

# BIG.

**Birmingham International Gateway**

**Birmingham Development Plan  
Examination Hearing Statement: Matter F  
September 2014**

**The BIG delivery partnership**



**PROLOGIS.**



**ASHFORD  
DEVELOPMENT**



**This response should be read in conjunction with the representations submitted by previously in February 2014**

**Matter F: The Duty to Cooperate in respect of strategic matters**

1. In the preparation of the Plan, have the Council engaged constructively, actively and on an ongoing basis with all those bodies with whom they are required to co-operate, in respect of:
  - a) Strategic employment matters
  - b) Strategic transport and other infrastructure

Whilst significant dialogue can be clearly demonstrated by Birmingham City Council (BCC) in the preparation of the BDP, Ashford Developments and Prologis do not consider that enough constructive engagement has been carried out by BCC (or NWBC) in their approach to address their employment shortfall or the potential joint benefits that could arise from supporting a cross boundary proposal, such as Birmingham International Gateway (BIG).

Many attempts have been made by Ashford Developments and Prologis to promote various land parcels east of Peddimore for employment. At **Appendix 1** we set out a series of representations that have been made to North Warwickshire Borough Council and the Coventry and Warwickshire LEP over the course of the last 2-3 years, in addition to the representations the subject of this Examination.

The Duty to Cooperate Statement<sup>1</sup> provided as part of the BDP evidence base notes that the land east of Peddimore is being promoted for employment, including land in North Warwickshire. We are also aware that our representations to the Plan have been shared with NWBC, but there is no evidence to demonstrate how BCC and NWBC have jointly considered the Birmingham International Gateway opportunity as a deliverable and viable option for meeting Birmingham's employment requirements. Separate, but related submissions have also been made to promote the land adjacent to J9M42 for employment (Translink). However, these were also dismissed by NWBC.

Representations have also been made to the Coventry and Warwickshire LEP promoting the site. However, the response provided by the LEP (attached) advised that the site was on the edge of their area and it would be more appropriate to approach the Greater Birmingham and Solihull LEP. This fails to address the significant opportunity that is being promoted and also fails to recognise that the GBSLEP is not the appropriate body to promote a scheme of this scale and significance outside of its area.

Ashford Development and Prologis are concerned that there has been no comprehensive review undertaken of the significant opportunity that the Birmingham International Gateway proposals could bring and that if no direction is provided at the BDP Examination on the need for an early review of the North Warwickshire Borough Local Plan to support the wider proposals, then this will represent a further example of how the cross boundary dialogue has failed to properly consider strategic employment and transport / infrastructure matters.

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<sup>1</sup> June 2014



Insofar as the Plan relies on other LPAs to deliver a proportion of its housing requirement, what mechanisms exist to ensure that other LPAs will comply with this approach?

Whilst this question is directed at residential land, we consider that this question should have also been applied to Birmingham's employment requirement. As a minimum, we consider that the BDP should be directed to include a clear reference to the need for:

1. Birmingham and North Warwickshire to carefully consider the strategic opportunity that Ashford Developments and Prologis are promoting (Birmingham International Gateway);
2. Clear guidance which prevents the Peddimore proposals (GA6) from fettering the ability to deliver the more comprehensive proposals being promoted by Ashford Developments and Prologis; and
3. An early review of the North Warwickshire Borough Plan to allow the delivery of the more comprehensive employment proposals being promoted by Ashford Developments and Prologis (**see Illustrative Masterplan at Appendix 2**).

04 October 2013  
CWLEP Letter 041013



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Dear Sirs

**COVENTRY & WARWICKSHIRE LOCAL ENTERPRISE PARTNERSHIP  
MAJOR SITE ASSESSMENT 2013 - SITE NOMINATION  
LAND NORTH OF KINGSBURY ROAD, CURDWORTH**

**Introduction**

We welcome the opportunity to participate within the Coventry and Warwickshire LEP (CWLEP) 'Open-call for Sites' process. Please find enclosed a completed 'Open-call for Sites' form, submitted on behalf of Ashford Developments and Prologis, with respect to land north of Kingsbury Road, Curdworth. This letter accompanies the submission form and explains the opportunity in greater detail.

**Site Proposal**

Ashford Developments controls circa 100 acres (40 hectares) of land on two sites, located within the North Warwickshire Borough Council (NWBC) administrative boundary to the north of Kingsbury Road, Curdworth, between the A38 and M6 Toll. Both sites are predominantly within agricultural use. A red line plan showing these two sites is included with this submission. The sites are numbered 1 and 2 on the enclosed plan.

Site 1 extends to circa 70 hectares to the north west of Curdworth, spanning the Birmingham and Fazeley canal and is bounded to the south by the A4097 Kingsbury Road. Further agricultural land is located to the north, east and west of the site. There is potential for an early release of at least part of this site. The area to the south of the Birmingham and Fazeley canal (circa 8 acres) has potential to be accessed directly from the Kingsbury Road. The area to the north of the canal (circa 70 acres) offers scope for the natural and logical expansion of strategic employment development activity in this area, with access from the local highway network, subject to appropriate technical assessments being undertaken.

Site 2 extends to circa 20 acres (8 hectares) bounded by the Birmingham to Fazeley Canal to the north, the M6 Toll and Junction 9 of the M42 to the east, the A4097 Kingsbury Road to the south and the existing Fairview Industrial Estate to the west. This site offers potential for early release, utilising existing access points from Kingsbury Road and Dunton Park. Initial schemes have been drawn up for this area and the marketing particulars have been enclosed with this submission, for reference.

Further details for the opportunity presented by these two sites are provided within the accompanying Open-call for Sites form. Ashford Developments and Prologis would welcome the chance for continued dialogue with CWLEP to bring these sites forward for economic development.

Offices and associates throughout the Americas, Europe, Asia Pacific, Africa and the Middle East.

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Registered office: 33 Margaret Street, London, W1G 0JD



## **Wider Strategic Economic Investment Opportunity**

### The CWLEP Need for a Regional Investment Site

We note that the CWLEP's focus is on inward investment and growing existing businesses to achieve the key objectives of driving economic growth, removing the barriers to growth and creating high value jobs.

To be able to achieve this focus, the CWLEP needs to be able to build on and maximise the existing economic and transport strengths of the area from both a local, and more significantly, strategic perspective, to deliver development that meets market demands and improves the competitive standing of the LEP area. Therefore the creation of a Regional Investment Site in an accessible location, with the potential for delivering significant strategic economic growth for the CWLEP area, is considered to be vitally important.

The land controlled by Ashford Developments provides the potential to achieve this, both in terms of economic development in the shorter term, but also in providing an opportunity for facilitating and contributing towards an even wider strategic economic investment opportunity in the longer term. This draws on its strategic location, the importance of proximity of the site to the Hams Hall Rail Freight Interchange, the links to Birmingham City Council's (BCC's) potential strategic employment land at Peddimore and the opportunity for significant job creation, as follows:

### Strategic Location

The strategic benefits of the location to west of the M6 Toll / M42 Junction 9, where Ashford Developments control circa 100 acres of land, are considered to be unrivalled within the CWLEP area.

In addition to the close proximity to the M6 Toll, M42 and A38 strategic highway network, the site is also in close proximity to the intermodal services provided by the Hams Hall strategic rail freight terminal. The location will be within a 10 minute drive from the expanded Birmingham International Airport and the proposed new International terminal, linked to HS2. Birmingham International railway station already provides direct services to London and central Birmingham.

The location also benefits from good connectivity to the local transport network, which is an important consideration for the future workforce travelling to the sites from within the CWLEP area.

The local road network in the immediate vicinity is primarily provided by the A4049 Kingsbury Road, to the south of the land, which links to the M42 / M6 Toll to the east and to the A38 to the west. Local railway services are available from Water Orton and Coleshill Parkway railway stations. There are also existing bus stops in Curdworth, on the A4097 Kingsbury Road, adjacent to the White Horse Public House, served by Arriva Bus services 116 (Birmingham City Centre to Tamworth) and 115 (Tamworth to Coleshill). These bus stops are within 400m from the southern edge of the Option Land. In addition, Curdworth is served by Johnsons of Henley Bus Service 757 (Sutton Coldfield to Birmingham International, via Water Orton and Coleshill Parkway railway station) and Flexibus Services 216 (Coleshill to Atherstone), 223 (Kingsbury to Elmdon Heath Parkway Hospital) and 231 (Coleshill to Tamworth).

### Hams Hall Rail Freight Interchange

The West Midlands Regional Logistics Study (2005) identifies that Hams Hall Rail Freight Interchange is the only existing RLS in the West Midlands.

The Rail Freight Terminal and Facilities at Hams Hall, comprise a 27 acre intermodal rail / road interchange facility. The facility currently handles over 100,000 sea freight containers per annum by rail through 4 working sidings of 450m each and 2 reception lines of 750m capable of accommodating the longest trains on the network. This facility is therefore highly significant asset for the CWLEP area, delivering economic, employment and transportation benefits. However we understand that the expansion of the Hams Hall is geographically constrained, but that it has the capacity for a significant increase in rail freight handling without necessitating improvements to the main line junction.

The Hams Hall Rail Freight interchange is therefore a significant, but under-utilised, business resource within the NWBC and CWLEP areas. The employment proposals being promoted through this submission, on land to the west of the M6 Toll / M42 Junction 9, are sufficiently proximate to the Hams Hall Rail Freight Terminal to be able to link into and benefit from this important strategic facility, utilising some of the spare capacity and providing a potential satellite expansion area for this facility.

#### Links To Land At Peddimore Being Promoted by Birmingham City Council

BCC is preparing its replacement Local Plan, the Birmingham Development Plan (2031), through which BCC is consulting upon strategic housing and employment growth in the Green Belt to the north east of its administrative area. The Options consultation document (2013) proposed four potential areas for Green Belt release (options A-D). Whilst BCC has not formally announced its preferred option areas for Green Belt release, we understand that land owned by BCC at Area D (Peddimore) will be proposed for employment development. A plan showing the location of these areas has been enclosed with this submission, for reference.

The employment proposals being promoted through this submission are also therefore well-related to the potential BCC strategic growth area and can enable CWLEP to work with the GBSLEP to help facilitate a mutually-beneficial strategic economic investment opportunity.

#### Job Creation

Taking account of the above factors and benefits, Ashford Developments and Prologis have joined forces to promote the 100 acres controlled by Ashford Developments to the west of the M6 Toll / M42 Junction 9 to seek to deliver significant economic development in this key location. Furthermore, Ashford Developments and Prologis have drawn up, and commenced early consultation on, potential development proposals which could enable significant strategic employment development to take place between the M6 Toll / M42 Junction 9 and the A38, which could incorporate employment development on Ashford Developments' Sites 1 and 2, BCC's land at Peddimore and the area in between within a major gateway proposal. This wider, comprehensive, gateway proposal could provide a strategic employment opportunity extending to circa 200 hectares in addition to the delivery of a new strategic link road between the A38 and M42 / M6 Toll. Sufficient land could be reserved within an early release of Site 2 to accommodate a highway access route to serve a wider proposal.

This wider potential opportunity, spanning two local authority boundaries and two LEP boundaries, is being referred to as Birmingham International Gateway (BIG). A context plan for this potential opportunity has also been included with this submission, highlighting the proximity of the proposal to existing strategic employment and transport infrastructure. BIG could provide the largest development opportunity in the West Midlands and could provide long-term opportunities for manufacturing and logistics and in doing so could create up to 15,000 new jobs over the next 20 years. Both Ashford Developments and Prologis also have a strong track record in working with future occupiers and businesses, Further Education colleges and local authorities to support access to employment opportunities.

Ashford Developments and Prologis are therefore seeking to raise the CWLEP's awareness of the potential for delivering significant short-term and longer-term economic development proposals in the north-western portion of the CWLEP area, in a highly accessible location. This would not only deliver early job creation benefits both locally and for the CWLEP area, but would also reflect the dynamic connectivity between the GBSLEP and CWLEP functional economic market areas and the ability for LEPs to cooperate to achieve job creation on a sub-regional basis.

If you require any further information about these potential opportunities please do not hesitate to contact me.

Yours faithfully

A handwritten signature in black ink that reads "Michael Davies". The signature is written in a cursive style with a large, stylized initial 'M'.

Michael Davies  
Director



**Coventry & Warwickshire**  
Local Enterprise Partnership

# Open-call for Sites

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15 – 50 acres (6 – 20 hectares)

10<sup>th</sup> September 2013

Submission by Savills on behalf of Ashford Developments and Prologis



The Coventry & Warwickshire LEP would like to support development sites of varying size, location and readiness across its geographic area over the coming years. In order to do that it urgently needs to gain a comprehensive understanding of suitable sites across Coventry and Warwickshire. Developers and Landowners are therefore requested in this open-call to submit details of commercial regional investment sites initially of between 15 – 50 acres (6 – 20 hectares)





## Coventry & Warwickshire Local Enterprise Partnership Major Site Assessment 2013 Site Nomination Form

The Coventry & Warwickshire LEP would like to support development sites of varying size, location and readiness across its geographic area over the coming years. In order to do that it urgently needs to gain a comprehensive understanding of suitable sites across Coventry and Warwickshire.

Developers and Landowners are therefore requested in this open-call to submit details of commercial regional investment sites initially of between 15 – 50 acres (6 – 20 hectares).

Please complete all sections of this form and return (with a location plan to identify the site edged in a red line) to:

**Coventry & Warwickshire LEP, the Old Clink, the Holloway, Warwick CV34 4SJ. Or by email to [contact@cwlep.com]**

Forms must be returned by **Friday 4<sup>th</sup> October 2013.**

### 1. Site address including postcode.

Land north of the A4097 Kingsbury Road and west of the M6 Toll, Curdworth, B76.

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### OWNERSHIP

2. Are you the owner of the site? Yes  No

Owner		Agent (where applicable)	
Name:	<b>Ashford Developments</b>	Name:	<b>Michael Davies</b>
Address		Address:	<b>Savills</b>
			<b>Innovation Court,</b>
			<b>121 Edmund Street</b>
			<b>Birmingham, B3 2HJ</b>
Tel:		Tel:	<b>0121 634 8436</b>
Fax:		Fax:	<b>0121 633 3666</b>
Email		Email:	<a href="mailto:mpdavies@savills.com">mpdavies@savills.com</a>

### 3. If you have ownership of the land, are you:

Sole Owner  Part owner

### 4. Please give name and address of any other current owner(s), if applicable.

Ashford Developments has an option over the land highlighted in red on the enclosed plan. As detailed on the covering letter supporting this submission, the land also forms part of a potential wider proposal for a strategic employment development stretching between the M6 Toll and A38, which also incorporates land owned by Birmingham City Council.

#### Data Protection Act 1998

The Data Controller is Coventry City Council. The data is being collected to assess the work of the Strategic Land Availability Assessment and to provide improvements to the service. All the data will be aggregated. No personal data will be published.



**SITE CHARACTERISTICS**

**5. Description of current/most recent use of the land:**

The land is currently predominantly within agricultural use. The total extent of the land controlled by Ashford Developments is circa 100 acres. A red line plan is enclosed with this submission to demonstrate the location and extent of this land. The land is currently predominantly within agricultural use and comprises two separate parcels. The western area (Site 1) extends to circa 70 hectares to the north west of Curdworth, which spans the Birmingham and Fazeley Canal, and is bounded to the south by the A4097 Kingsbury Road. The eastern area (Site 2) extends to circa 20 acres (8 hectares) bounded by the Birmingham to Fazeley Canal to the north, the M6 Toll to the east, the A4097 Kingsbury Road to the south and the existing Fairview Industrial Estate to the west. Further agricultural land is located to the north, east and west.

The covering letter for this submission provides greater context for a wider gateway proposal being promoted by Ashford Developments and Prologis, which proposes a high quality strategic employment development between the M42/M6 Toll and the A38, linking the land controlled by Ashford Developments to agricultural land owned by Birmingham City Council at Peddimore, in conjunction with the creation of a new link road.

In addition to good strategic highway connections, the land also benefits from close proximity to the Hams Hall Strategy Rail Freight Interchange and provides an opportunity to increase the utilization of this significant business resource, which we understand is not currently operating to its full potential.

**6. Site conditions**

Vacant/Cleared site	<input type="checkbox"/>	Demolition required or pending	<input type="checkbox"/>
Occupied land/buildings (Agricultural use)	<input checked="" type="checkbox"/>	Demolition or remediation underway	<input type="checkbox"/>

**7. Public transport (bus stop with 30min frequency and railway station)**

Within 400m       400m – 1km       More than 1km

**8. Indicate neighbouring uses within 400m of the site (tick all that apply).**

Retail       Employment       Residential       Leisure       Mixed

**9. What sort of development has already been granted or you would envisage being suitable on the site (tick all that apply)?**

Nonresidential (Use Classes Order)

B1     B2     B8     A1     A2     A3     A4     A5   
 C1     C2     C3     D1     D2

**Data Protection Act 1998**

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**OTHER USES**

9. If the site is not suitable for any of the above uses, please indicate any potential use that you think may be suitable.

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**DELIVERABILITY**

11. When do you think the site could deliver development?

Within the next 0 - 2 years?

Within 2-5 years (i.e. between 2016 and 2019)

Within 5-10 years (i.e. between 2019 and 2024)

12. Once commenced, how long do you think it would take to develop the site?

Within 12 months       1 – 2 years       Longer

14. If the site requires phasing of development, please explain/confirm the likely timing of the phases and number of units to be delivered in each phase.

There is potential for early release of the land between Kingsbury Road and the Birmingham and Fazeley Canal, which is anticipated could come forward within three years. The marketing particulars for the land immediately to the west of the M6 Toll identifies potential for 100,000 – 200,000 sq ft industrial / warehouse units in two plots. Overall phasing for the remaining strategic employment development opportunity is still to be confirmed.

15. If you consider that the site has potential for development contrary to any existing permission (e.g. whether additional numbers or types of could be accommodated), or whether the site may have potential for an alternative commercial use please indicate.

The land does not currently benefit from planning permission for employment development.

**Data Protection Act 1998**

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## **DEVELOPMENT CONSTRAINTS**

**16. To the best of your knowledge, are there any constraints that may be preventing development (including speculative Development) at the site? Please provide brief details:**

### **Access difficulties**

The wider highway network provided by Kingsbury Road, A38, M6 Toll, M42 and A446 Lichfield Road all provide good highway access. However there may be an initial need to provide improvements to some of the local roads / junctions from which the site can currently be accessed (such as Wishaw Lane and Dunton Park) to accommodate suitable arrangements for commercial vehicles. There is considered to be potential for forming suitable access(es) into the site from the local road network. This will however need to be tested by a suitably qualified transport consultant in due course.

Ultimately, as set out in the covering letter, the wider gateway proposals being promoted by Ashford Developments and Prologis provides the potential opportunity to create a new link road, which will provide a new access to the proposed high quality strategic employment development and also provide a bypass to Curdworth, reducing traffic flows along Kingsbury Road between the M42/M6 and A38.

### **Infrastructure requirements**

Strategic employment development in this location will need to be connected to the general mains services and utilities, which we understand are available at this location. However the process to connect in to, and the capacity of, this infrastructure will need to be investigated during the pre-application process. This location already benefits from good access to strategic highway infrastructure. The wider proposals for a new strategic employment gateway will provide the potential for delivering a new link road between the A38 and M6/M42.

### **Topography or Ground Conditions**

There are no known topographical / ground condition constraints that might prevent large-scale strategic employment development.

### **Contamination/Pollution**

There are no known contamination / pollution constraints. A Phase 1 Land Quality Assessment will need to be undertaken in due course. We note that Birmingham in its entirety has been declared an AQMA; however exceedences of the annual mean NO<sub>2</sub> objective are not predicted everywhere. Birmingham City Council's modelled annual mean NO<sub>2</sub> concentrations map shows that the Site to be located outside of an area likely to exceed the annual mean NO<sub>2</sub> objective. However this does not extend as far as the M6 Toll and therefore further air quality work will need to be undertaken as an update.

### **Development funding (including level of funding potentially required)**

Development funding is still to be confirmed. Ultimately the scale and amount of development coming forward, including the potential need to deliver a major link road, will determine the funding requirements for the project or for any particular phase.

#### **Data Protection Act 1998**

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## **Legal / planning Issues**

The land is currently within the Green Belt and is not allocated, or proposed for allocation, within existing or emerging Development Plan Documents . The wider gateway proposal also spans two local authority and two LEP boundaries.

## **Other**

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### **17. Of the constraints identified, please explain how you think the LEP could assist with overcoming these**

As set out in the CWLEP's Strategy for Growth "to achieve the key objectives of driving economic growth, removing the barriers to growth and creating high value jobs, CWLEP's focus is on inward investment and growing existing businesses". The CWLEP therefore understands the importance of enabling and delivering economic development.

Accordingly, the support of the LEP for both short-term and longer term employment development in this location, and the recognition of the economic benefits that such development could bring to the LEP area could assist in demonstrating the very special circumstances to allow development to occur within the Green Belt. In recognition of the benefit that employment development in this location could also deliver for the Greater Birmingham and Solihull LEP area, CWLEP could also play a pivotal role in facilitating discussion between the various parties involved.

## **CONTACT**

**18. By identifying the site, you are inviting representatives of the LEP to make contact with the land owner to explore the issues / constraints outlined as well as carrying out a site inspection. In view of this, please advise as to the best person to contact and if there are any problems which would restrict access to the site for this purpose?**

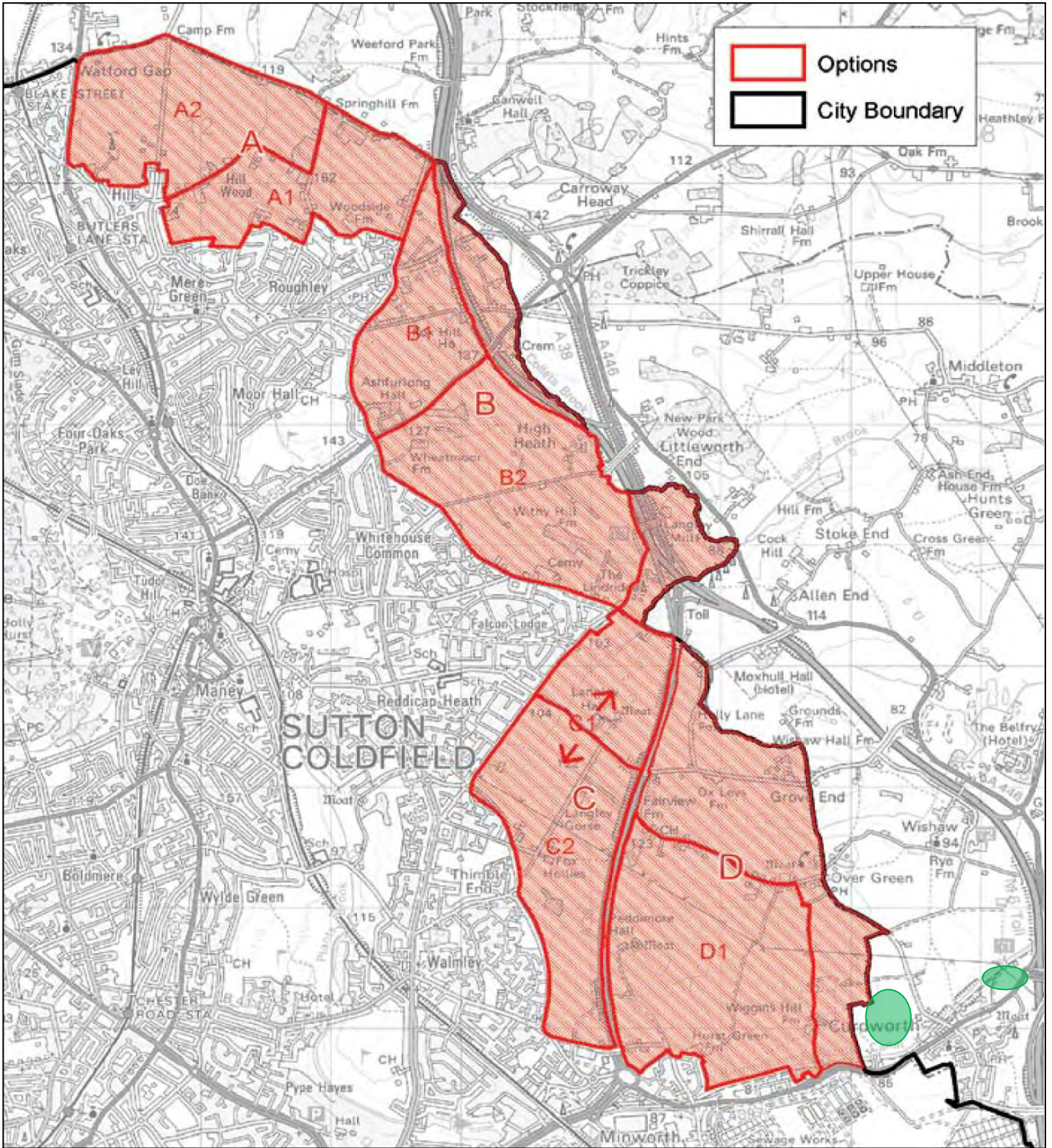
In the first instance please contact Michael Davies, the agent, using the details supplied in Section 2 of this form.

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Thank you for completing this form.

#### **Data Protection Act 1998**

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## Birmingham Development Plan

### January 2013 Consultation Options for Green Belt Release

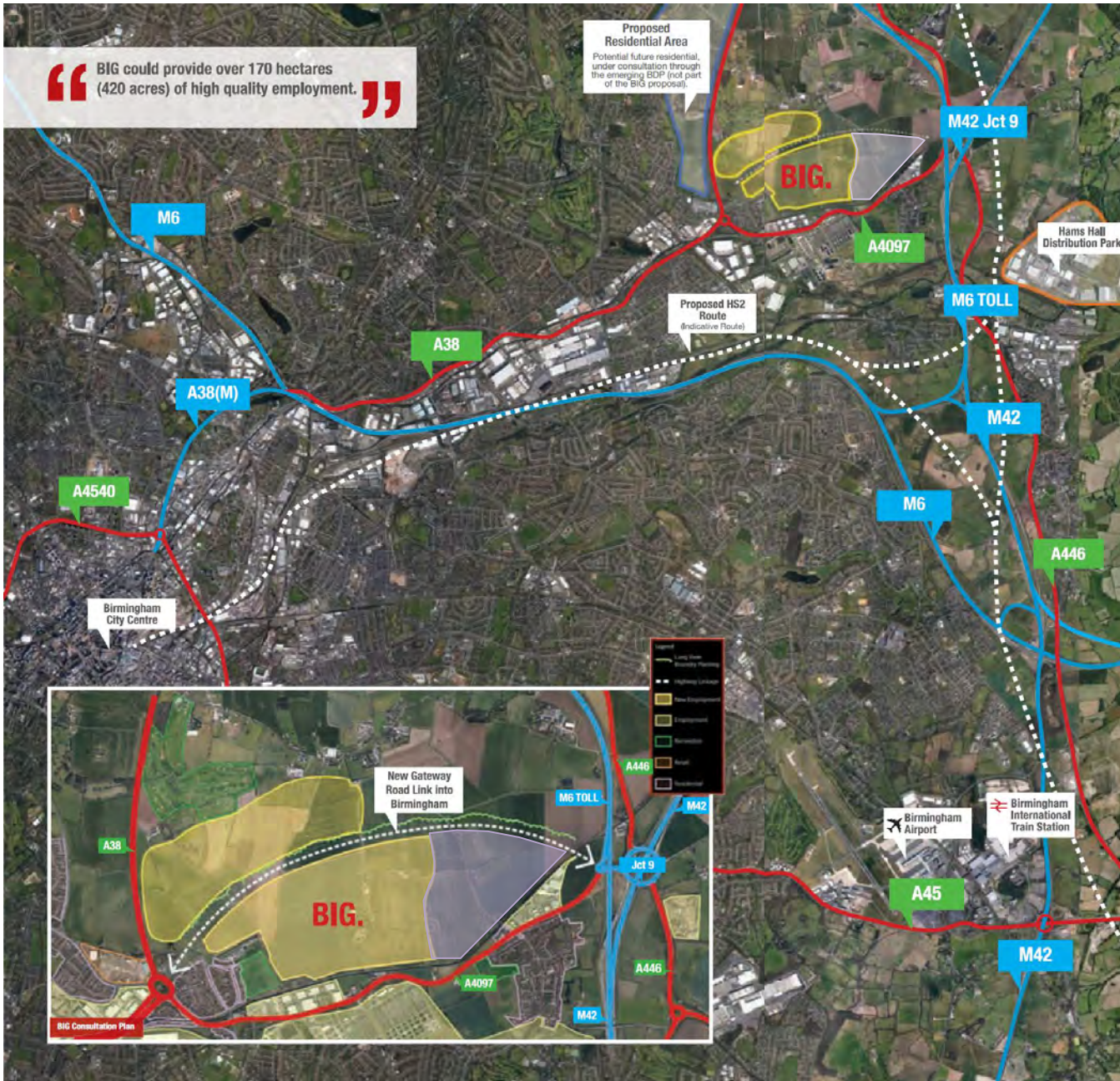
Plan produced to support representation to CWLEP Open Call for Sites (October 2013)



Location of land controlled by Ashford Developments



“ BIG could provide over 170 hectares (420 acres) of high quality employment. ”



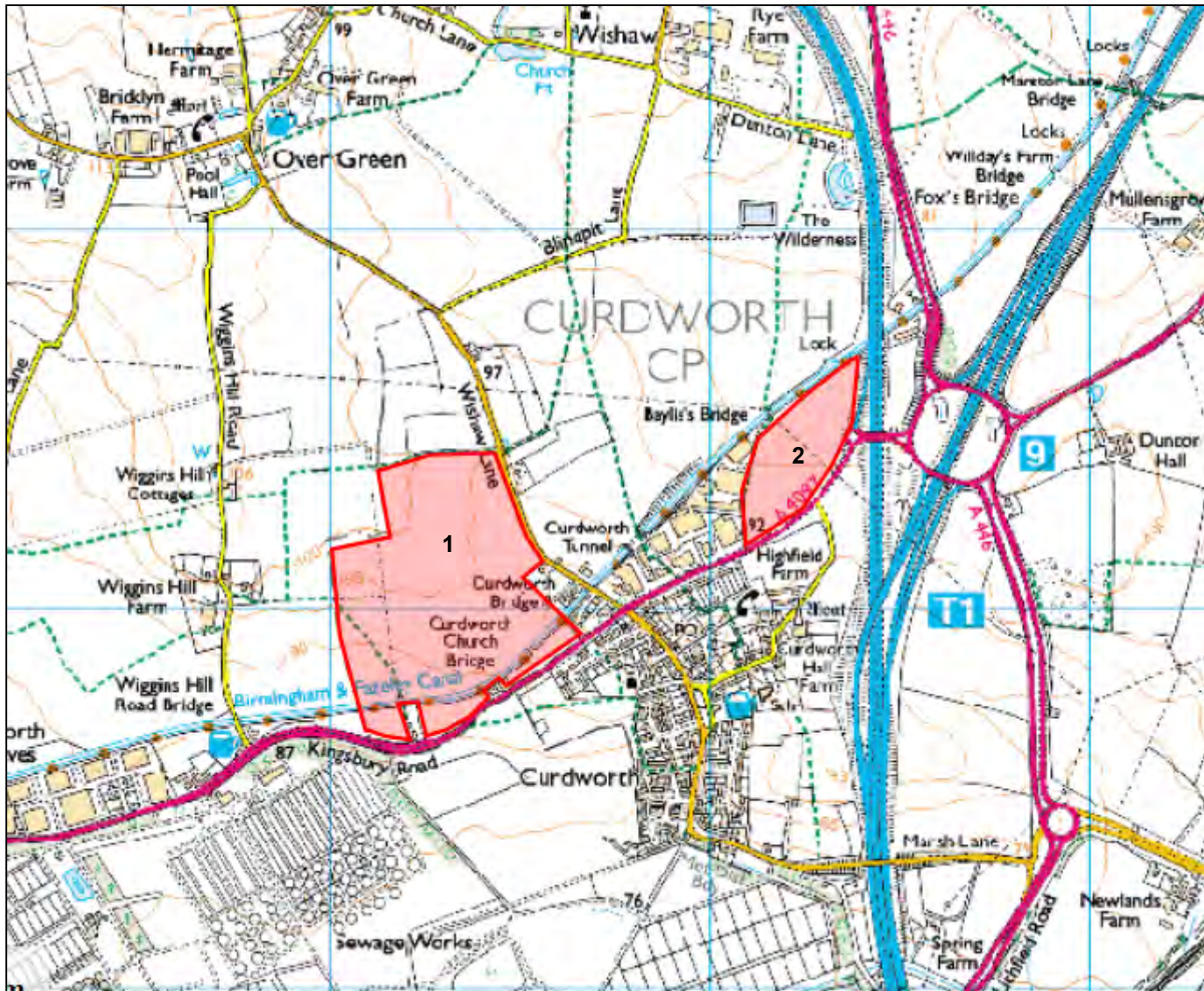
# Birmingham International Gateway (BIG)

## Strategic Employment Proposal Context Plan

- Proposed BIG area within Birmingham City Council administrative area (GBSLEP) – 170ha
- Potential BIG area within North Warwickshire Borough Council administrative area (CWLEP)


Plan produced to support representation to CWLEP Open Call for Sites (October 2013)





## Location Plan

### Ashford Developments' Land Location Plan

 Land within the CWLEP area under the control of Ashford Developments

Plan produced to support representation to CWLEP Open Call for Sites (October 2013)





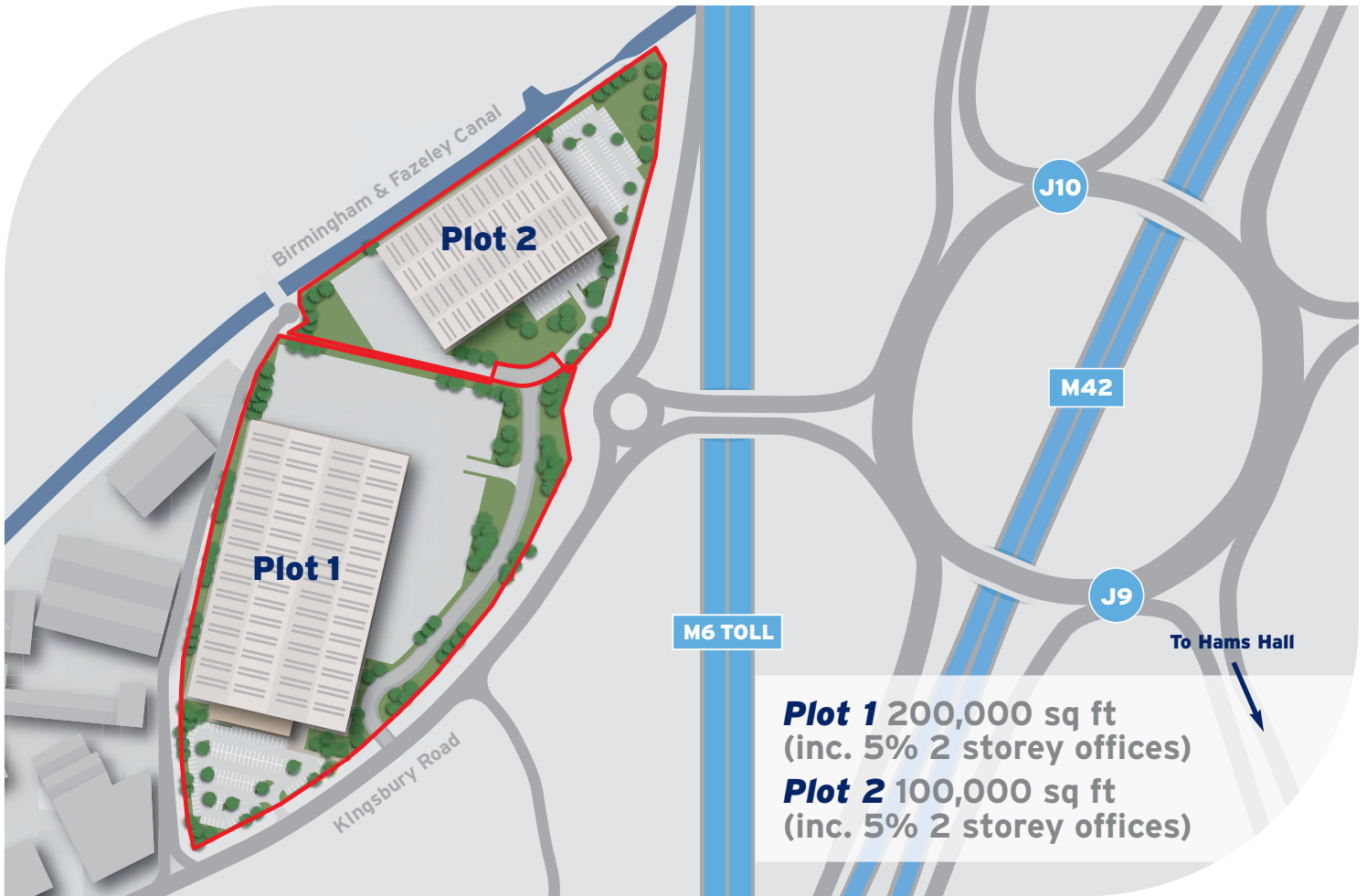


***A New Exciting Industrial/Warehouse Development***

***Curdworth Birmingham, Junction 9, M42***

***Plot 1*** 200,000 sq ft (inc. 5% 2 storey offices)

***Plot 2*** 100,000 sq ft (inc. 5% 2 storey offices)



The site extends to circa 20 acres with prominent roadside frontage to the M6 Toll / M42 motorways and provides a prime opportunity for an occupier to have its own bespoke distribution or industrial unit from circa 100,000 sq ft up to 200,000 sq ft.



### Communications

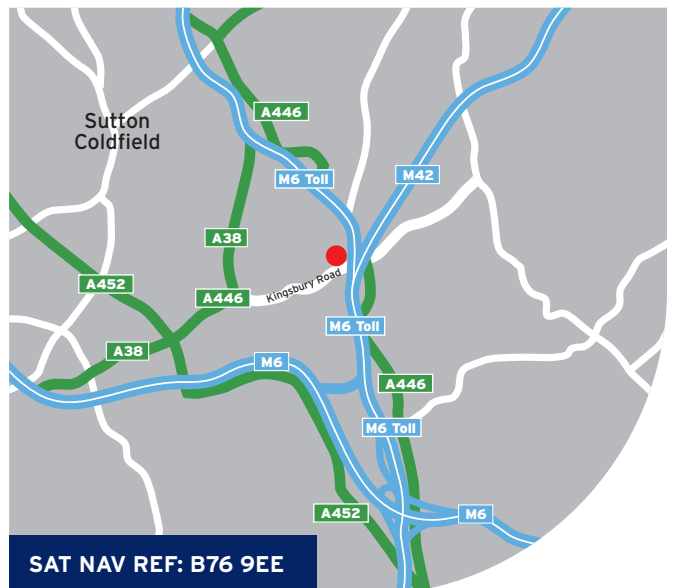
A446 dual carriageway	0.1 miles
M6 Toll Road	0.1 miles
M42 J 9	0.1 miles
M40	17.0 miles
M5	27.0 miles
M1	30.0 miles
Birmingham International Railway Station	8.0 miles
Birmingham International Airport	10.0 miles

### Further information

For further details please contact:



Richard Ashford  
 Ashford Developments  
 info@ashford-dev.co.uk  
 Tel: 020 7193 6900  
 Mob: 0780 166 836



**Misrepresentation Act:** The joint agents give notice that these particulars are set out as a general outline only for the guidance of intending Purchasers or Lessees and do not constitute any part of an offer or contract. Details are given without any responsibility and any intending Purchasers, Lessees or Third Party should not rely on them as statements or representations of fact, but must satisfy themselves by inspection or otherwise as to the correctness of each of them. No person in the employment of the joint agents have any authority to make any representation or warranty whatsoever in relation to this property. July 2013.

# Coventry & Warwickshire

## Assessment of sub-regional employment land requirements

Final Report

April 2014

ATKINS

Plan Design Enable



Coventry & Warwickshire  
Local Enterprise Partnership

# Notice

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This document has 54 pages including the front and back covers.

## Document history

Job number: 5127622			Document ref: DR1			
Revision	Purpose description	Originated	Checked	Reviewed	Authorised	Date
Rev 1.0	Draft report	JG	IC	ID	RC	28/2/2014
Rev 1.1	Final report	JG	IC	ID	RC	18/3/2014
Rev 1.2	Final report	JG	IC	ID	RC	9/4/2014

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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 Sub-Regional 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 sub-regional significance; and
  - If a need for such site(s) is identified, assess the suitability of potential sites and provide appropriate recommendations.
- 1.4. The assessment of the supply of employment land was not part of the scope of this study. Therefore, references to employment land availability are based on the findings of the individual local authorities' previous employment land research and information provided by the local authorities over the course of this study.

## Coverage

- 1.5. 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.
  - Class B8 – Storage or Distribution: use for storage or as a distribution centre.

## Structure

- 1.6. 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 considers the need within the CWLEP area for an employment site(s) of sub-regional significance; and
- Chapter 6 presents the study conclusions and recommendations.

## 2. Review of relevant documents

### 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 give 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 assessment 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. The Plan states that job creation and international competitiveness 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

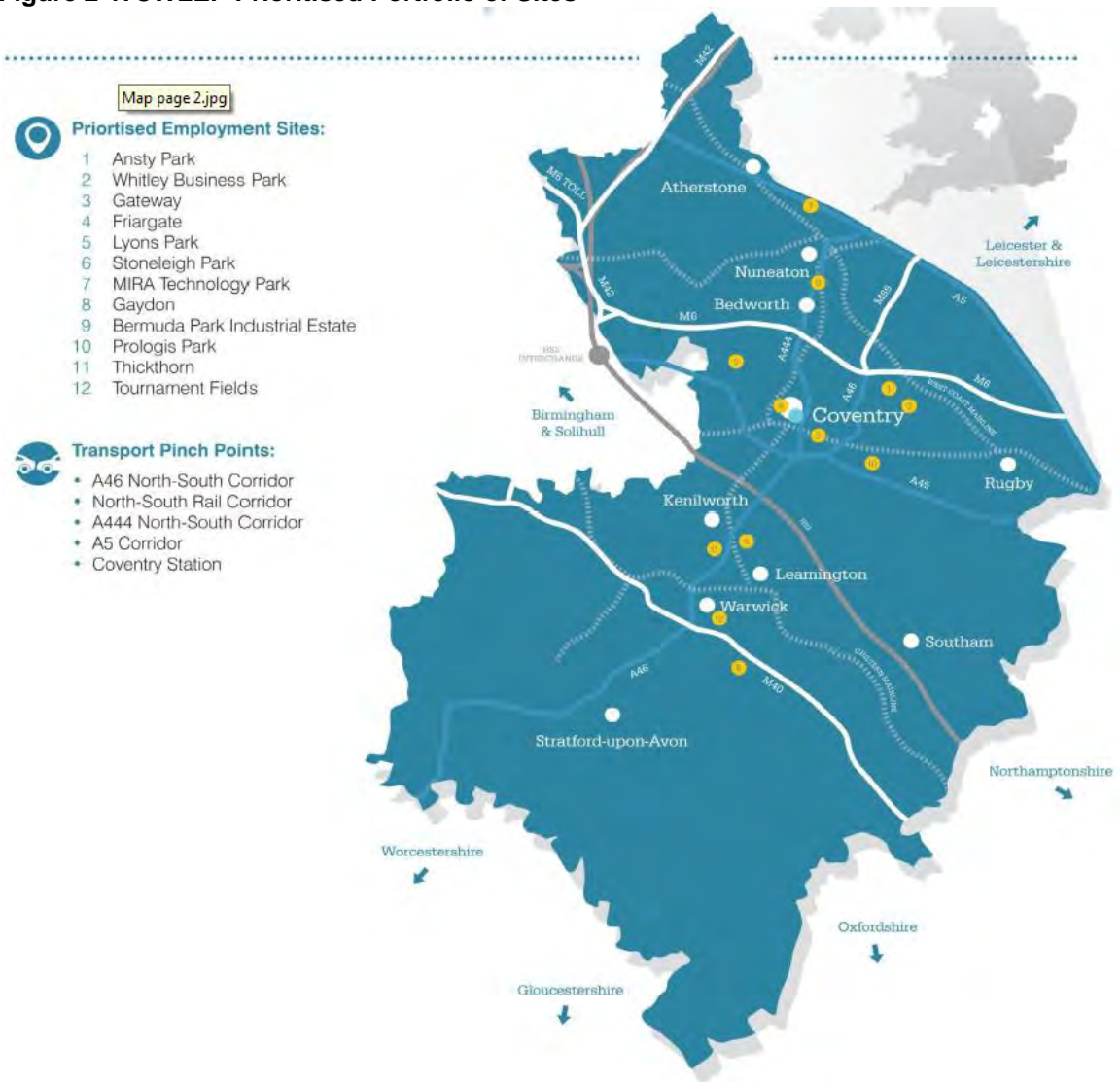
- 2.23. The City Deal confirms the important role of the advanced manufacturing and engineering (AME) sectors, particularly the automotive sector in which the sub-region has more than five times the average concentration of employment. The advanced manufacturing and engineering sectors are also seen 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 Draft Strategic Economic Plan

- 2.26. 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 central location, 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 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 8,835 people and annual AME 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.
- 2.28. The SEP confirms CWLEP's commitment to the development of 76,000 new homes by 2031, in alignment with the findings of the Joint Strategic Housing Market Assessment undertaken in 2013. It 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.
- 2.29. 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

2.30. The provision of quality infrastructure including employment sites, digital connectivity and transport connectivity are seen as prerequisites to continued economic success and the creation of new employment opportunities for local residents. The availability of employment sites in particular is described as fundamental to attracting new investors, retaining local businesses and reshoring of manufacturing. 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 Draft Strategic Economic Plan

2.31. Building on the success of Ansty Park as a major development site and its anticipated next stage of development, the SEP identifies Coventry and Warwickshire Gateway as the key priority employment site. The SEP states that without the development of the Gateway site, the CWLEP will be unable to meet its expected employment growth.

### Policy implications relevant to this study

2.32. 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).

- 2.33. 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.
- 2.34. 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

- 2.35. 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.
- 2.36. 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.
- 2.37. 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

- 2.38. 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.
- 2.39. 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

- 2.40. 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.
- 2.41. 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"<sup>1</sup>. 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.
- 2.42. By disaggregating the local and regional elements of future demand, the study recommends that North Warwickshire Council should make provision for the delivery of 70 ha of employment land over the period from 2006 to 2028 in order to support local employment growth. This is broken down as follows:
- Office/R&D: 15 ha
  - Industrial: 15 ha
  - Warehouse/Distribution: 40 ha
- 2.43. 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.
- 2.44. 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 24 hectares of additional employment land within the North Warwickshire Local Plan in order to meet assessed local needs.
- 2.45. 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 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

- 2.46. 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.
- 2.47. 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

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<sup>1</sup> Defined as the triangle formed by the M42, M6 and M1 Motorways.

used. The ELR based its recommendations on the RSS scenario which assumed 11,000 new homes being delivered within Nuneaton and Bedworth.

- 2.48. 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.
- 2.49. The study considered potential sites for locating a Regional Investment Site<sup>2</sup> 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.
- 2.50. 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

- 2.51. 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.
- 2.52. 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

- 2.53. 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.
- 2.54. 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

- 2.55. 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).
- 2.56. 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;

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

- 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

- 2.57. 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.
- 2.58. 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 Intended Proposed Submission Core Strategy

- 2.59. 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:
- 10 ha 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

- 2.60. 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.
- 2.61. 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.
- 2.62. 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.
- 2.63. 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

- 2.64. 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 overall assessed need for the sub-region was estimated to be 3,800 dwellings per year. The annual housing need for the individual local authorities was estimated as follows:
- Coventry: 1,180 dwellings
  - North Warwickshire: 175 dwellings
  - Nuneaton and Bedworth: 495 dwellings
  - Rugby: 660 dwellings
  - Stratford-on-Avon: 570 dwellings
  - Warwick: 720 dwellings
- 2.65. 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.
- 2.66. 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.
- 2.67. 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.

## Summary of future employment land requirements

- 2.68. 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.
  - 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.
- 2.70. **Table 2-2** 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 2-2: Summary table**

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	70 ha	24 ha	2006 - 2028
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
<b>Total<sup>3</sup></b>	<b>504 ha</b>	<b>206 ha</b>	

- 2.71. Adding up 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 504 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 206 ha.
- 2.72. 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.

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<sup>3</sup> 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 sub-regional employment land issues including future trends and whether there is a need for additional employment site(s) of sub-regional significance.
- 3.2. The consultation event was attended by stakeholders representing local authorities, 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 big 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 the sub-region has significant potential for further economic growth, building 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 important to 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 sub-regional 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<sup>4</sup>**

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%
<b>All sectors</b>	<b>77,600</b>	<b>21%</b>

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 8.3).

**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%
<b>Total B class</b>	<b>191,700</b>	<b>207,500</b>	<b>212,100</b>	<b>219,100</b>	<b>226,100</b>	<b>34,300</b>	<b>18%</b>

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**

- 4.8. Table 4-4 and Table 4-5 below.

<sup>4</sup> 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%
<b>Total B class</b>	<b>5,750,900</b>	<b>6,267,100</b>	<b>6,380,000</b>	<b>6,562,400</b>	<b>6,747,300</b>	<b>996,400</b>	<b>17%</b>

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%
<b>Total B class</b>	<b>1,218</b>	<b>1,325</b>	<b>1,346</b>	<b>1,383</b>	<b>1,420</b>	<b>201</b>	<b>17%</b>

Source: Cambridge Econometrics, Atkins

- 4.9. 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.
- 4.10. 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.
- 4.11. 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%

Use class	FTE change 2011-2031		Floorspace change 2011-2031		Employment land change 2011-2031	
B8	1,200	11%	86,100	11%	17	11%
<b>Total B class</b>	<b>6,700</b>	<b>11%</b>	<b>156,600</b>	<b>9%</b>	<b>32</b>	<b>9%</b>

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%
<b>Total B class</b>	<b>8,000</b>	<b>37%</b>	<b>347,200</b>	<b>40%</b>	<b>70</b>	<b>38%</b>

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%
<b>Total B class</b>	<b>2,600</b>	<b>15%</b>	<b>81,700</b>	<b>13%</b>	<b>17</b>	<b>13%</b>

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%
<b>Total B class</b>	<b>4,000</b>	<b>19%</b>	<b>162,500</b>	<b>23%</b>	<b>34</b>	<b>23%</b>

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%
<b>Total B class</b>	<b>4,900</b>	<b>17%</b>	<b>91,900</b>	<b>12%</b>	<b>19</b>	<b>12%</b>

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%
<b>Total B class</b>	<b>8,100</b>	<b>20%</b>	<b>156,500</b>	<b>14%</b>	<b>31</b>	<b>14%</b>

Source: Cambridge Econometrics, Atkins

## Scenario 2: Higher growth scenario

- 4.12. The baseline forecasts are complemented by a higher-growth scenario developed by Atkins. This is based on CWLEP's prediction<sup>5</sup> that the City Deal will deliver over 8,800 new jobs in advanced manufacturing and engineering by 2025. This projected growth in advanced manufacturing and engineering is also aligned with CWLEP's Draft Strategic Economic Plan 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).
- 4.13. CWLEP's target of 8,800 new AME jobs by 2025 is based on baseline data, the economic outcomes from the delivery of the SEP (including the four investment programmes at the heart of the SEP) and future projections by 2025 as modelled by independent economic consultants Regeneris Consulting<sup>6</sup>.
- 4.14. 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 (this adds up to 8,800 new jobs by 2025 and 12,571 new jobs by 2031). 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%
- 4.15. 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 no figures are provided for the individual local planning authorities.
- 4.16. 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 (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%

<sup>5</sup> Coventry and Warwickshire City Deal, page 1 and CWLEP Draft Strategic Economic Plan, page 17

<sup>6</sup> CWLEP Draft Strategic Economic Plan, page 16

Use class	2011	2016	2021	2026	2031	Change 2011-2031	% change 2011-2031
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%
<b>Total B class</b>	<b>191,700</b>	<b>210,700</b>	<b>218,400</b>	<b>228,500</b>	<b>238,600</b>	<b>46,900</b>	<b>24%</b>

Source: Cambridge Econometrics, Atkins

4.17. 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.

4.18. Under Scenario 2, the LEP area's employment floorspace requirements will increase by some 1,532,000 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%
<b>Total B class</b>	<b>5,750,900</b>	<b>6,400,900</b>	<b>6,647,800</b>	<b>6,964,000</b>	<b>7,282,900</b>	<b>1,532,000</b>	<b>27%</b>

Source: Cambridge Econometrics, Atkins

4.19. 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 future need is projected to come from B8 sectors but a balanced mix of demand for B1a/b, B1c and B2 land 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%
<b>Total B class</b>	<b>1,218</b>	<b>1,356</b>	<b>1,408</b>	<b>1,476</b>	<b>1,544</b>	<b>326</b>	<b>27%</b>

Source: Cambridge Econometrics, Atkins

### Scenario 3: SHMA-linked scenario

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

4.20. 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
<b>LEP area</b>	<b>48,848</b>	<b>76,000</b>

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

- 4.21. 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.
- 4.22. 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.
- 4.23. 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

- 4.24. 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 purely 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

Use class	Floorspace change 2011-2031 (sqm)	Employment land change 2011-2031 (ha)
B2	60,055	15
B8	298,200	60
<b>Total B class</b>	<b>543,243</b>	<b>115</b>

Source: Atkins

- 4.25. The above projections should be considered with caution however for a number of reasons. First, the labour supply growth levels are significantly lower than those suggested by the Cambridge Econometrics forecasts. Second, the projected labour supply growth figures do not always correspond to the assessed levels of housing need. As an example, even allowing for a gradually ageing population and higher than average unemployment and economic inactivity levels it is likely that the provision of 11,400 new homes in Stratford-on-Avon (in accordance with the SHMA's findings) would generate more than 1,301 new residents in employment. Similarly for North Warwickshire and, to a lesser extent, other local authorities.
- 4.26. Therefore, the above employment land requirements are likely to significantly 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, 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.
- 4.27. 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

- 4.28. 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 Warwickshire	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 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

- 4.29. The caveat that must accompany any assessment of future employment land requirements based on a linear projection of past completions is that past trends may not necessarily be reflected in future years. This is particularly the case given that major, one-off employment

developments can have a distorting effect on the average number of hectares completed per year. A good example of the above is North Warwickshire. Based on the projection of past completions, North Warwickshire is forecast to require 270 ha of employment land over the period 2011-2031 which does not appear to be a realistic assessment of the area's future employment land requirements.

- 4.30. Furthermore, this scenario is based on gross completions and does not take into account the loss of employment land that is likely to have taken place alongside these completions. Still, the projections of this scenario provide a useful assessment of potential future requirements to be considered alongside the results of the employment and housing growth scenarios.

## Supply and demand balance

### Future demand

- 4.31. The four scenarios tested above estimate the sub-region's additional employment land requirements over the period 2011-2031 to 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 the sub-region's employment land requirements to 2031 are estimated to be approximately 326 ha.
- 4.32. The results of both Scenarios 3 and 4 should be treated with caution for the reasons outlined above. On balance, it is recommended that the projections of the higher growth scenario that applies the City Deal's target of 8,800 new advanced manufacturing and engineering jobs by 2025 on the base Cambridge Econometrics forecasts are used as the basis for planning the sub-region's additional employment land requirements over the period 2011-2031. This allows an element of flexibility over the projections of the base employment growth scenario and reflects the LEP's strategic growth objectives as well as property market signals that show strong demand for advanced manufacturing, engineering and logistics sites.

### Available supply

- 4.33. A review of the existing supply of employment sites (extant permissions and allocations) suggests the sub-region has some 358 ha of available land that could be used towards meeting future requirements (Table 4-19). However, it is noted that not all sites with planning permission or allocation will necessarily be developed for employment use over the period to 2031. Furthermore, approximately 48 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 310 ha.

**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	31 ha	2 ha
Nuneaton and Bedworth	20 ha	N/A
Rugby	116 ha	2 ha

Stratford-on-Avon	39.5 ha <sup>7</sup>	N/A
Warwick	66 ha <sup>8</sup>	-
<b>Total</b>	<b>358 ha</b>	<b>48 ha</b>

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

4.34. Based on the above, the sub-region is projected to have a theoretical employment land shortfall of approximately 16 ha between 2011 and 2031. However, it should be stressed that this is a theoretical assessment which assumes that:

- The identified supply of employment land is fit for purpose and able to meet the requirements of the sub-region's key growth sectors;
- There are no significant constraints to the development of the identified portfolio of sites and there is a realistic prospect of all identified sites being developed over the period to 2031; and
- There will not be substantial loss of existing employment sites to other uses over the assessment period (beyond the 48 ha from Table 4-19 that have been taken into account).

4.35. If any of the assumptions listed above are not met, it is likely that the sub-region's additional employment land requirements (on top of the currently identified employment land availability) will exceed 16 ha over the period 2011-2031.

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<sup>7</sup> Stratford-on-Avon District Council is also considering the provision of 100 hectares specifically for the expansion of Jaguar Land Rover's operations at Gaydon.

<sup>8</sup> 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.

## 5. Assessment of potential sub-regional employment sites

### Definition of a sub-regional employment site

- 5.1. For the purposes of this study, an employment site of sub-regional significance is defined as a site that:
- is at least 20 ha in size or is likely to accommodate at least 80,000 sq metres of floorspace;
  - has good levels of accessibility and is located within, or close to, the areas of greatest need;
  - is capable of meeting the needs of the sub-region's key growth sectors including advanced manufacturing and engineering, research and development and logistics; and
  - is attractive to local, national and potentially international investors.
- 5.2. From a policy perspective, sub-regional employment sites have had a changing relationship with planning policy since the days of Regional Spatial Strategies. Past Local Development Plans have identified the need for Sub-Regional Employment Site Planning and Monitoring. This was linked to Regional Spatial Strategies which sought to establish regionally specific policies, which were expected to add to national policies as well as addressing regional or sub-regional issues that may cross county, unitary authority or district boundaries.
- 5.3. The Plan for Growth and the National Planning Policy Framework made changes to planning policy which further supported development which can drive economic growth. The government has introduced a "presumption in favour of sustainable development" and is advocating the "opening up of more land for development". The government has set "clear expectations that local planning authorities and other bodies involved in granting development consents should prioritise growth and jobs".
- 5.4. As a consequence, there has been a re-emergence of the importance of sub-regional employment sites. This is linked to new economic and planning structures like Local Enterprise Partnerships which encourage sub-regional collaboration.

### Defining areas of greatest need

- 5.5. 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.
- 5.6. 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 draft 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
<b>Change 2003-2012</b>	<b>22,400</b>	<b>500</b>	<b>5,300</b>	<b>11,700</b>	<b>7,600</b>	<b>7,900</b>	<b>55,400</b>

Source: Office for National Statistics

- 5.7. In terms of unemployment, the latest available data for the period October 2012 to September 2013 show that North Warwickshire, Nuneaton and Bedworth and Coventry have unemployment rates higher than the national average of 7.9%. Examining the unemployment rate trends over the period 2004-2013, Coventry had the highest average unemployment rate in the sub-region (7.9%), followed by Nuneaton and Bedworth (7.3%) and North Warwickshire (7.1%).

**Table 5-2 Unemployment rate - aged 16-64**

Period	Coventry	North Warwickshire	Nuneaton and Bedworth	Rugby	Stratford-on-Avon	Warwick
Oct 2012-Sep 2013 (latest available)	8.5%	10.3%	8.6%	4.9%	3.4%	6.4%
Average Oct 2004-Sep 2013	7.9%	7.1%	7.3%	5.5%	4.0%	4.7%

Source: Annual Population Survey, Office for National Statistics

- 5.8. 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 53<sup>rd</sup> 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)	53 <sup>rd</sup>	172 <sup>nd</sup>	115 <sup>th</sup>	225 <sup>th</sup>	271 <sup>st</sup>	260 <sup>th</sup>

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

- 5.9. 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.

- 5.10. Based on the above and in line with CWLEP's draft 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.

### **Consideration of the quantitative case for new sub-regional employment sites**

- 5.11. As discussed in the supply / balance section of Chapter 4, the results of the scenario testing exercise suggest the sub-region is likely to need at least 16 ha of additional land on top of the currently available employment land (sites with permission or approved/draft allocations). This suggests there is scope for the allocation of additional employment sites (beyond the currently identified available employment land) in order to meet the projected need of the higher employment growth scenario, However, this is a theoretical assessment which assumes that:
- The identified supply of employment land is fit for purpose and able to meet the requirements of the sub-region's key growth sectors;
  - There are no significant constraints to the development of the identified portfolio of sites and there is a realistic prospect of all identified sites being developed over the period to 2031; and
  - There will not be substantial loss of existing employment sites to other uses over the assessment period (beyond the 48 ha from Table 4-19 that have been taken into account).
- 5.12. If any of the assumptions listed above are not met, it is likely that the sub-region will require more than 16 ha of additional employment land over the period to 2031, in addition to the identified available sites. This would further strengthen the quantitative case for additional large sites of sub-regional significance.

5.13. Table 5-4 below summarises the current land availability across the sub-region, focusing on sites of at least 2 ha in size. Most of the available supply of employment land consists of smaller sites while there are currently five sites over 20 ha that could potentially fulfil the role of a sub-regional site:

- Ansty Park is a major employment site located adjacent to Junction 2 of the M6. Approximately 7.5 ha have already been developed while the remaining 34 ha are currently undeveloped but earmarked for advanced technology uses.
- The former Peugeot site in Ryton, on the edge of Coventry which is being redeveloped by Prologis. The site is part developed but has 90,000 sqm still available. The site is a key logistics site and significant in that Prologis was one of the first developers outside London to restart speculative build on units over 100,000 sqft since 2008.
- Phase 3 of the Birch Coppice Business Park which was granted planning permission in 2013. The scheme plans to deliver 1.1 million sqft of commercial space and could generate a further 1,000 jobs. Birch Coppice benefits from being home to the Birmingham Intermodal Freight Terminal, enabling businesses to take advantage of the West Coast railway for dock to door container deliveries.
- Rugby Gateway which is a major logistics development located at Junction 1 of the M6, approximately 3 miles from Rugby town centre. The site has outline planning consent for a mix of B1c, B2 and B8 uses and its developers offer bespoke design & build facilities to suit individual occupier requirements from 4,650 sqm to 92,900 sqm.
- Rugby Radio Station is a sustainable urban extension with outline approval for up to 75,000 sqm of B1, up to 15,500 sqm of B2 and up to 15,500 sqm of B8. The commercial development will form part of a major regeneration scheme that will also deliver new homes, schools, green spaces and associated infrastructure over a phased 20 year period.

**Table 5-4 Current employment sites of at least 2 ha**

Local authority	Site	Size (ha)	Comments
Coventry CC	<b>Former Peugeot Site - Ryton (allocated to Coventry through the RSS and DtC)</b>	<b>40</b>	<b>Sub-regional site started. Site C recently gained planning permission for 40,000 sqm of B1c/B2 and B8. Parcels DC1 and DC7 are the only ones that are currently vacant / not built.</b>
Coventry CC	Former Jaguar Site - Land between Browns Lane and Coundon Wedge Drive.	17	Sub-regional site not started
Coventry CC	Friargate - Land bounded by railway, Grosvenor Road, Manor Road	15	Sub-regional site not started, part of mixed use scheme <sup>9</sup>
Coventry CC	Land North of Jaguar Engineering Centre (Area 2000), Whitley Business Park	9	Sub-regional site not started
Coventry CC	Ironbridge Works, Ibstock Road	2	Part of mixed use scheme. Partial completion of one unit on site.
Coventry CC	Former Bell Green Goods Yard and Edgewick Park Industrial Estate A444	2	
<b>North Warwickshire BC</b>	<b>Birch Coppice Phase 3</b>	<b>28.6</b>	<b>Planning permission was obtained for Phase 3 of Birch Coppice in 2013</b>
North Warwickshire BC	Land at Rush Lane, Dosthill	6.8	Two sites with outline planning consent for B1/B2/B8 development.
North Warwickshire BC	Former Baddesley Colliery Site	40.1	Planning consent was granted in 1996 for car storage and distribution depot and railhead. However the site is unlikely to come forward for development.
North Warwickshire BC	Coleshill Hall Hospital, Coleshill	16.3	Planning consent was granted in 1995 for conversion of the former hospital building into office accommodation and development of additional new build office space on site.
North Warwickshire BC	Holly Lane, Atherstone	6.9	Option EM2 in the Site Allocations Plan, Preferred Options, February 2013
North Warwickshire BC	Land at A5/Holly Lane, Atherstone	5.1	Proposed for allocation in the Site Allocations Plan, Preferred Options (Feb 2013).

<sup>9</sup> These are identified by Coventry as sub-regional sites using the definition in Policy PA6 of the RSS.

Local authority	Site	Size (ha)	Comments
Nuneaton and Bedworth BC	Bayton Road	5.1	Outline planning permission B1/B2/B8
Nuneaton and Bedworth BC	Griff Clara (Extension to Bermuda Park)	4.7	Outline planning permission B1/B2/B8
Nuneaton and Bedworth BC	Prologis Park	2.1	Outline planning permission B1/B2/B8
<b>Rugby BC</b>	<b>Ansty Park</b>	<b>41.33</b>	<b>Developed – 7.54 ha Amount of land available – 33.79 ha</b>
<b>Rugby BC</b>	<b>Rugby Gateway</b>	<b>36</b>	<b>Outline approval for B2/B8 On 12<sup>th</sup> February 2014 reserved matters were approved for unit 1 for a warehouse with proposed floorspace of 20,903 sqm and a total proposed floorspace of 22,032 sqm</b>
<b>Rugby BC</b>	<b>Rugby Radio Station</b>	<b>29</b>	<b>Outline approval subject to signed section 106 Up to 75,000 sqm B1 Up to 15,500 sqm B2 Up to 15,500 sqm B8</b>
Rugby BC	HTA Precision	3.2	Planning permission for B1c/B2/B8 uses
Rugby BC	Malpass Farm 10ha (B1,B2,B8)	10	Site with permission but not developed (B1/B2/B8)
Stratford DC	Kineton Road, Southam	2.5	Planning permission B1/B2/B8
Stratford DC	Darlingscote Road, Shipston-on-Stour	2	Planning permission B1/B2/B8
Warwick DC	Former Fords Foundry, Leamington	2.4	Committed employment land
Warwick DC	Tachbrook Park, Leamington	6.1	Committed employment land
Warwick DC	Tournament Fields	15.5	Committed employment land
Warwick DC	Stoneleigh Park (National Agricultural Centre)	5	Committed employment land
Warwick DC	Stoneleigh Deer Park	5 <sup>10</sup>	Committed employment land.
Warwick DC	Former Honiley Airfield	10 <sup>11</sup>	Committed employment land
Warwick DC	Strategic allocations South of Warwick	8	Proposed allocation
Warwick DC	Thickthorn	8	Proposed allocation

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

<sup>10</sup> This is part of a larger site, 5 ha refers to additional land being provided as part of the redevelopment of the park.

<sup>11</sup> This reflects the developable area but the site is much larger.

## Consideration of the strategic case for new sub-regional employment site(s)

- 5.14. Beyond the quantitative aspect of the need for additional sub-regional sites, the strategic need should also be considered. This relates to Coventry and Warwickshire's continued ability to remain competitive and attractive as a prime business location, attract investment and generate jobs. Given Coventry and Warwickshire's strength in key growth sectors such as advanced manufacturing and engineering, research and development and logistics it is important that the sub-region remains well placed to take full advantage of the opportunities arising from the ongoing economic recovery. The existing concentration of economic activity and established supply chains (along with the sub-region's strategic location, good transport links and skilled labour force) make Coventry and Warwickshire an attractive location for new firms wishing to locate there or existing firms wishing to expand.
- 5.15. The above are reflected in the vision and strategic priorities of CWLEP's Local Growth Deal Strategic Economic Plan: Working Draft (December 2013):
- "In the short term as a route to achieving our longer term vision, Coventry and Warwickshire will be recognised as a **global hub in the advanced manufacturing and engineering (and associated) sectors**, with business and research links across the world. Building on its central location, **employment sites**, distinctive businesses, innovation assets and highly talented workforce, by 2025 Coventry and Warwickshire will be **a high performing economy with our innovative businesses competing internationally**, growing and providing better paid employment opportunities for all of our residents across both our rural and urban areas."*
- 5.16. 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 and retaining local businesses, especially in terms of the sub-region's key business sectors:
- "Our investment in employment sites and planning will focus on the ensuring the provision of sufficient land and sites to support housing, our targeted sectors and wider business growth ambitions."*
- 5.17. 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.
- 5.18. 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.
- 5.19. 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.

- 5.20. 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.

## Consideration of the market need for new sub-regional site(s)

- 5.21. 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.
- 5.22. According to the market perspective of Jones Lang LaSalle (JLL), there are two key growth sectors that will drive the demand for sub-regional 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).
- 5.23. 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.
- 5.24. 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.
- 5.25. 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.
- 5.26. Dot.com fulfilment centres are likely to be attracted to the sub region due to its proximity and relationship with Birmingham. Given improved rail competitiveness 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.

- 5.27. 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.
- 5.28. 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.
- 5.29. 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.
- 5.30. 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 those areas or sites that are not protected.
- 5.31. 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.
- 5.32. Sites would need to be a minimum of c.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.
- 5.33. In JLL view which was echoed by the other market agents and developers attending the consultation event, there is a need for more than one new sub regional 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.
- 5.34. 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 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.
- 5.35. 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.

- 5.36. 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.
- 5.37. 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.
- 5.38. 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.
- 5.39. 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 were 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.

## Conclusion

- 5.40. Considering the quantitative, strategic and market perspectives outlined above, it is recommended that CWLEP and the individual local authorities continue to consider the possibility of allocating an additional large employment site of sub-regional significance that would be able to meet the future needs of the identified key growth sectors over and above those captured in the quantitative analysis. The following section considers a number of sites that could potentially fulfil this role.

## Site assessment

### Long list of potential sites

- 5.41. This section assesses a number of sites that could potentially fulfil the role of a sub-regional employment site. Table 8-1 (Appendix B) lists all sites suggested for consideration as a sub-regional site and discounts from further assessment those that are considered to be too small to fulfil the function of a sub-regional site. The information in Table 8-1 has been compiled from the following sources:
- Information supplied by CWLEP following its "open-call for sites" exercise, September – October 2013;

- Future development opportunities identified in CWLEP's working draft of the Strategic Economic Plan, December 2013
- Suggestions made at the stakeholder consultation event held in January 2014.

5.42. Based on this initial assessment, the following sites were identified as warranting further consideration:

- Phoenix Way, near Coventry
- Bermuda extension 1, south west of Nuneaton
- Bermuda extension 2, south of Nuneaton
- Curdworth (1), North Warwickshire
- Birch Coppice Extension, North Warwickshire
- Power station B site, Hams Hall, North Warwickshire.
- Hillfields Farm, Ansty, north east of Coventry
- Brandon Lane Fruit farm, south east of Coventry

#### **Coventry & Warwickshire Gateway (Zones A and B)**

5.43. Table 8-2 (Appendix B) provides an assessment of the short-listed sites in terms of a number of criteria including:

- Size;
- Potential use;
- Public transport accessibility;
- Relationship to the strategic highway network;
- Accessibility;
- Proximity to areas of need; and
- Planning constraints.

5.44. The criteria used for the assessment are explained in

5.45. Table 8-3.

5.46. It is noted that the assessment does not consider any existing or proposed planning policy constraints such as green belt designations or site specific policies in existing or emerging local plans. The advantage of this 'policy-off' approach is that it enables any site to be considered. However, any sites identified through this process as 'suitable', would not automatically be appropriate in planning policy terms, Further analysis would be required to consider whether any such site would cause a significant conflict with wider planning objectives and spatial strategy.

5.47. Coventry is the economic centre of gravity of the CWLEP area. It is the sub-region's main urban centre and it is projected to accommodate approximately half of the sub-region's population growth over the coming years. It is also an area with higher than average levels of unemployment and deprivation. Accordingly, if an additional employment site is to realise its value to the CWLEP sub-region as a whole, it should normally be well related to the Coventry area. Within the wider urban area based in and around Coventry, any relationship to the Coventry to Nuneaton Regeneration Corridor would be of particular value. The Corridor lies partly within the city of Coventry and partly in Warwickshire with the northern area including the principal settlements of Nuneaton and Bedworth. Over the last 20 years this area has experienced significant decline with several wards falling within the 10% worse performing in England.

5.48. Accordingly, the suggested sites at Curdworth and Hams Hall near Coleshill, can be discounted for this reason, as they both occupy locations which are strategically peripheral to the CWLEP

sub-region, and would have closer links to the Greater Birmingham economy than the core of the Coventry and Warwickshire economy. However, discussions should be held with the Greater Birmingham and Solihull LEP, as it is possible that these sites could play a role in addressing that LEP's future employment needs.

- 5.49. Discussions at the stakeholder event suggested that large sites were needed of over 20 ha. This is necessary to accommodate the large footprints of many modern buildings, to provide flexibility for future change and expansion, and to provide opportunity to create a high quality environment under the control of the developer and/or land manager. The suggested site at Bermuda Extension 1 is only 16 ha. It was nevertheless included in the assessment in case there was a good case for increasing its size to meet the required minimum of 20 ha. However, the proposed site has essentially been conceived as an extension to an existing industrial estate, and any further increase in size might start to impact on the open gap between Nuneaton and Bedworth. Accordingly Bermuda Extension 1 is discounted from further consideration.
- 5.50. There was a perception amongst stakeholders that a high quality environment was a pre – requisite for a sub regional site – although this may not be so essential if the need was for a logistics park. A high quality environment is considered to be necessary to attract the higher value uses like advanced manufacturing and research and development. Given the lack of large high quality sites in urban areas, it was felt likely that a green field and/or a green belt location would be necessary. The Bermuda extension 2 site has been conceived as an extension to the existing Bermuda Industrial Estate. This Estate provides an important role in providing for local employment needs in Nuneaton and Bedworth and is well related to the Nuneaton to Coventry regeneration corridor but does not afford the high quality environmental context required for a sub-regional site, although with the proposed Bermuda railway station it would appear to be a highly sustainable location for addressing local needs.
- 5.51. The suggested site at Phoenix Way to the north of Coventry is also well related to the Nuneaton to Coventry regeneration corridor and appears to have potential to provide excellent road access, taking advantage of the site's location off the A444, just to the south of Junction 3 of the M6. Although situated in the Green belt, the site is bounded by the built up edge of Coventry to the east, by warehouses to the south and by strategic highways to the north and west. However, given that the site is well screened by roadside trees and hedges along the A444, by an embankment on the B4113, and by residential development on Wilson's Lane the site might struggle to achieve a visual prominence. In addition, the need to incorporate significant amounts of landscaping to provide a buffer to adjacent residential and commercial properties is likely to reduce the net developable area to under 20 ha. In addition, there are pylons and power lines crossing part of the site and there are a large number of uninspiring agricultural buildings both on and adjoining the site, which might constrain both the location and type of future development. Consequently, it would appear that this site might be more appropriate for accommodating more local employment needs although it is worth noting that the site is not identified in the Nuneaton and Bedworth Borough Plan Preferred Options document published in 2013.
- 5.52. These considerations leave Hill Fields Farm, Brandon Lane Fruit Farm and the Coventry and Warwickshire Gateway sites as the remaining possibilities. All sites are strategically located in terms of their relationship to the Coventry area, each could provide sites of over 20 ha, and all have the potential to provide high quality environments.
- 5.53. Land north of the A45 (Whitley Business Park) already has planning permission but development has stalled partly due to inadequate access. The Gateway scheme seeks to overcome that difficulty and provide Jaguar's World Head Quarters with an entrance it merits and needs. South of the A45 the proposal utilises partly 'brownfield', substantially contaminated land to provide manufacturing and logistics space in addition to a high profile Technology Park.
- 5.54. The Coventry and Warwickshire Gateway sites (Zones A and B) require major infrastructure improvements. A planning application for the Gateway sites has been called in for determination by the Secretary of State and will be the subject of an Inquiry. Both Coventry City Council and Warwick District Council have indicated that they are minded to approve the application. The proponents of the scheme have stated that all infrastructure needs arising from the Gateway

proposal (most significantly the highway access, including access to the Whitley Business Park, remediation of contaminated land and significant landscaping) will be provided and funded from the development. This has been accepted by both local planning authorities. In addition, the proposal is only deliverable and viable (particularly given the likely infrastructure costs) if both zones A and B are developed. Accordingly, Gateway zones A and B are being proposed by the developer as a single site.

- 5.55. Zone B of the Gateway aims to create a high profile Technology Park adjacent to the A45 with an emphasis on automotive, aeronautical and digital businesses, providing up to 4,000 jobs. Zone A of the Gateway aims to provide up to 343,000 square metres of floor space for logistics and manufacturing businesses, providing up to 6,000 jobs. If the application is approved and the infrastructure improvements are deliverable, then the Gateway sites would clearly provide two areas capable of having a sub-regional role. There is policy support in the Warwick District Council Local Plan (Revised Development Strategy) for a sub-regional employment site in this broad location.
- 5.56. The Brandon Lane Fruit Farm site is located on the outskirts of Coventry about 500 metres east of the A45/A46 Toll Bar junction, within 2 kilometres of the Technology Park proposed at the Gateway site. The exact extent of this potential site is unclear and no assessment has been carried out of the feasibility of accessing this site from the A46. The site is separated from the built up area of Coventry by the A46 and therefore provision of public transport to such a site could be problematic. In addition, development of this site which appears to lack a sense of containment might be hard to reconcile with effects on 'openness' which is an important factor in determining impacts on green belt objectives. Due to these factors and the proximity to the Gateway sites, it is not recommended that the Fruit Farm site be investigated further, unless the Gateway sites fail to gain planning permission or prove to be undeliverable.
- 5.57. This leaves the suggested Hillfields Farm site which is 8 kilometres further north east on the A45/A46 from the proposed Gateway Technology Park. The site appears to include land immediately to the south of the Rolls-Royce site off Coombe Fields Road, as well as land to the south west of Ansty Park (i.e. immediately west of Hill Park Wood). This location would clearly benefit from its proximity to the strategically important M6/M69 interchange and could extend the cluster of advanced manufacturing activities based around the nearby Rolls-Royce facility and the Manufacturing Technology Centre on Ansty Park.
- 5.58. The land to the south of Rolls-Royce currently provides an open buffer between built development and Coombe Country Park which is listed as Grade II\* in the English Heritage Register of Parks and Gardens, includes a Site of Special Scientific Interest and a number of listed buildings, including the Abbey buildings which have a Grade I listing. The Park lies within a Conservation Area and contains a Scheduled Ancient Monument – a tumulus considered to be a prehistoric burial mound. Given this high level of sensitivity, it would seem prudent to avoid development on land between Rolls-Royce and Coombe Country Park.
- 5.59. Land immediately west of Hill Park Wood appears to have a more unconstrained location. Even though there is a green belt designation, the proximity of this area of land to the strategic highway network, the urban edge of Coventry and Ansty Park, severely compromises its rural context, and provide the possibility of a relatively contained site. However, a watercourse runs through the site and has associated flood zones (2 and 3) alongside it. In addition, Hill Park Wood, is classed as an ancient semi-natural woodland, whilst to the south of the site lies Walsgrave Hill Farmhouse which is a grade II listed building and a public footpath which provides a useful link over the A46 between Coombe Country Park and the Coventry urban area. These combined constraints would make development of the site very challenging and therefore this site is not recommended for further investigation despite its clear locational advantages.

## Conclusions

- 5.60. Based on the supply / demand analysis presented in Chapter 4, the existing identified supply of employment land will not be sufficient to meet the sub-region's future employment land requirements to 2031, leaving a shortfall of at least 16 ha. This assessment is based on the

Cambridge Econometrics employment forecasts and the City Deal's target of delivering 8,800 new advanced manufacturing and engineering jobs by 2025. It also assumes that there will not be a substantial loss of employment land to other uses over the assessment period and that all identified available sites are fit for purpose, deliverable and able to meet businesses' future requirements, especially those of the key growth sectors.

- 5.61. In reality it is likely that not all of these assumptions will be entirely met and therefore the sub-region is likely to meet more than 16 ha of additional employment land beyond the currently identified available sites (with planning permissions or allocations). Therefore a quantitative argument could be made for the need to provide a new major employment site. This is further supported by the projection of past gross completions across the sub-region which show an average of 33 ha of employment land being developed per year.
- 5.62. From a strategic perspective, there is merit in considering the allocation of an additional sub-regional employment site that would allow the sub-region to remain well placed to take advantage of its competitive advantages in key growth sectors such as advanced manufacturing and engineering, research and development and logistics. The assessment of various potential sub-regional sites has identified a number of sites should be considered by CWLEP and the local authorities for this role.
- 5.63. The Coventry and Warwickshire Gateway site (Zones A and B) in particular satisfies all the sub-regional site criteria outlined at the beginning of this chapter. It is located close to Coventry which is one of the sub-region's key areas of need for new jobs and regeneration. The Gateway site is of substantial size and could help meet the needs of key growth sectors such as advanced manufacturing and engineering. 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 in CWLEP's Local Growth Deal Strategic Economic Plan: Working Draft (December 2013) as being part of Coventry and Warwickshire's "recognised assets and resources" which will form the building blocks for the LEP's strategic economic plan.
- 5.64. 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 sub-regional employment site.
- 5.65. 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.
- 5.66. It should be stressed that Coventry and Warwickshire Gateway's planning application is currently the subject of a call-in inquiry and the above findings are not meant to influence the outcome of this application which needs to be judged based on a wide range of considerations beyond the site's possible economic impact and potential to play the role of a sub-regional employment location.

## 6. Conclusions and recommendations

### Future employment land requirements

- 6.1. The study has considered a range of employment land need scenarios for the period 2011-2031 based on a range of different forecasting approaches. It is noted that any forecasting method is sensitive to the assumptions underpinning it including the proportion of employment in each sector that relates to each of the B use classes, the split of full- and part-time employment by sector and the employment densities and plot ratios applied to each of the B use classes in order to convert employment numbers into floorspace and land requirements.
- 6.2. Furthermore, the scenarios tested reflect the employment and housing projections of the Cambridge Econometrics forecasting model, the joint Strategic Housing Market Assessment and the employment growth objectives of the Coventry and Warwickshire City Deal. None of the above provide a universally agreed basis for the assessment of future employment land need however for the following reasons:
- The employment forecasts of Cambridge Econometrics are likely to differ from those of other forecasting houses and even the outputs of the same forecasting model can change significantly over time and therefore reflect the point in time in which they were produced;
  - The SHMA's assessed housing need does not necessarily align with all local authorities' housing growth plans and there are various issues regarding the demographically-driven labour supply growth figures used in the SHMA (as discussed in Chapter 4);
  - The advanced manufacturing and engineering employment growth targets of the Coventry and Warwickshire City Deal are very different to Cambridge Econometrics' employment forecasts for these sectors; and
  - The linear projection of past gross completions may not necessarily predict with accuracy future development levels.
- 6.3. With the above caveats in place the four scenarios assessed provide a useful analysis of the sub-region's future employment land requirements.
- 6.4. According to the Cambridge Econometrics forecasts, employment in the sub-region is projected to increase by some 77,600 jobs (FTEs) over the period 2011-2031, an increase of 21%. Approximately 44% of this employment growth (34,300 FTEs) is expected to be in B use class sectors and primarily in B1a/b uses. Converting this level of employment growth into floorspace and land requirements, the sub-region is estimated to need an additional 996,400 sqm of B class floorspace which translates into an indicative requirement of at least 201 ha of additional employment land. B1a/b requirements are projected to increase by 58 ha, B1c by 16 ha and B8 by 133 ha while B2 requirements are projected to reduce by 5 ha.
- 6.5. The requirement for an additional 201 ha of employment land is purely quantitative and assumes that any surplus B2 land will be reused for other employment uses and that all existing employment sites are fit for purpose and will remain in employment use over the assessment period. Therefore the actual additional employment land requirements are likely to exceed this estimate.
- 6.6. The results of the SHMA-linked scenario suggest Coventry and Warwickshire will need a minimum of 115 ha of additional employment land to meet the sub-region's housing and population growth over the period 2011-2031. This should be considered the absolute minimum amount of employment land the sub-region should plan for as it assumes that all employment growth will result from population growth. Furthermore, Chapter 4 outlined several limitations in the use of these projections.

- 6.7. The higher growth scenario was developed based on the Coventry and Warwickshire City Deal growth targets relating to advanced manufacturing and engineering. The City Deal's high growth targets for these sectors are in line with the views expressed in the stakeholder consultation event and the market perspectives of developers and property agents active in the sub-region. According to its projections, the sub-region will need at least 326 ha of additional employment land over the period 2011-2031. As with the base Cambridge Econometrics scenario this also assumes that all existing employment sites are fit for purpose and there will be no significant loss of employment land to other uses over the assessment period.
- 6.8. The scenario based on the observation of gross past completions suggests that if past trends were linearly projected over the period to 2031, the sub-region would need some 659 ha of employment land. This does not consider any parallel loss of employment sites to other uses however and does not offer any certainty that past trends (which may have been influenced by a range of local, sub-regional, national and international factors) will continue to be reflected in future years.
- 6.9. By considering all four scenarios, it is recommended that the City Deal aligned scenario which suggests an additional need of at least 326 ha is used as the basis for planning Coventry and Warwickshire's future employment land requirements over the period 2011-2031. This is because this scenario reflects the strategic growth priorities of the Local Enterprise Partnership and allows some flexibility on top of the findings of the base Cambridge Econometrics employment growth scenario.

## Supply and demand balance

- 6.10. The assessment of the supply of employment land was not part of the scope of this study. Therefore the supply and demand balance is based on information gathered from the previous employment land studies undertaken by the individual local authorities as well as information provided by the local authorities during the course of this study.
- 6.11. Based on a compilation of each local authority's extant permissions and allocations, the sub-region has an identified supply of some 358 ha of employment land. This appears sufficient to meet the identified need for 326 ha but assumes that all available sites are fit for purpose and will be developed over the assessment period. However, at least 48 ha of employment land (mostly in Coventry) have either been committed for release or are likely to be lost to other uses because of poor quality or other constraints.
- 6.12. There is therefore a quantitative need to provide at least 16 ha of employment land on top of the currently identified available sites. It is recommended that as part of the ongoing monitoring of the sub-region's supply of employment land, all employment sites currently in employment use or identified for future employment use (sites with permissions or allocations) are assessed in terms of their fitness for purpose, ability to meet the needs of the sub-region's key growth sectors, viability and deliverability. This would enable a more thorough assessment of the balance between supply and demand across the sub-region.

## The case for additional sub-regional employment sites

- 6.13. 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. 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.
- 6.14. 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.

- 6.15. 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 draft 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.
- 6.16. In this context, it is recommended that CWLEP and the individual local authorities consider the allocation of an additional large employment site of sub-regional significance that would be large and flexible enough to meet future business needs, particularly those of the sub-region's key growth sectors while providing new employment opportunities for Coventry and Warwickshire's residents.
- 6.17. 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 is considered to be best placed to fulfil the role of a sub-regionally significant employment site for the following reasons:
- It is of sufficiently large size;
  - 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.
- 6.18. The assessment presented in Chapter 5 identified a number of other sites that could potentially play the role of a sub-regional employment site and the review of sites with existing consent and/or allocation identified four sites that could also play sub-regional role. These are the former Peugeot site near Ryton-on-Dunsmore, Phase 3 of Birch Coppice Business Park, Rugby Gateway at M6 J1 and the major urban extension at the former Rugby Radio Station which has the potential to deliver a significant amount of new employment land.
- 6.19. Any site considered for a sub-regional role would need to be assessed in terms of a range of environmental, planning, transport and other considerations which are beyond the scope of this study. It is therefore up to the local authorities and the Local Enterprise Partnership to further consider the recommended and short-listed employment sites and discuss and agree as part of their duty to cooperate an agreed way forward.



## 7. Appendix A: Stakeholders consulted

7.1. 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.

## 8. Appendix B: Assessment of potential sub-regional sites

**Table 8-1 Long list of sites suggested for consideration as a sub-regional site**

Local Authority	Site Name	Location	Ha	Proposed uses	Access	Comments (land availability / development capacity / availability) and promoters website (where known)	Conclusions
Nuneaton and Bedworth	Phoenix Way	South of J3 of the M6 and east of the A444	23	B1, B2, B8	Currently constrained although access from A444 or B4113 may be possible.	Green Belt location. Has been suggested to Nuneaton and Bedworth but not currently in their Preferred Options.	Warrants further consideration.
Nuneaton and Bedworth	Bermuda extension 1	South and west of existing Bermuda Park	16	B1, B2, B8	From existing Bermuda Park (Griff Lane)	Green Belt location. Preferred Option IDP identifies key issues with the site. Further work is being done by the Council with infrastructure providers to identify necessary requirements to bring site forward.	Warrants further consideration
Nuneaton and Bedworth	Bermuda extension 2	Land to east and west of B4113 Coventry Road to north of Griff roundabout.	46	B1, B2, B8	From B4113 (Coventry Road)	Green Belt location. Preferred Option IDP identifies key issues with the site. Further work is being done by the Council with infrastructure providers to identify necessary requirements to bring site forward.	Warrants further consideration
North Warwickshire	Curdworth (1)	Land at A4097 and west of Wishaw lane, near to J9 of M42	70	B1, B2, B8	Via A4097 Kingsbury Road. Land s of canal (3.2 ha) may be accessible from A4097. Remainder would require further highway works.	Access to major part of site may require more significant highway access works.	Warrants further consideration
North Warwickshire	Curdworth (2)	Land at A4097, abutting J9 of M42	8	B1, B2, B8	Via A4097 Kingsbury Road and Dunston Park.	Green Belt location. Likely to be available for earlier release than site 1 owing to access issues.	Too small, discount from further

Local Authority	Site Name	Location	Ha	Proposed uses	Access	Comments (land availability / development capacity / availability) and promoters website (where known)	Conclusions
							consideration.
North Warwickshire	Power station B site	Land to NW of BMW plant, Hams Hall	20	B8	From existing roads within Hams Hall.	Previously developed land - former power station site, but Green Belt location. Has been promoted for warehousing and distribution in past however applications refused.	Warrants further consideration
North Warwickshire	East of Birch Coppice	South of Dordon	82	B2, B8	From Birch Coppice	Site suggested as a potential extension to Birch Coppice and as suitable for logistics and/or automotive industries	Warrants further consideration
Rugby	Hillfields Farm	Land to west and south of Ansty MIS and Rolls Royce site.	N/K	B1, B2, B8, A1, A3, C1, C2, C3, D1, D2	From Central Bvd (Ansty) for western part and Combe Field Road for southern part. No formal assessment undertaken.	Green Belt location. Two areas. Western part - possibly long term opportunity if Ansty expands. Southern part possibly as part of extension to Rolls Royce site. No formal assessment made to date. The Hillfields Farm site has not been previously promoted through the RBC Core Strategy/Local Plan process, however, it was considered as part of a much larger site. In addition, a site called Walsgrave Hill Farm, west of the A46, was proposed as a mixed use site in response to a Call for Sites issued by RBC in 2012.	Warrants further consideration
Rugby	Brandon Lane Fruit farm	Land south of A46 and adjacent to Toll Bar End	N/K	B1, B2, B8	From A46 - subject to assessment.	Green Belt location. This site has not been previously promoted through any Core Strategy/Local Plan process.	Warrants further consideration
Stratford-on-Avon	Wildmoor	South of Alcester Road, Stratford-upon-Avon	20	B1	Access from Wildmoor roundabout or proposed western relief road	Allocated in Intended Proposed Submission Core Strategy (July 2013) - Proposal SUA.2 for B1(a) & (b). Considered suitable by SDC as an allocation in Core Strategy. Note that 10 ha is for relocation of businesses from	Half of site to be used for relocation of existing businesses, leaving balance of

Local Authority	Site Name	Location	Ha	Proposed uses	Access	Comments (land availability / development capacity / availability) and promoters website (where known)	Conclusions
						Stratford Canal Quarter Regeneration Zone.	around 10 ha and therefore too small. Discount from further consideration.
Stratford-on-Avon	Wellesbourne Distribution Park	Adjacent to airfield, south of B4086 Stratford Road	14	B8, B1a	From B4086	56,000 sq m warehouse /office floorspace with planning permission	Too small and already committed. Discount from further consideration.
Stratford-on-Avon	Arden Forest Industrial Estate	North of B4089 Arden Road, Alcester	11	B1, B2, B8	From B4089	Allocated in Intended Proposed Submission Core Strategy (July 2013) – Proposal ALC.3 Considered suitable by SDC as an allocation in Core Strategy. No known site promoter at present.	Too small. Discount from further consideration.
Stratford-on-Avon	Winyates Green Triangle and Gorcott Hill, Mappleborough Green	North and south of A4023 and west of A435 on eastern edge of Redditch	19	B1, B2, B8	Off A4023	Allocated in Intended Proposed Submission Core Strategy (July 2013) – Proposals REDD.1 and REDD.2 Considered suitable by SDC as an allocation in Core Strategy.  Land identified specifically to meet the needs of Redditch.	To meet the specific needs of Redditch. Discount from further consideration.
Warwick	Fen End (Honiley airfield)	West of A4177 approximately 4km south of Balsall Common	10	B1, B2	New access onto Honiley Road required by current consent	Part of site previously developed but in green belt location. 10 ha relates to the developable area but overall site significantly larger. Site is allocated in local plan and has planning permission but is restricted to automotive industries.	Too small. Discount from further consideration.

Local Authority	Site Name	Location	Ha	Proposed uses	Access	Comments (land availability / development capacity / availability) and promoters website (where known)	Conclusions
						Site would not be suitable as a sub-regional site because it is not well located to the strategic highway network or to areas of need.	
Warwick	Coventry & Warwickshire Gateway (zone A)	Land to south and west of airport and south of A45	88	B2, B8	New road access from A45/A444	Part of site previously developed. Green Belt location. 343,740 sq m of B2/B8 of which up to 104,000 sq m is B1	Warrants further consideration
Warwick	Coventry & Warwickshire Gateway (zone B)	Land to south and west of airport and south of A45	33	B1, A1, A3, A5, C1, D1	New road access from A45/A444	Part of site previously developed. Green Belt location. 65,032 sq m of B1, 4,645 sq m car showroom, 2,300 sq m ancillary A1, A3, A4, A5, 11,617 sq m hotel	Warrants further consideration

**Table 8-2 Assessment of potential sub-regional sites**

Site Name	Size	Potential role and investment attractiveness	Public Transport	Relationship to Strategic Highway Network	Access	Links/Proximity to areas of need	Comments
Phoenix Way, near Coventry, Nuneaton and Bedworth District.	23	Prominent site suitable for B1, B2, B8	Nearest current bus service on Wilsons Lane to east of site. Site would be between 1 to 2 km of proposed new rail station at Arena Park.	Within 1 km of Junction 3 of the M6 and A444 dual carriageway	Currently constrained although access from A444 or B4113 may be possible.	Within 2 km of areas of need in Coventry and Bedworth	Green Belt.
Bermuda extension 1, south west of Nuneaton, Nuneaton and Bedworth District.	16	Lacks visibility, may be attractive to B2 and B8 uses	Would need discussion with bus operators	Adjacent to A444 dual carriageway and within 4 km of Junction 3 of the M6	From existing Bermuda Park (Griff Lane). Junction improvements required.	Within 5 km of areas of need in Bedworth and Nuneaton	Site proposed in Preferred Options for Borough Plan.
Bermuda extension 2, south	46	Proximity to existing businesses on	Accessible by bus and potentially by rail on	Within 1 km of Griff roundabout and A444	From B4113 (Coventry Road).	Within 2 km of areas	Site proposed in Preferred

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Site Name	Size	Potential role and investment attractiveness	Public Transport	Relationship to Strategic Highway Network	Access	Links/Proximity to areas of need	Comments
of Nuneaton, Nuneaton and Bedworth District.		Bermuda Park may be attractive to local rather than national investors. B2 and B8 uses likely.	completion of proposed Bermuda Station	dual carriageway, which would be accessed via a dualled section of the B4113	Junction improvements required	of need in Nuneaton	Options for Borough Plan.
Curdworth (1), North Warwickshire Borough.	70	Lacks visibility, may be attractive to B2 and B8 uses.	Bus services to Tamworth and Birmingham available on Kingsbury Road, but extension into site would need discussion with bus operators.	Within 1 km of M6 toll road and Junction 9 of the M42.	Small part of site could be accessed via A4097. Wishaw Lane appears to be unsuitable as access road, so major highway works including bridge over canal would be required to access the site.	Within 5km of area of need in east Birmingham	Green Belt.
Birch Coppice Extension, North Warwickshire	82	Birch Coppice has been a successful location for logistics firms and has attracted suppliers of automotive parts.	Rather infrequent bus services to Tamworth.	Within 1 km of Junction 10 of the M42	Possibly from existing Birch Coppice site but needs further assessment.	Within 5 km of deprived areas of Tamworth but poor public transport access.	Site appears to relate more to Tamworth and Staffordshire economy.
Power station B site, Hams Hall, North Warwickshire Borough.	20	Most likely demand considered to be for logistics	Buses from Faraday Avenue provide link to Coleshill and Birmingham International. Site within 2 km walk of Coleshill Parkway.	Within 1 km of Junction 9 of the M42 and Junction 10 of the M6 Toll Road	From existing roads within Hams Hall.	Not very accessible by public transport from east Birmingham. Coleshill Parkway provides link to Birmingham and Nuneaton, but site is over 1 km away from station.	Green Belt.
Hillfields Farm, Ansty, north east of Coventry,	N/K	Demand is likely to be strong for such a prominent and well	The X30 bus service links Ansty Park to Coventry Rail Station and the City	Within 1 km of the M69 and Junction 10 of the M40, and the A46 and	From Central Bvd (Ansty) for western part and	With 2 km of East Coventry	Green Belt

Coventry & Warwickshire  
Assessment of sub-regional employment land requirements

Site Name	Size	Potential role and investment attractiveness	Public Transport	Relationship to Strategic Highway Network	Access	Links/Proximity to areas of need	Comments
Rugby Borough.		located site. Potential uses include B1, B2, B8, A1, A3, C1, C2, C3, D1, D2	Centre. Proposed site would be over 800 metres from bus stop.	A4600 dual carriageways.	Combe Field Road for southern part. No formal assessment undertaken.		
Brandon Lane Fruit farm, south east of Coventry, Rugby Borough.	N/K	B2, B8 – other higher value uses may prove difficult.	Site is not close to any existing services. Bus operators may not be interested unless very large site developed.	Within 1 km of A45 and A46 dual carriageways	From A46 - subject to assessment.	Within 2 km of East Coventry, but accessibility appears limited.	Green Belt
Coventry & Warwickshire Gateway (Zone A)	88 ha (net)	Zone A is a proposed logistics park of up to 343,740 sqm of B2/B8 floorspace, of which the B2 floorspace will be up to 104,000 sqm.	New and improved bus services planned. Proposals for 10 minute frequency to Coventry, Warwick and Leamington Spa; 30 minutes frequency to Kenilworth, Warwick Parkway and Warwick University.	Within 1 km of A45 and A44/A46 dual carriageways.	New road needed from A45/A444	Within 3 km of SW Coventry	Green belt
Coventry & Warwickshire Gateway (Zone B)	33 ha (net)	Zone B is a proposed technology hub that will include a mixture of B1, A1, A3, A4, A5 and C1 uses.  According to the scheme's Planning Statement, Zone B will provide up to 65,000 sqm of B1 floorspace primarily aimed at the high value automotive, aerospace and	New and improved bus services planned. Proposals for 10 minute frequency to Coventry, Warwick and Leamington Spa; 30 minutes frequency to Kenilworth, Warwick Parkway and Warwick University.	Within 1 km of A45 and A44 dual carriageways.	Requires construction of new grade separated junction onto A45 Stonebridge Highway and construction of new link road through Jaguar Whitley to the A444	Within 2 km of south west Coventry	Green Belt

Site Name	Size	Potential role and investment attractiveness	Public Transport	Relationship to Strategic Highway Network	Access	Links/Proximity to areas of need	Comments
		digital technology sectors.					

**Table 8-3 Assessment criteria**

Criterion	Green/Excellent	Yellow/Good	Amber/Caution	Red/Concern
Size	Over 35 ha	25 to 35 ha	15 to 25 ha	Under 15 ha
Demand	High	Good	Fair	Limited
Public Transport	Good existing or proposed bus and rail services	Good existing or proposed bus or rail services	Provision of bus or rail services appears feasible	Provision of bus or rail services appears doubtful
Strategic Highway Network	Within 1 km of motorway junction or access to dual carriageway	Within 2 km of motorway junction or access to dual carriageway	Within 2 to 5 km of motorway junction or access to dual carriageway	Over 5 km to motorway junction or access to dual carriageway
Access	Clearly deliverable	Minor issues	Significant issues	Major issues
Proximity to Need	Within 2 km of area of deprivation	Within 2 to 5 km of area of deprivation	Within 5 to 10 km of area of deprivation	Over 10 km from area of deprivation





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Our Ref: PJF/lec/C166/PF/7458  
(Please reply to Banbury office)

9 January 2012

The Forward Planning Team  
North Warwickshire Borough Council  
The Council House  
South Street  
Atherstone  
CV9 1DE

Dear Sirs

**TOWN AND COUNTRY PLANNING ACT 1990  
DRAFT CORE STRATEGY**

The following submissions are made on behalf of Ashford Developments Ltd in respect of the provision of land for employment to meet wider Regional needs, specifically in the context of provision Strategic Rail Freight Interchanges (SRFI). These forms of development are generally encapsulated within the description Regional Logistics – Policy PA9 – of the West Midlands Regional Spatial Strategy.

Policy PA9 as recommended for change by the Examining Panel following public examination of the issues for rail freight warehousing and distribution sites states, inter alia

*RLS with existing or potential dedicated rail access to freight routes with at least W8 loading gauge and close proximity to a junction that would provide access to the SRN or other principal roads should be identified in Core Strategy DPDs.....*

The Panel recommended that ‘possibilities to be explored further for provision of RLS include Brinsford, Four Ashes, Cannock, Fradley and Meaford’ (para 7.46). The recommended change to para 7.46 of RSS Phase 2 was purposefully identifying locations where a RILS might be located – and was not intended to be exclusive of the consideration in other areas that could serve the needs of Metropolitan Area including potential further provision within North Warwickshire.

The Panel ‘endorsed the findings’ of the updated survey undertaken by MDS Transmodal and Savills which indicated that ‘4-5 new sites’ would be required (Panel’s Report para 5.27) The Panel thereafter recommended that provision should be made within the RSS (Policy

PA9) for at least 200-250 ha'. While it is acknowledged that the Borough has accommodated SRFIs at Hams Hall and Birch Coppice, such provision should not in itself be a reason to 'ring fence' North Warwickshire Borough from making provision for further SRFI sites – if such locations are in the best interests of the wider West Midlands regional economy.

The draft NPPF states at para 29-30

*Local planning authorities should have a clear understanding of the business needs within the economic markets operating in and across their area (emphasis added). To achieve this they should*

- *Work together with county and neighbouring authorities and with local enterprise partnerships (emphasis added) to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market;*
- *and work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.*

It is submitted that presently the draft Core Strategy has failed to have a clear understanding of the needs for SRFIs to serve the West Midlands economy throughout the plan period.

It is considered that there is a need to prepare 'robust evidence' with engagement of the Greater Birmingham and Solihull LEP, Birmingham City Council and other authorities that adjoin the metropolitan urban area. A similar form of the study has in the past been undertaken when determining potential future locations for Premium Employment Sites – as originally identified in the former PPG10 (the original regional planning guidance for the West Midlands).

In November 2011 the Department for Transport issued Strategic Rail Freight Interchange Policy Guidance. The main objectives of Government policy for SRFIs are to:

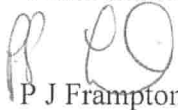
- a) reduce road congestion
- b) reduce carbon emissions
- c) support long-term development of efficient rail freight distribution logistics
- d) support growth and create employment

The Government aims to 'meet these objectives by encouraging the development of a robust infrastructure network or strategic importance in facilitating trade links between UK regions and the European Union'.

While the Government expects the industry to identify potential SRFI sites, local planning authorities should co-operate together with the LEP to identify the future scale of development and the broad locations where such development should be accommodated in order to meet the needs of the regional economy. Presently such a study has not been undertaken. The draft Core Strategy is considered not sound in respect of this particular development need.

On behalf of my Client I have written separately to the LEP, and the City of Birmingham seeking their views on the preparation of a joint study which I have referred to.

Yours sincerely

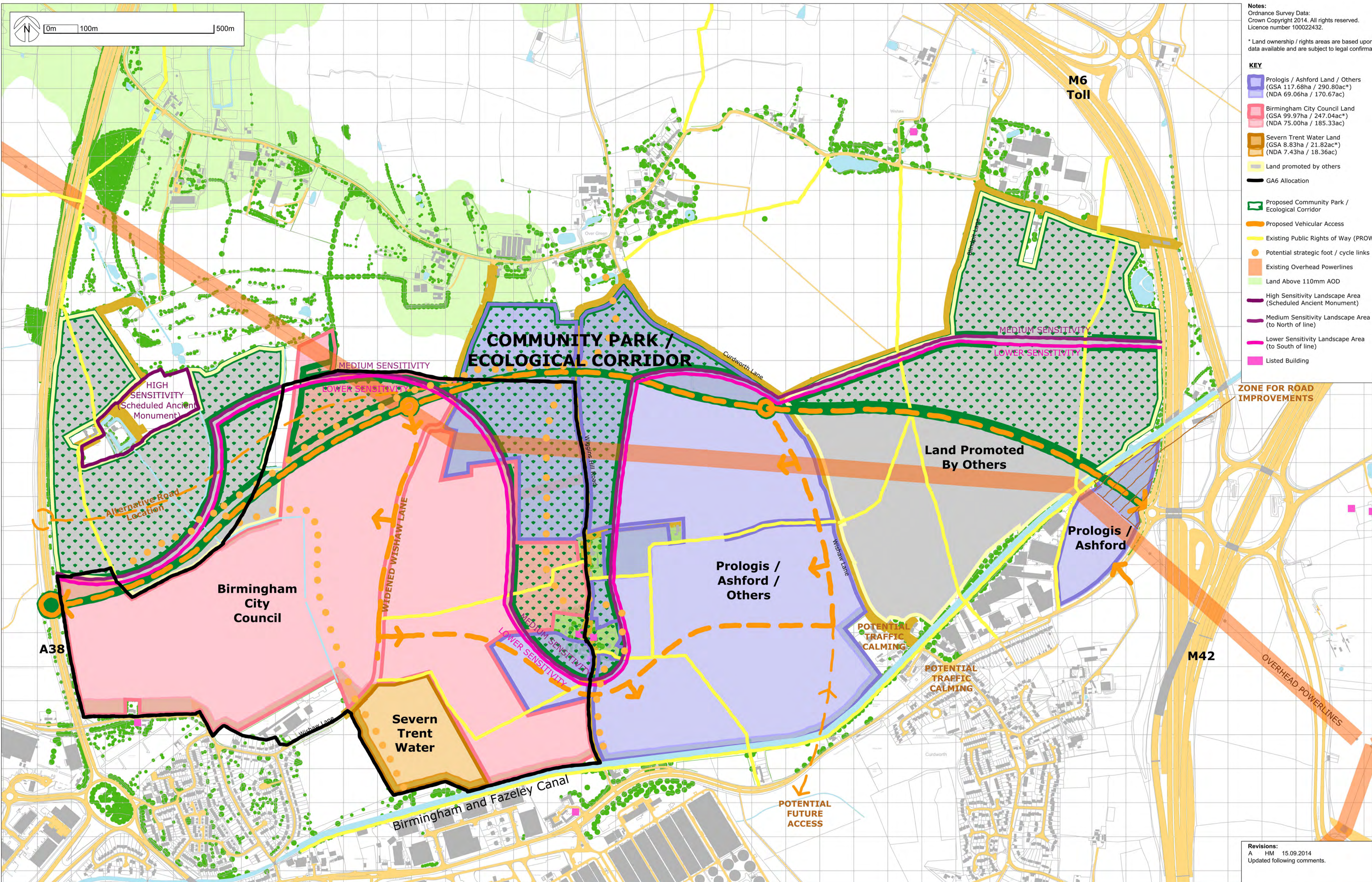


P J Frampton

*(Signed in the absence to avoid delay)*

Cc: Mr M Ashford  
Mr R Ashford





**Notes:**  
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\* Land ownership / rights areas are based upon data available and are subject to legal confirmation.

**KEY**

- Prologis / Ashford Land / Others (GSA 117.68ha / 290.80ac\*) (NDA 69.06ha / 170.67ac)
- Birmingham City Council Land (GSA 99.97ha / 247.04ac\*) (NDA 75.00ha / 185.33ac)
- Severn Trent Water Land (GSA 8.83ha / 21.82ac\*) (NDA 7.43ha / 18.36ac)
- Land promoted by others
- GA6 Allocation
- Proposed Community Park / Ecological Corridor
- Proposed Vehicular Access
- Existing Public Rights of Way (PROW)
- Potential strategic foot / cycle links
- Existing Overhead Powerlines
- Land Above 110mm AOD
- High Sensitivity Landscape Area (Scheduled Ancient Monument)
- Medium Sensitivity Landscape Area (to North of line)
- Lower Sensitivity Landscape Area (to South of line)
- Listed Building

**Revisions:**  
 A HM 15.09.2014  
 Updated following comments.



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