low: Site does not possess ideal suitability as a general business location. Rail access and power supply may make site attractive to businesses where these factors are a major factor in locational decisions.	
Constraints on delivery		
Access	Improvements required to local road network	
Contamination	Substantial remediation required	
Environmental Designations	None	
Flooding	Site abuts the River Bourne and includes areas classed as Flood Zone 3. Drainage infrastructure will need to be improved.	
Ownership	None – site in ownership of Harworth Estates	
Pylons	?	
Topography	Land remodelling will be required to form development platforms	
Other	Upgrading needed for broadband access and possibly for rail hub	
Conclusions	Impact	District
	Delivery	Long Term – the Borough Council has been informed that there is substantial interest in the site. However, it would be advisable not to anticipate any large scale development (i.e. units of over 10,000 sq m) there in next 5 years.

Site Name	**HOLLY LANE ATHERSTONE**	
Background	Holly Lane is home to the UK and Irish HQ of Aldi Stores. The site also includes one of Aldi's distribution centres. The HQ of TNT Express is also on Holly Lane.	
General Details		
Local Authority Area	North Warwickshire Borough	
Promoter/Contact	Aldi/Richard Labbett	
Planning Status	Site is identified as option EM2 (site ATH15) of the Site Allocations Plan Consultation Document published in May 2013. The Plan states that 6.9 ha are to be safeguarded for the future expansion of Aldi. The Core Strategy, subject to Public Examination in early 2014, also states that 6.9 ha at Holly Lane will be safeguarded for the needs of the landowner.	
Proposed Uses	B1, B2, B8	
Area	Total Site: 6.9 ha	Remaining Area : 6.9 ha
Suitability		
Access to amenities	Poor: Atherstone town centre is more than 800 metres from the site and with the exceptions of a public house there are no closer facilities.	
Accessibility by public transport	Poor: Infrequent bus services available 700 m from the site on the A5. Atherstone rail station is within 800 metres of the site and provides hourly services linking Atherstone to the local towns of Tamworth, Nuneaton and Rugby, and further afield to Crewe and London Euston.	
Accessibility to strategic transport network	Good: within 1 km of the A5, also there is a train station at Atherstone within 800 metres.	
Links/proximity to areas of high unemployment	Good: Site is situated in Atherstone North ward which has above average levels of worklessness and is within 1 km of Atherstone Central Ward which has high levels of worklessness.	

Site Name	HOLLY LANE ATHERSTONE	
Neighbouring Uses	Positive: TNT HQ is located to the south of the site together with other employment uses, Aldi's offices and distribution depot are to the west of the site.	
Relationship to strategic corridor	Good: Within 500 km of the A5 strategic corridor.	
Suitability for LEP's targeted growth sectors	High: If the site is not required by Aldi, the site could be attractive for Large Logistics or for automotive supply industries.	
Suitability of site for intended use	High: Presumably Aldi have indicated that they may have a need to accommodate future expansion on the site. It would clearly be well suited if this proves to be the case for B1, B2 or B8 uses.	
Constraints on delivery		
Access	Work required to Holly Lane roundabout and possibly to a bridge over the West Coast Mainline Railway.	
Contamination	None	
Environmental Designations	None	
Flooding	Part of the site (at the eastern end) falls within Flood Zone 3.	
Ownership	None – site owned by Aldi	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District: Site is relatively small.
	Delivery	Long Term: Most off site infrastructure is already in place, but decision is in hands of Aldi. Put in 5 to 10 year category.

Site Name	BERMUDA EXTENSION 1	
Background	The existing Bermuda Park Estate is a mixed leisure, business and industrial park of over 53 ha, named after the nearby former pit village of Bermuda. Leisure facilities include a multiplex cinema, bowling alley, gym, a pub and a number of restaurants. Business uses are a mix of light industrial and distribution uses for occupiers serving local or sub-regional markets. Technology firms include UTL Electronics and RS components. Automotive firms include IDIADA who provide brake testing services. North Warwickshire & Hinckley College's Innovation Centre is also located in Bermuda Park. Bermuda Extension 1 is located to the south west of the existing estate. The site is in two parts, north and south of Griff Lane. The land is currently used as farmland.	
General Details		
Local Authority Area	Nuneaton and Bedworth	
Promoter/Contact	Arbury Estates. Contact Adam Weaver at Smiths Gore.	
Planning Status	Development of the site is proposed in Policy DEV3, Bermuda Extension 1 (ECO1) Strategic Employment Site of the Nuneaton and Bedworth Preferred Options published July 2013. For details of what is required for this development site see para. 11.23 of the Preferred Options.	
Proposed Uses	B1,B2, B8	
Area	Total Site: 16 Ha	Remaining Area: 16 Ha
Suitability		
Access to amenities	Reasonable: Over 3 facilities (café/restaurants, pub) within 800 metres	
Accessibility by public transport	Reasonable: Bus services every 20 to 30 minutes from Bermuda Park into Nuneaton between 7 am and 7pm.	

Site Name	BERMUDA EXTENSION 1	
Accessibility to strategic transport network	Good: Adjacent to A444 dual carriageway and within 4 km of Junction 3 of the M6	
Links/proximity to areas of high unemployment	Reasonable: Within 3 km of area of high unemployment.	
Neighbouring Uses	Positive: Proximity to existing business uses on Bermuda Park to the north is an advantage as is rural landscape to the south.	
Relationship to strategic corridor	Good: Proximity to the A444 means site is well aligned to the North South strategic corridor.	
Suitability for LEP's targeted growth sectors	Low*:* Relatively small size of site unlikely to be attractive to large manufacturers or logistics. May be of interest to automotive supply industry.	
Suitability of site for intended use	Moderate: As a general location the site is likely to be attractive to a range of B1, B2 and B8 uses. However, the characteristics of the site seem most suited to B1 development. However, the Council want B1a office development to locate in the town centres rather than in out of town locations.	
Constraints on delivery		
Access	Some relatively modest off site highway improvements required, however, access to the northern area of the site needs to be resolved.	
Contamination	None.	
Environmental Designations	Griff Lodge Farmhouse and Griff Lodge are Grade II listed buildings in close proximity to the site, whilst to the west of the site Arbury Mill Farm is also listed. In addition the historic garden associated with Arbury Hall extends to include an area around Griff Lodge. Coventry Wood is an area of ancient woodland and would adjoin several site boundaries. This is also a local wildlife site.	
Flooding	None	
Ownership	None – all land within control of the Arbury Estates	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District: Site has many benefits in terms of general location but the appeal of the site to large enterprises is limited by its small size, lack of depth, and fragmentation. In addition the site has a number of environmental issues to address. May have greater suitability/marketability as a B1 location.
	Delivery	Medium: Owners are waiting for local plan process to run its course and then proceed with delivery. Start on site and substantial completion likely within 5 years.

Site Name	BERMUDA EXTENSION 2
Background	The existing Bermuda Park Estate is a mixed leisure, business and industrial park of over 53 ha, named after the nearby former pit village of Bermuda. Leisure facilities include a multiplex cinema, bowling alley, gym, a pub and a number of restaurants. Business uses are a mix of light industrial and distribution uses for occupiers serving local or sub-regional markets. Technology firms include UTL Electronics and RS components. Automotive firms include IDIADA who provide brake testing services North Warwickshire & Hinckley College's Innovation Centre is also located in Bermuda Park. Bermuda Extension 2 is located on brownfield and greenfield land to the east of the existing estate, split into two parts (west and east) by the B4113 Coventry Road.
General Details	

Site Name	BERMUDA EXTENSION 2	
Local Authority Area	Nuneaton and Bedworth	
Promoter/Contact	Arbury Estates and Warwickshire County Council Adam Weaver – Arbury Estates; Wendy Merchant – Warwickshire County Council	
Planning Status	Development of the site is proposed in Policy DEV3, Bermuda Extension 2 (ECO 2) Strategic Employment Site of the Nuneaton and Bedworth Preferred Options published July 2013. Details of what is required for this development site see are provided in paragraph 11.13 of the Preferred Options.	
Proposed Uses	B1, B2 and B8	
Area	Total Site:46 ha	Remaining Area : 46 ha
Suitability		
Access to amenities	Reasonable: Over 3 facilities (café/restaurants, pub) within 800 metres	
Accessibility by public transport	Good: Bus services 48, 55 and 57 provide services every 10 minutes between 7 am and 7 pm. NB. Accessibility would also improve with implementation of NUCKLE project with trains every 30 minutes stopping at Bermuda Station.	
Accessibility to strategic transport network	Good: within 1 km of Griff roundabout and A444 dual carriageway which would be accessed via a dualled section of the B4113. Site is approximately 5 km from junction 3 of the M6.	
Links/proximity to areas of high unemployment	Good: Within 2 km of area of high unemployment.	
Neighbouring Uses	Negative: Univar Limited located nearby on St.George's Way has a Hazardous Substances Consent for the operation of chemical warehousing and distribution centre including storage of nitrates. This may restrict uses on part of the site to B2/B8. A Gypsy and Traveller site occupies a position off the Coventry Road.	
Relationship to strategic corridor	Good: Occupies a location adjoining proposed new rail station on the North-South rail line and is also close to the A444 and the North-South strategic corridor.	
Suitability for LEP's targeted growth sectors	Moderate/Low: Site may attract large scale manufacturers or distribution uses, but uses are likely to be varied and include businesses aimed at local markets.	
Suitability of site for intended use	High: If various site issues can be resolved then site would offer a useful location for enterprises serving a local or sub-regional market. Uses are likely to be similar to those on the existing Bermuda Industrial Estate.	
Constraints on delivery		
Access	Off site works are required to signalise or improve the junction at Coton Arches roundabout, improve College St roundabout and the A444/ Eliot Way roundabout. Also emerging local plan suggests capacity improvements to town centres in Nuneaton and Bedworth	
Contamination	Land remediation required – although Borough Council do not consider this a major problem	
Environmental Designations	Design needs to protect and mitigate for any adverse impacts on Griff Hill Quarry SSSI to south west of site, and Griff Hollows Local Wildlife Site.	
Flooding	Part of the site is within area at risk of flooding and potential for Coventry Canal to overtop needs to be investigated. However, SFRA did not identify flooding as a major problem on this site, i.e. capable of being solved by site design.	
Ownership	Agreement to bring site forward still to be reached between landowners	
Pylons	Pylons and overhead lines cross part of the site.	
Topography	None	

Site Name	BERMUDA EXTENSION 2	
Other	If adopted, the emerging local plan would also require provision of renewable/low carbon energy through a decentralised energy facility, linked to the nearby Strategic Housing Site at Gipsy Lane.	
Conclusions	Impact	Sub-Regional: Large site but development likely to be varied in nature.
	Delivery	Long Term: Unlikely to come forward within 5 years. Site currently has a number of significant constraints affecting early delivery and potentially compromising viability which will need further investigation and resolution.

Site Name	ANSTY PARK
Background	Ansty Park occupies a former WW2 RAF site. The development seeks to facilitate the creation and sharing of knowledge. It is located adjacent to Junction 2 of the M6, aims to provide 1.5 million sq ft of space set in a landscaped parkland setting. Phase 1 is complete and includes the 136,000 sq ft (12,635 sq m) Sainsbury's Store Support Centre and the 120,000 sq ft (11,148 sq m) Manufacturing Technology Centre (MTC). The MTC specialises in a range of manufacturing processes that are particularly relevant to the high value manufacturing sector, it is supported by Universities and businesses like Rolls-Royce which are renowned for technological skills. Further development of MTC facilities (Aerospace and Academy buildings) are currently under construction with expected completion by July 2015. Proposals for Phase 2 comprise of six buildings (including the two additional MTC facilities referred to above) ranging in size from 34,000 sq ft (3,159 sq m) to 90,000 sq ft (8,361 sq m) or alternatively bespoke buildings designed to meet occupiers' specific requirements. The remaining development land to the south of Phase 2 is ideally suited to accommodate larger bespoke buildings whilst the land to the east of Phase 2 will cater for smaller bespoke requirements. Infrastructure works are underway to complete the site's spine road and enable development on the eastern side of Ansty Park, the location for a new £60 million high-temperature research centre that is to be built as a joint collaboration between the University of Birmingham and Rolls-Royce. This building will be used to develop future generations of aero engines and is being funded through a £40 million investment by Rolls-Royce, matched by a £20 million government grant through the Higher Education Funding Council for England.
General Details	
Local Authority Area	Rugby Borough
Promoter/Contact	Homes and Communities Agency/Steve Holland
Planning Status	Paragraph 8.17 of the Adopted Rugby Core Strategy (June 2011) states: "Policy PA8 of the Regional Strategy for the West Midlands (2008) defines the employment site at Ansty, as shown on the proposals map, as a Major Investment Site. The site is of strategic significance to the regional economy and has been designated by Advantage West Midlands as one of their Impact Investment Locations, where public sector finance has been focused in order to deliver the most benefit for the Region. The MIS is sustainably located in proximity to the Strategic Road Network and has the benefit of planning permission. In order to respect its Green Belt surroundings and the sites objectives, development should be delivered in accordance with the approved outline planning consent." Original planning permission R/91/1069/14999/OP
Proposed Uses	B1 and High Technology Business Park

Site Name	ANSTY PARK	
Area	Total Site: 40 ha	Remaining Area (Gross): 24.25 ha
Suitability		
Access to amenities	Poor.	
Accessibility by public transport	Reasonable: The X30 bus service connects Ansty Park to Coventry city centre and its main transport links with services every 30 mins between 7am and 7 pm.	
Accessibility to strategic transport network	Excellent: Close to Junction 2 of the M6	
Links/proximity to areas of high unemployment	Good: Within 2 km of area of high worklessness.	
Neighbouring Uses	Positive: Rolls-Royce occupies a site to south of the Park. In the context of this site, such a neighbour is a positive asset. In the longer term there are proposals to link the Ansty site with the Rolls-Royce site via a new road access.	
Relationship to strategic corridor	Good: Within A46 strategic corridor.	
Suitability for LEP's targeted growth sectors	High: Remaining land can accommodate both large and small units for high technology firms.	
Suitability of site for intended use	High: Site is well suited to its intended uses, with its capacity to create a park style environment for high technology companies, good access onto the strategic highway network and the presence of Rolls-Royce as a close neighbour	
Constraints on delivery		
Access	None	
Contamination	None	
Environmental Designations	None	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other	None	
Conclusions	Impact	Sub-regional: likely to be attractive to high technology firms
	Delivery	Early/Medium: infrastructure in place

Site Name	PROLOGIS CENTRAL PARK, RUGBY	
Background	Most of the site has been developed and occupiers include GAP's European HQ, Pearson (educational supplies) and The Pallet Network (TPN). Automotive Insulations have a 69,000 sq ft unit. Two plots remain to be let.	
General Details		
Local Authority Area	Rugby Borough	
Promoter/Contact		
Planning Status	Detailed Planning Consent covers remaining land	
Proposed Uses	B1, B2 and B8	
Area	Total Site:	Remaining Area : 6.23 ha
Suitability		
Access to amenities	Good: Range of facilities including two convenience stores, butchers, takeaway, hairdressers, and café in Central Park Local Centre.	

Site Name	**PROLOGIS CENTRAL PARK, RUGBY**	
Accessibility by public transport	Reasonable: Bus Services from Central Park Local Centre every 30 minutes between 7 am and 7 pm.	
Accessibility to strategic transport network	Excellent: Site is accessed off the A426 and there is easy access to Junction 1 of the M6 within 1 km of the site entrance. The site is also only 3 km from the M1.	
Links/proximity to areas of high unemployment	Reasonable: Within 5 km of areas of high worklessness in central Rugby	
Neighbouring Uses	Positive: Neighbouring uses to remaining land are all employment uses in high quality working environment	
Relationship to strategic corridor	Reasonable: Within 3 to 4 kilometres of the A5.	
Suitability for LEP's targeted growth sectors	High: proven location for attracting large logistics and technology firms.	
Suitability of site for intended use	High: site has excellent location for B1, B2 and B8 uses needing a quality site and easy access to regional and national markets	
Constraints on delivery		
Access	None	
Contamination	None	
Environmental Designations	None – masterplan includes green buffer on western edge of site adjoining Swift Valley Country Park and Local Nature Reserve)	
Flooding	None	
Ownership	None	
Pylons	Yes	
Topography	None	
Other		
Conclusions	Impact	Local: Only 6.23 ha remaining on this site
	Delivery	Early: Development of site likely to be complete in next two years

Site Name	**PROLOGIS PARK, RYTON**	
Background	Prologis Park, Ryton occupies the site of the former Peugeot works, and provides opportunities for buildings of between 100,000 to 500,000 sq ft. Most of the site has been developed and occupiers include Network Rail, LG Electronics and Freeman, event organisers. Agreement has recently been reached with UK Mail for a 21,460 sqm office and mail sorting facility that will include a 3,375 sqm head office building. Three plots are available, able to accommodate buildings of 40,000 sqm, 32,500 sqm and 15,800 sqm respectively.	
General Details		
Local Authority Area	Rugby Borough	
Promoter/Contact	Prologis/Alan Sarjant	
Planning Status	Planning Permission – most of site already built and occupied	
Proposed Uses	B2 and B8	
Area	Total Site: 56 ha	Remaining Area : 26.9 ha
Suitability		
Access to amenities	None: No facilities within 800 metres	
Accessibility by public transport	Poor: Buses (580 service) every two hours from Ryton-on-Dunsmore	

Site Name	PROLOGIS PARK, RYTON	
Accessibility to strategic transport network	Excellent/Good: the site is accessed directly off the A423 with easy access to the adjacent A45	
Links/proximity to areas of high unemployment	Good: Within 2 km of area of Binley and Willenhall ward which has high levels of worklessness.	
Neighbouring Uses	Positive: The site is surrounded by open countryside	
Relationship to strategic corridor	Good: On the North-South corridor including adjacent to the A45	
Suitability for LEP's targeted growth sectors	High: Proven suitability for large manufacturing and logistics firms.	
Suitability of site for intended use	High: Proven suitability for B2 and B8 uses	
Constraints on delivery		
Access	None	
Contamination	None – remediation complete	
Environmental Designations	None	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	Sub-Regional– site has good road connections but rather isolated from adjacent community
	Delivery	Early – site likely to be fully occupied in next two years. 30ha was developed in an 18 month period.

Site Name	RUGBY GATEWAY	
Background	The site forms part of a Sustainable Urban Extension which includes residential development to the south of the Employment site. Rugby Gateway is allocated for 36 ha of employment land and is intended to be used for a mix of B1c, B2 and B8 uses with buildings ranging from 50,000 sq ft to 1,000,000 sq ft. Groundworks are well advanced.	
General Details		
Local Authority Area	Rugby Borough	
Promoter/Contact	Roxhill/Graham Pardoe	
Planning Status	Outline planning permission, plus site allocation in Rugby Core Strategy June 2011 Policy C3 Gateway Rugby Sustainable Urban Extension). Full planning permission granted for unit 1 for 5.5 ha with a total floorspace of 22,000sqm B8 development pre let to H&M is currently under construction. Full planning permission granted for unit 5 for 17 ha with total floorspace of 807,415sqm (granted 14/5/2014).	
Proposed Uses	B2, B8	
Area	Total Site: 36 ha	Remaining Area (Gross): 20.01 ha
Suitability		
Access to amenities	Reasonable: Range of facilities including convenience store and café in Central Park Local Centre within 400 metres of site but not very accessible on foot. More facilities should be provided as part of the mixed use urban extension.	
Accessibility by public transport	Reasonable: Bus Services from Central Park Local Centre every 30 minutes between 7 am and 7 pm.	

Site Name	RUGBY GATEWAY	
Accessibility to strategic transport network	Excellent: Site is accessed off the A426 and there is easy access to Junction 1 of the M6 within 1 km of the site entrance. The site is also only 3 km from the M1.	
Links/proximity to areas of high unemployment	Reasonable: Within 5 km of areas of high worklessness in central Rugby	
Neighbouring Uses	Positive: Prologis Central Park is on opposite eastern side of the A426 and M6 to the north. Farmland to the west and proposed new residential development to the south.	
Relationship to strategic corridor	Reasonable: Within 4 kilometres of the A5.	
Suitability for LEP's targeted growth sectors	High: the success of the adjacent Prologis Park shows this is an attractive location for attracting large logistics and technology firms.	
Suitability of site for intended use	High: site has excellent location for B1, B2 and B8 uses needing a quality site and easy access to regional and national markets	
Constraints on delivery		
Access	None	
Contamination	None	
Environmental Designations	None	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	Moderate
	Delivery	Early/Medium: Works have started on site, should be completed within 5 years.

Site Name	RUGBY RADIO STATION	
Background	The site of the former BT Radio Station is the subject of a proposed sustainable urban extension (SUE) to accommodate 5,000 to 6,200 homes and up to 31 ha of employment land in B1, B2 and units up to 5000 sq. metres of B8. (N.B. Permission granted for 29 ha) It is proposed that this should include an element of provision as new business incubation units. A key objective is to facilitate a long term structural change to the local economy that focuses on knowledge based employment served through excellent public transport links. Employment uses are to be mainly concentrated at the southern end of the SUE, in the closest location to J18 of the M1.	
General Details		
Local Authority Area	Rugby Borough	
Promoter/Contact	David Lock Associates/David Keene	
Planning Status	Site allocated in the Rugby Core Strategy June 2011 (policy S4) for mixed use development. Outline planning permission granted May 2014. Reserve matters application for Key Phase 1 has been submitted which includes 8.17 hectares of employment land. Therefore the site could start delivering on its employment land sooner but the rest of the employment site is subject to further phases of development which could be long term.	
Proposed Uses	B1, B2, B8	
Area	Total Site: 29 ha	Remaining Area : 29 ha

Site Name	RUGBY RADIO STATION	
Suitability		
Access to amenities	Good: the masterplan for the site proposes two local centres within 400 metres of the main employment area.	
Accessibility by public transport	Good: It is a requirement of the Core Strategy that high quality public transport services to Rugby Town Centre are provided to each phase of development prior to first occupations in that phase.	
Accessibility to strategic transport network	Excellent/Good: Site will have access to the A5, the A428 and will be within 2 km of J18 of the M1.	
Links/proximity to areas of high unemployment	Reasonable: Site will be within 5 km of areas of high levels of worklessness in central Rugby.	
Neighbouring Uses	Positive: The main employment area for category B use classes will abut the Daventry International Rail Freight Terminal which is a multi modal freight terminal with associated warehousing. The area is clearly an employment location of major strategic importance.	
Relationship to strategic corridor	Good: Site is adjacent to the A5 which has been identified as a strategic corridor	
Suitability for LEP's targeted growth sectors	Moderate: Site seeks to avoid large scale users who are well catered for elsewhere in the Rugby area, and is focussed on the knowledge economy. In terms of target growth sectors IT services may be the most appropriate. Much will depend on the quality of the final offer.	
Suitability of site for intended use	High: Site seeks to avoid large scale users who are well catered for elsewhere in the Rugby area, and is focussed on the knowledge economy. Much will depend on the quality of the final offer, however, there are likely to be spin off opportunities arising from DIRFT III for smaller scale suppliers of services and products.	
Constraints on delivery		
Access	The SUE scheme requires three new junctions onto the A428 and two new junctions onto the A5	
Contamination	It is acknowledged that further investigation in respect of potential contamination will be required on a phase by phase basis.	
Environmental Designations	None near to main proposed employment area	
Flooding	None near to main proposed employment area	
Ownership	Rugby Radio Station Limited Partnership (RRSLP) – a joint venture including BT and Aviva Investors have ownership or options on land	
Pylons	None	
Topography	None	
Other		
Conclusions	Regional Impact	Sub-Regional
	Delivery	Long Term: residential development on the SUE is not expected to start until 2016 and will be undertaken in phases over a 20 year period.

Site Name	ARDEN ROAD, ALCESTER
Background	This green field site is situated on the northern edge of Alcester to the north of Arden Road and the Arden Forest Industrial Estate.
General Details	
Local Authority Area	Stratford-on-Avon District Council

Site Name	**ARDEN ROAD, ALCESTER**		
Promoter/Contact	Planning Agent: Stansgate		
Planning Status	This site is allocated (Proposal ALC.3: North of Arden Road) in the Proposed Submission Core Strategy (June 2014) for 11 hectares of development. Seven hectares of this land currently lies within the Green Belt. Policy CS.10 proposes to remove this land from the Green Belt.		
Proposed Uses	B1, B2, B8		
Area	Total Site: 11ha		Remaining Area: 11 ha
Suitability			
Access to amenities	Poor: Less than 3 facilities within 800 metres. There is a restaurant, pub and a hotel relatively nearby, however no convenience facilities.		
Accessibility by public transport	Reasonable: Services between 20 to 40 minutes between 7 am and 7 pm on nearby Meadow Road to Stratford and Redditch.		
Accessibility to strategic transport network	Good: The site is just off the A435 Birmingham Road.		
Links/proximity to areas of high unemployment	Poor: Over 10 km from area of high unemployment		
Neighbouring Uses	Positive: Arden Forest Industrial Estate and Business Centre lie directly adjacent to south.		
Relationship to strategic corridor	Poor: Not in a strategic corridor.		
Suitability for LEPs targeted growth sectors	Low/Minimal: The site is unlikely to attract targeted strategic growth sectors, having greater appeal for businesses with a more local market.		
Suitability of site for intended use	High: The adjoining employment site shows clear demand for small and medium size B1, B2 and B8 uses.		
Constraints on delivery			
Access	It may be beneficial to improve accessibility by public transport and ensure that Arden Road has sufficient capacity to deal with the increase in traffic flow, particularly HGV's.		
Contamination	None		
Environmental Designations	Detailed archaeological investigation required.		
Flooding	The western periphery of the site lies within flood zones 2 and 3. Watercourse runs along southern boundary		
Ownership	None		
Pylons	None		
Topography	None		
Other	Extensive landscaping required within the site and along northern and western boundaries.		
Conclusions	Impact	Local – relatively small site from regional perspective which is likely to attract firms with local markets.	
	Delivery	Long Term	

Site Name	**BISHOPTON**
Background	Site is located to the north west of Stratford, north of the A46 and east of the A3400. Most of the site is currently in agricultural use, apart from Lower Langley Farm which supports a few B1 uses The proposed development provides the opportunity to utilise land and buildings that are currently used for a range of generally unattractive activities, including a caravan site.

Site Name	BISHOPTON	
General Details		
Local Authority Area	Stratford-on-Avon District Council	
Promoter/Contact	The Bird Group Planning agent: Peter Frampton	
Planning Status	Site is allocated as Proposal SUA 3 in the Proposed Submission Core Strategy (June 2014). Specified to comprise relocation of businesses from the Canal Quarter Regeneration Zone on a minimum of 9 hectares and uses to help facilitate the relocation process. To enable this Policy CS.10 proposes to remove the land from the Green Belt.	
Proposed Uses	B1, Sui Generis	
Area	Total Site: 15ha	Remaining Area:15ha
Suitability		
Access to amenities	Poor: Less than 3 facilities within 800m.	
Accessibility by public transport	Good: Stratford Parkway Rail Station is within 600m and Park & Ride on Bishopton Road is within 400m with services every 5-10minutes. Provision of frequent bus services into the site is to be a requirement of development.	
Accessibility to strategic transport network	Good: A3400 Birmingham Road and A46 adjacent to site. Railway: Stratford-upon-Avon, Parkway Rail Station 600m	
Links/proximity to areas of high unemployment	Poor: Over 10 km from area of high unemployment	
Neighbouring Uses	Neutral: Mostly agricultural fields, a couple of residential properties and a car showroom.	
Relationship to strategic corridor	Good: Site close to A46 strategic corridor.	
Suitability for LEPs targeted growth sectors	Low: Site is primarily intended to relocate existing businesses.	
Suitability of site for intended use	High: Site is well suited to its intended uses, with its capacity to create a park style environment for office and research and development uses and for uses such as car showrooms relocating from the Canal Quarter.	
Constraints on delivery		
Access	Improvements to Bishopton Roundabout as required by Highways Agency.	
Contamination	None	
Environmental Designations	No designations but site includes area of woodland	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other	None	
Conclusions	Impact	Local – site is mostly intended for relocation and expansion of companies in the town.
	Delivery	Long term

Site Name	CODEMASTERS, SOUTHAM
Background	Codemasters Campus is an existing facility, located to the south of the A425 approximately 1.5km to the west of Southam on the A425. Facilities currently support over 500 employees. The company is currently considering a range of options for how it will realise its growth ambitions.

Site Name	CODEMASTERS, SOUTHAM	
General Details		
Local Authority Area	Stratford-on-Avon District Council	
Promoter/Contact	Codemasters	
Planning Status	No local plan allocation. This site has a resolution to grant permission (subject to a s106) for "Demolition of existing buildings with the exception of 4-storey office building and erection of new Class B1 office campus up to 15,000 sq.m gross internal, ancillary D2 leisure facilities up to 2,000 sq.m gross internal, change of use and extension of existing 4-storey office building to provide up to 100 bed ancillary staff accommodation, new access off A425 and associated car parking and landscaping." (ref: 12/00749/OUT).	
Proposed Uses	B1, B2, B8,C1,D1	
Area	Total Site: 6.5 ha	Remaining Area: 6.5 ha
Suitability		
Access to amenities	Poor: There are on-site catering facilities and the Masters Arms, Codemasters own lakeside pub. No other facilities within 800 metres	
Accessibility by public transport	Good: Bus stop adjacent with frequent services to Rugby, Banbury, Leamington Spa and other urban centres. Buses 63, 64, 65, 66. Every 17 minutes.	
Accessibility to strategic transport network	Good: direct access to the A425.	
Links/proximity to areas of high unemployment	Poor: Over 10 km from area of high unemployment	
Neighbouring Uses	Positive: Site has pleasant rural surroundings.	
Relationship to strategic corridor	Poor: Not in strategic corridor.	
Suitability for LEPs targeted growth sectors	High: Established software company with growth ambitions.	
Suitability of site for intended use	High: The site is well suited to be extended for high technology or office uses. The existing Codemaster premises offer a number of facilities which could be utilised by further development. There are also good transport links via the dedicated bus routes.	
Constraints on delivery		
Access	New vehicle access, road realigned and layby removed	
Contamination	None	
Environmental Designations	None	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other	Affected by proposed route of the High Speed Two railway.	
Conclusions	Impact	District
	Delivery	Medium Term

Site Name	GAYDON/LIGHTHORNE HEATH
Background	The site is located adjacent to the villages of Lighthorne Heath and Gaydon. It is largely bounded by the M40 to the east; the B4451 to the south; the B4100 to the west. New employment land is part of a wider proposal for a new settlement to include 3,000 (2,500 during plan period) homes, 100 hectares of land for

	expansion of Jaguar Land Rover (JLR), shops, services, community and leisure facilities, primary and secondary schools, parking and open space.		
General Details			
Local Authority Area	Stratford-on-Avon District Council		
Promoter/Contact	Commercial Estates Group and the Bird Group plus Jaguar Land Rover		
Planning Status	Site is allocated as Proposal GLH in Proposed Submission Core Strategy (June 2014). Policy CS.21 Economic Development proposes that approximately 100 hectares of land are identified at Gaydon/Lighthorne Heath to enable the expansion of Jaguar Land Rover's activities.		
Proposed Uses	B1, B2, D1		
Area	Total Site:100 ha for JLR		Remaining Area 100 ha for JLR
Suitability			
Access to amenities	Good: Amenities will be provided by the new development. The existing JLR site has a range of self-contained amenities.		
Accessibility by public transport	Reasonable: There are hourly bus services which serve the JLR facility and proposals to further improve the service to Coventry, Leamington Spa and Warwick.		
Accessibility to strategic transport network	Excellent/Good: The site is located adjacent the B4100 which is very good quality for its status and will be close to Junction 12 of M40 which is an important transport gateway into Coventry and Warwickshire.		
Links/proximity to areas of high unemployment	Reasonable: Within 2 to 10 km of area of high unemployment.		
Neighbouring Uses	Positive: The proposal is to expand the existing JLR site which lies adjacent. The proposals also intend on integrating with the existing residential area at Lighthorne Heath and proposed new settlement.		
Relationship to strategic corridor	Poor: Not close to identified strategic corridor.		
Suitability for LEPs targeted growth sectors	High: Proposal would allow for expansion of one of the region's key companies and employers.		
Suitability of site for intended use	High: The site would be very suitable for its intended use as it is an extension of what is already one of the region's biggest employment centres. The proposals as part of the Core Strategy are extensive and would see a comprehensive mixed use development of a large area over 30 years. Improvements to Junction 12 of the M40 are necessary to facilitate development and have been approved.		
Constraints on delivery			
Access	Significant infrastructure as part of the comprehensive development, including improvements to M40 Junction 12 and diversion of B4451 to create a new access. NB: This has already received £15m to enable it to more effectively handle the increased traffic generated by the success of Jaguar Land Rover and Aston Martin in Gaydon. This money came from Government (£9m), RGF (£3m) and WCC (£3m).		
Contamination	None		
Environmental Designations	Site is adjacent to Gaydon Coppice, a designated Ancient Woodland.		
Flooding	None		
Ownership	None		
Pylons	None		
Topography	None		
Other	None		
Conclusions	Impact	Regional – JLR is a major contributor to the sub-regional economy.	

	Delivery	Short – Medium- Long Term: If approved, new employment development is likely to start within next 2 years.

Site Name	GORCOTT HILL	
Background	Greenfield site on the north eastern edge of Redditch, lying north of the A4023 where it adjoins the A435. The site proposal has arisen as a result of joint working between Stratford-on-Avon District Council, Redditch Borough Council and Bromsgrove District Council which concluded that land in Stratford-on-Avon District should be identified for employment uses to meet the needs of Redditch.	
General Details		
Local Authority Area	Stratford-on-Avon District Council	
Promoter/Contact	Will Adams on behalf of Gorcott Hall Estate	
Planning Status	Site is allocated as Proposal REDD.2 in Proposed Submission Core Strategy (June 2014) for employment development. Policy CS.21 Economic Development proposes that 19 hectares of employment land are allocated to meet the specific needs of Redditch. To enable this, Policy CS.10 proposes to remove the land from the Green Belt.	
Proposed Uses	B1, B2, B8 uses (with at least 15% of floorspace being for Class B1 (a/b) uses).	
Area	Total Site: 7 ha	Remaining Area: 7 ha
Suitability		
Access to amenities	Reasonable: Over 3 facilities within 800 metres. There is a Londis, Gorcott Hall and Hollybush Inn restaurant fairly close to site.	
Accessibility by public transport	Poor: The 61 bus service which serves the site is hourly.	
Accessibility to strategic transport network	Good: A4023 and A435 adjacent to site.	
Links/proximity to areas of high unemployment	Good: Within 2 km of area of high unemployment	
Neighbouring Uses	Neutral: ‘A’ Roads adjacent to the south and east of the site which will provide good access but may cause noise issues. To the west of the site is Moons Moat North industrial estate which is a positive neighbouring use, considering the proposals for the site.	
Relationship to strategic corridor	Poor: Not in a strategic corridor.	
Suitability for LEPs targeted growth sectors	Low: Site addresses needs of Redditch not CWLEP objectives.	
Suitability of site for intended use	High: Site is in a prime location for employment development. It is situated on the periphery of Redditch and would serve as a good source of employment.	
Constraints on delivery		
Access	Need to provide new vehicle access off A4023 Coventry Highway. Traffic management measures on A435 may be required. Pedestrian/cycle links across A4023 to adjacent residential areas will be required.	
Contamination	None	
Environmental Designations	Grade II* Listed Gorcott Hall to the north east of the site. Mature hedgerows and trees on the site.	
Flooding	None	
Ownership	None	
Pylons	None	

Site Name	GORCOTT HILL	
Topography	None	
Other	None	
Conclusions	Impact	Local – site relates to the needs of Redditch not the CWLEP area
	Delivery	Medium Term. Road improvements required.

Site Name	WILDMOOR	
Background	Greenfield site on western edge of Stratford-upon-Avon. Site is currently at feasibility / viability stage. No delivery issues have been identified.	
General Details		
Local Authority Area	Stratford-on-Avon District Council	
Promoter/Contact	TDH Estates (Mark Beeston)	
Planning Status	Site is allocated as Proposal SUA.2 in Proposed Submission Core Strategy (June 2014). Specified that up to 10 hectares will be released during the plan period to 2031, plus additional land to correspond with the area taken up by businesses relocating from the Canal Quarter Regeneration Zone.	
Proposed Uses	Site allocated for employment uses comprising: (i) Class B1(a) office and Class B1(b) research and development uses, although scope for B1(c) light industry will be considered (ii) Relocation of businesses from the Canal Quarter Regeneration Zone During the plan period up to 10 hectares will be released, plus additional land to correspond with the area taken up by businesses relocating from the Regeneration Zone.	
Area	Total Site: 20 ha	Remaining Area: 20 ha
Suitability		
Access to amenities	Poor: Less than 3 facilities within 800 metres. Wildmoor Spa and Health Club opposite, petrol station within 800m.	
Accessibility by public transport	Reasonable: Bus Services 19 (every 33 minutes) and 229 within 800m. Provision of frequent bus services into the site is a requirement of development.	
Accessibility to strategic transport network	Good: South of A46 Alcester Road, and near A442 which leads into Town centre. Less than 2km to Stratford Parkway Station and Park and Ride with frequent services every 5-10 minutes.	
Links/proximity to areas of high unemployment	Poor: Over 10 km from area of high unemployment.	
Neighbouring Uses	Neutral: Mostly agricultural land with a Health spa opposite.	
Relationship to strategic corridor	Good: In A46 strategic corridor.	
Suitability for LEPs targeted growth sectors	Moderate: Site is not suitable for some of LEP targeted uses, but might be attractive to some high technology/IT uses.	
Suitability of site for intended use	High: Proximity to Stratford and public transport make this location suitable for the intended use for offices, research and development and light industry use.	
Constraints on delivery		
Access	Off-site highway improvements include access directly off Wildmoor Roundabout or proposed Western Relief Road improvements to Wildmoor Roundabout as required by Highways Agency.	
Contamination	None	

Environmental Designations	None	
Flooding	None	
Ownership	None – but involvement of developer required.	
Pylons	None	
Topography	None	
Other	None	
Conclusions	Impact	District – site is likely to be attractive to new companies looking to locate in the area and possibly high technology/It companies, but part of site will be used for relocation of businesses from the Canal Quarter.
	Delivery	Medium - Long Term: Yet to attract developer interest.

Site Name	**WINYATES GREEN TRIANGLE**	
Background	Greenfield site on the north-eastern edge of Redditch and is bounded by the A4023 to the North, the A435 to the east and residential development to its remaining western boundary Site is allocated as Proposal REDD.1 in Proposed Submission Core Strategy (May 2014) It has been established through joint working with Redditch Borough Council and Bromsgrove District Council that this area of land, although in Stratford-on-Avon District, should be identified for employment uses to meet the needs of Redditch.	
General Details		
Local Authority Area	Stratford-on-Avon District Council	
Promoter/Contact	Savills on behalf of HCA	
Planning Status	Proposal REDD.1: Winyates Green Triangle, Mappleborough Green in Proposed Submission Core Strategy (June 2014). Policy CS.21 Economic Development proposes that 19 hectares of employment land are allocated to meet the specific needs of Redditch.	
Proposed Uses	B1, B2, B8 uses (with at least 15% of floorspace being for Class B1 (a/b) uses).	
Area	Total Site: 12 ha	Remaining Area (Gross): 12 ha
Suitability		
Access to amenities	Poor: Just 3 facilities within 800 metres - a Londis, hotel and cleaners.	
Accessibility by public transport	Poor: The 61 bus service which serves the site is hourly.	
Accessibility to strategic transport network	Good: Site adjoins intersection of the A4023 and the A435.	
Links/proximity to areas of high unemployment	Good: Within 2 km of area of high unemployment.	
Neighbouring Uses	Neutral: 'A' roads adjacent to north and east of the site which provide good access, but also create noise issues. To the west of the site is a residential area; however dwellings are of a significant distance from the site so as to minimise impacts from any development. Moons Moat North industrial estate lies to the north which is a positive neighbouring use, considering the proposals for the site.	
Relationship to strategic corridor	Poor: Not in strategic corridor.	
Suitability for LEPs targeted growth sectors	Poor: Development of site will be related to the needs of Redditch not to the needs of CWLEP.	

Site Name	**WINYATES GREEN TRIANGLE**	
Suitability of site for intended use	High: Site is in a prime location for employment development. It is situated on the periphery of Redditch town centre and would provide a source of employment. The proximity of the road network is a major factor; however bus frequency could be improved.	
Constraints on delivery		
Access	Need to provide new vehicle access off A4023 Coventry Highway. Traffic management measures on A435 may be required. Traffic management measures on A435 and pedestrian/cycle links with adjacent residential areas will be required	
Contamination	None	
Environmental Designations	Lower House Grade II listed building to the south of the site.	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other	None	
Conclusions	Impact	Local – site relates to the needs of Redditch not the CWLEP area.
	Delivery	Medium Term: Road improvements required.

Site Name	**COVENTRY AND WARWICKSHIRE GATEWAY**	
Background	Proposal consists of two zones. Zone A is a proposed logistics park of up to 343,740 sqm of B2/B8 floor space of which up to 104,000 sqm will be B2 floor space. Zone B is a proposed technology hub that will include a mixture of A1, A3, A4, A5, B1 and C1 uses. According to the scheme's planning statement, Zone B will provide up to 65,000 sqm of B1 floor space primarily aimed at the high value automotive aerospace and digital technology sectors.	
General Details		
Local Authority Area	Warwick District (N.B. Scheme includes some highway works within Coventry City).	
Promoter/Contact	Coventry and Warwickshire Development Partnership Roxhill – Graham Pardoe; Oxalis Planning – John Holmes	
Planning Status	Application (ref W/12/1143) was called in by the Secretary of State in 2013 for his own determination, after the local planning authorities indicated their support for the proposal.	
Proposed Uses	A1, A3, A5, B1, B2, B8, C1 and D1.	
Area	Total Site: 121 ha	Remaining Area : 121 ha
Suitability		
Access to amenities	Good: Access to facilities is currently poor, but the planning application anticipates future provision of retail facilities, cafe and hot food takeaway. In addition, the proposal would also provide large areas of accessible green space.	
Accessibility by public transport	Good: Area is poorly served by public transport at present but proposal includes measures to secure high frequency bus links with local population centres, particularly Coventry.	
Accessibility to strategic transport network	Excellent: Proposal would result in easy access onto the A45	
Links/proximity to areas of high unemployment	Good: Site will have good public transport connections to central areas of Coventry parts of which have high level of worklessness, whilst Binley and	

Site Name	COVENTRY AND WARWICKSHIRE GATEWAY	
	Willenhall Ward which also has high levels of worklessness will be within 3 km of Zone A and 5 km of Zone B.	
Neighbouring Uses	Positive: The Gateway site is adjoined by the established Middlemarch Business Park and the Whitley Business Park which is being developed around the Jaguar Land Rover Engineering Centre. Both the gateway developments and these business parks should benefit from the close proximity and improved links. The two zones are situated north and south of Coventry Airport which accommodates air cargo services and executive flights. The impact on the Gateway is probably neutral as although the Gateway site might attract some airport related development there are also drawbacks in terms of noise and air pollution. There will not be a direct physical link between the Gateway development and the airport.	
Relationship to strategic corridor	Excellent: Site will be served directly off the A45 which is part of the strategic North/South corridor. Located strategically near intersection between A444/A45/A46 with good access to M6 and M40.	
Suitability of site for targeted growth sectors	High: Site would make an excellent location for advanced manufacturing and engineering and automotive supply industries given the site's accessibility to a trained workforce and local suppliers/clients, large logistics as evidenced by business on the adjoining Middlemarch Business Park and possibly IT Services. The site offers excellent potential as inward investment opportunity for major manufacturing and logistics occupiers.	
Suitability of site for intended use	High: Site is well located to accommodate a range of B1, B2 and B8 uses.	
Constraints on delivery		
Access	Package of highway proposals drawn up including construction of a new grade separated junction into the A45 Stonebridge highway and construction of a new link road through Jaguar Whitey to the A444.	
Contamination	Contamination needs to be investigated and managed/remediated, including former sewage beds. Proposals relating to this are included in the planning application.	
Environmental Designations	Brandon Marsh SSSI could be affected by proposals and also Stonebridge Meadows Local Nature Reserve. There are also impacts on protected species and priority habitats. Proposals include major mitigation proposals.	
Flooding	Proposed development areas fall outside of flood risk zones, however, elements of highways infrastructure do encroach onto areas identified as Flood Zone 3. In addition the remediation of the Rock Farm Water treatment works needs to take account of groundwater issues. Significant flood risk assessment, mitigation and sustainable drainage schemes will be required.	
Ownership	None – land controlled by Coventry and Warwickshire Development Partnership	
Pylons	None	
Topography	None	
Other	Two existing uses need to be relocated within the development area – Trinity Rugby Club and the Railway Museum.	
Conclusions	Impact	Regional: The site meets all major requirements for a strategic employment site or has clear proposals to overcome any drawbacks.
	Delivery	Early/Medium/Long: Roxhill developments are one of the main organisations involved with the proposal and have successfully developed most of the Rugby Gateway site. If the scheme is approved, the infrastructure works - including restoration and cleaning of despoiled land; construction of new highways; creation of development plots and

Site Name	COVENTRY AND WARWICKSHIRE GATEWAY	
		establishment of the landscape framework will take place between 2015 and 2018. The first buildings, on the Technology Park, could be available in 2016, with development progressing over the following 10 years.

Site Name	FEN END	
Background	The site was formerly used by the RAF. The air base closed in March 1958. Prodrive Kenilworth currently use the site as a proving ground/test track. Proposals emerged in 2006 for an expanded motor test track and research and development facility and outline planning permission was granted for Advanced Engineering Research and Development Campus (Class B1 (Business) Uses) for the Automotive and Motorsport Industries and Catalyst Centre.	
General Details		
Local Authority Area	Warwick District	
Promoter/Contact	100 Percent Properties	
Planning Status	Outline permission was granted in October 2007 for "Advanced Engineering Research and Development Campus (Class B1 (Business) Uses) for the Automotive and Motorsport Industries, Catalyst Centre, new access road and roundabout, infrastructure, parking, landscaping, including details of Catalyst building." (ref: W/06/0309). This permission was renewed in December 2011 for a further three years (ref: W/10/0893).	
Proposed Uses	B1	
Area	Total Site: 10 ha	Remaining Area: 10 ha
Suitability		
Access to amenities	None: No facilities within 800 metres	
Accessibility by public transport	None	
Accessibility to strategic transport network	Good: Site is currently accessed off a road leading to Honiley Road, which is a fairly narrow rural road within 500 metres of the A4177. Major improvements are planned to the access arrangements including a new roundabout on Honiley Road affording direct access to the site.	
Links/proximity to areas of high unemployment	Poor: Over 10 km by road from nearest area of high unemployment, and no public transport.	
Neighbouring Uses	Neutral: Semi-rural green belt surroundings provide an attractive landscape context semi-rural but neighbouring uses include a farm and residential property which may not be compatible uses for a test track and noisy activities.	
Relationship to strategic corridor	Poor: Not close to any strategic corridor	
Suitability of site for targeted growth sectors	High: Current planning consent targeted specifically at automotive and motorsport industries and Prodrive has a long association with site. Presence of the test track is a unique selling point which should be of appeal to this sector. Site is unlikely to be attractive to other targeted growth sectors.	
Suitability of site for intended use	High: Current planning consent targeted specifically at automotive and motorsport industries and Prodrive has a long association with site. Presence of the test track is a unique selling point which should be of appeal to this sector.	
Constraints on delivery		
Access	Improvements needed to Honiley Road to create new access	
Contamination	?	
Environmental Designations	Protected Species Issues	

Site Name	**FEN END**	
Flooding	None	
Ownership	None	
Pylons	None	
Topography	None	
Other	Utility upgrades required which may have to be funded by occupiers. Utilities upgrade would cost £750k to £1million for first phase and up to £2 million for the whole site.	
Conclusions	Impact	District: Site is not well located with regard to amenities, public transport, areas of unemployment, strategic corridors. Has niche appeal but will need to secure a high profile anchor use to inspire confidence in site by other business.
	Delivery	Medium Term: The Strategic Economic Pland includes Growth Deal funding requests for utilities upgrade and Superfast Broadband to support early delivery of the site. Also, City Deal has released funds to support access improvements.

Site Name	**THICKTHORN, KENILWORTH**	
Background	Site is part of a proposed sustainable urban extension that will also accommodate 760 dwellings on the edge of Kenilworth. The site is currently used by a sports club and development is dependent on successful relocation of the club.	
General Details		
Local Authority Area	Warwick District	
Promoter/Contact	Various landowners. Planning Consultant: Peter Frampton of Framptons	
Planning Status	Site is allocated in the Warwick District Publication Draft Local Plan 2011-2029 and identified as site E2 in Policy DS9. The emerging local plan (para. 2.32) states: “At Thickthorn employment land will be provided as part of the wider residential led development. The supply of good quality employment land in Kenilworth is limited and the site adjacent to the A46 provides the opportunity for mixed B1 and B2 employment development to meet local and the wider needs of the District. Other non B class uses will not be considered acceptable.”	
Proposed Uses	B1, B2	
Area	Total Site:8 ha	Remaining Area: 8 ha
Suitability		
Access to amenities	Reasonable: The emerging Local Plan indicates that a convenience store will be included in plans for the sustainable urban extension and may be complemented by other stores.	
Accessibility by public transport	Good : Several bus services to Kenilworth town centre and Warwick	
Accessibility to strategic transport network	Good: Proposed site is adjacent to the A452/A46 junction.	
Links/proximity to areas of high unemployment	Weak: Not close to areas of high worklessness or with good transport links to same.	
Neighbouring Uses	Neutral: Proposed site situated in urban fringe area with residential uses to north-west and A46 to south-east; not close to any existing business park or industrial estate.	
Relationship to strategic corridor	Good: Site is adjacent to the A46 and the North/ South strategic corridor	

Site Name	THICKTHORN, KENILWORTH	
Suitability of site for targeted growth sectors	Reasonable/Low: Site is unlikely to be attractive to or appropriate for large scale manufacturing, and logistics has been precluded by the emerging local plan. However, IT services is a possibility and site would be suited for offices (possibly professional services) for local companies.	
Suitability of site for intended use	High: Site will address lack of employment areas in Kenilworth. Emerging local plan states that the Employment Land Study identifies the need for more space for modern offices, which could successfully be accommodated here. If there is a shortage then this would provide an attractive site.	
Constraints on delivery		
Access	A Transport Assessment identifies a need for offsite works at St John's Gyratory and Thickthorn Roundabout to enable the site to come forward. The St John's Gyratory scheme is a signalisation of the four entry arms onto the junction. The proposed scheme for the Thickthorn Roundabout is a signalised roundabout with a new, un-signalised, entry arm to serve the development site to the northwest of the junction. The carriageway either side of the bridges would need to be widened to 3 lanes with 2 lanes retained on the bridges.	
Contamination	None	
Environmental Designations	The Thickthorn ancient woodland adjoins a small part of the proposed employment site.	
Flooding	None	
Ownership	In multiple ownership	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District: Not suitable for several target growth sectors identified by the LEP, but could attract professional services/IT and address local need for modern B1 development.
	Delivery	Long Term: Number of significant issues to address as part of a wider mixed use development and relocation of sports clubs necessary, so unlikely to see development within 5 years.

Site Name	TOURNAMENT FIELDS, WARWICK
Background	Tournament Fields is a partially developed business park located adjacent to Junction 15 of the M40 motorway to the south west of Warwick. The initial phase was the construction of Tournament Court, a 70,000 sq ft courtyard style office development which is now fully occupied. Other developments have followed on for Geberit, Eagle Burgmann, Pure Office and West Midlands Ambulance Service. Aston Martin reportedly interested in site for distribution centre and sub assembly.
General Details	
Local Authority Area	Warwick District
Promoter/Contact	Site was managed by Sackville Developments Ltd who have recently been taken over by the Derby based CWC Group,
Planning Status	Identified in Warwick District Local Plan (Publication Draft) (May 2014) as committed employment land. Policy EC3 (see table on p48). Detailed planning consent was granted in Jan 2014 for a 225,000 sq ft B8 warehouse/industrial unit.
Proposed Uses	B1, B2, B8

Site Name	TOURNAMENT FIELDS, WARWICK	
Area	Total Site: 20 ha	Remaining Area :15.5 ha
Suitability		
Access to amenities	Poor: There is a pub nearby but no other local facilities	
Accessibility by public transport	Reasonable: Bus Services approximately every 30 minutes	
Accessibility to strategic transport network	Excellent: Accessed off the A429 and close to Junction 15 of the M40 with the A46	
Links/proximity to areas of high unemployment	Reasonable: Within 4 km of areas of central Warwick with above average levels of worklessness with reasonable public transport connections	
Neighbouring Uses	Good: Two neighbouring hotels. New housing development to the north.	
Relationship to strategic corridor	Good: Site marks southern end of the A46 strategic corridor	
Suitability of site for targeted growth sectors	Moderate: Main appeal appears to be for B1 office use but site's location and attributes may attract research and development uses.	
Suitability of site for intended use	Good: Site is partially developed and attracting interest	
Constraints on delivery		
Access	None	
Contamination	None	
Environmental Designations	None	
Flooding	Site has areas identified as Flood Zone 2 and 3, however, the planning permission has presumably addressed these issues.	
Ownership	None	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District: Main appeal appears to be for B1 office use but site's location and attributes may attract research and development uses.
	Delivery	Early/Medium: Site has relevant permissions and is being actively marketed. Anticipate completion within 5 years.

Site Name	WARWICK TECHNOLOGY PARK, LAND ADJACENT
Background	This green field site is situated on the south eastern edge of Warwick to the north of Gallows Hill adjacent to the existing Warwick Technology Park. The site is part of a larger mixed use proposal including housing, local centre, primary schools and secondary school. The University of Warwick Science Park was established in 1982 as a joint venture company. The University acquired sole ownership of the Park in 2013. The Park's hub is in Coventry but has three satellite locations of which the Technology Park at Gallows Hill is one. Here, there are a range of small and medium sized units with the Innovation Centre offering very small units ranging from 20 to 150 sq metres aimed at ICT based companies.
General Details	
Local Authority Area	Warwick District
Promoter/Contact	Warwickshire County Council or Hallam Land Management (two alternative locations being considered)
Planning Status	Site is allocated in the Publication Draft of Warwick District Local Plan May 2014 as site E1 in Policy DS9.

Site Name	WARWICK TECHNOLOGY PARK, LAND ADJACENT	
Proposed Uses	B1 and B2	
Area	Total Site: 8 ha	Remaining Area : 8 ha
Suitability		
Access to amenities	None at present: no facilities in local area – provision of local centre proposed as part of wider mixed use scheme.	
Accessibility by public transport	Reasonable: Bus services run every 30 minutes to Leamington Spa and Warwick.	
Accessibility to strategic transport network	Good: Site is adjacent to the A452, 4 km from Junction 14 on the M40 and within 3 kilometres of rail stations at Warwick and Leamington Spa.	
Links/proximity to areas of high unemployment	Good: Site is within 2 km of area of high worklessness in Leamington Spa and also close to areas of above average worklessness in Warwick.	
Neighbouring Uses	Positive: The site benefits from its location adjacent to the existing successful technology park.The Heathcote Industrial Estate lies to the east of the A452.	
Relationship to strategic corridor	Reasonable: Site is within 3km of stations on the North/South Rail Corridor and within 6 km of Junction 15 of the M40 and the start of the A46 strategic corridor.	
Suitability of site for targeted growth sectors	High: The proximity of the site to the adjacent technology park will provide a desirable location for businesses, particularly new or growing businesses, in advanced manufacturing and research and development.	
Suitability of site for intended use	High: Site well suited to B1 and B2 uses, particularly B1.	
Constraints on delivery		
Access	Off site highway works likely and requirement for improvements to public transport.	
Contamination	None	
Environmental Designations	Heathcote Hill Farmhouse is a grade II listed building located just to the north west of the site.	
Flooding	None	
Ownership	Agreement needs to be reached with number of landowners to bring the mixed use development proposal forward.	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District: Excellent location for research and development and IT companies, but relatively small size.
	Delivery	Long Term: Clear demand for proposed uses in this location but some major issues to be addressed in wider development proposal. Development unlikely to begin within 5 years.

Site Name	STONELEIGH PARK
Background	Stoneleigh Park covers over 40 ha of land to the south west of Coventry on the former site of the National Agricultural Centre. With a 150 year lease from the Royal Agricultural Society, La Salle Investment Management aim to create a science park dedicated to rural sciences and innovation. The site houses the DEFRA funded Rural Innovation Centre and is home to the Agriculture and Horticulture Development Board. Stoneleigh Park has a special focus as a centre of rural excellence, and therefore has a distinctive role from other sites within the LEP area.
General Details	

Site Name	**STONELEIGH PARK**	
Local Authority Area	Warwick District	
Promoter/Contact	La Salle	
Planning Status	Site has consent for 116,284 sq m of additional floorspace of which the most significant components are a science, business, technology and innovation park (B1(a+b) - 32,991 sq m) and equine facilities, livestock and agricultural facilities, education and learning (D1 - 33,064 sq m).	
Proposed Uses	B1,C1, D1	
Area	Total Site: 20 ha	Remaining Area : 20 ha
Suitability		
Access to amenities	Good: Site has a cafe, shop, gym and nursery facilities on site	
Accessibility by public transport	Poor: There are only 5 buses a day to or from Coventry	
Accessibility to strategic transport network	Poor: Site is accessed off the B4113, 3 km from the A452 or A46	
Links/proximity to areas of high unemployment	Poor: Not close or accessible to areas of high or above average worklessness.	
Neighbouring Uses	Positive: Pleasant rural surroundings are asset to intended use	
Relationship to strategic corridor	Reasonable: Within 3 km of the A46 strategic corridor	
Suitability of site for targeted growth sectors	Moderate: Site is clearly not suitable for large scale logistics or manufacturing, but could develop niche for rural innovation. Access and transport issues need to be addressed.	
Suitability of site for intended use	Moderate: Site is well suited to proposed uses, although access and transport issues need to be addressed.	
Constraints on delivery		
Access	A roundabout (estimated cost of £1.1 million) is required at the Main Gate to ensure safety and ease congestion. New bridge and improved road infrastructure (estimated cost of £2.54 million) is needed to the north of the site to enable opening of Gate 3.	
Contamination	None	
Environmental Designations	A large number of listed buildings are associated with Stoneleigh Abbey to the south of the site	
Flooding	Flood zones 2 and 3 are associated with the River Avon where it forms the perimeter to the site.	
Ownership	None	
Pylons	None	
Topography	None	
Other		
Conclusions	Impact	District: Site is clearly not suitable for large scale logistics or manufacturing, but could develop niche for rural innovation. Access and transport issues need to be addressed.
	Delivery	Long Term: Unless off site highway infrastructure can be addressed, there seems little prospect of early delivery on this site.