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Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council Joint Employment Land Review **Final Report**

July 2011



Prepared for

**Newcastle-under-Lyme Borough Council and Stoke-on-Trent
City Council**



Revision Schedule

Final Report July 2011

Rev	Date	Details	Prepared by	Reviewed by	Approved by	
01	1/12/10	Employment Land Review	Mark Phillips Principal	Alan Houghton Head of Planning and Regeneration	Alan Houghton Head of Planning and Regeneration	
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1 Introduction

1.1 Scope of Study

1.1.1 In August 2010 URS/Scott Wilson was commissioned along with GH Regeneration, Butters John Bee and Adroit Economics to prepare an Employment Land Review on behalf of Stoke on Trent City Council and Newcastle under Lyme Borough Council.

1.1.2 This report provides an assessment of the economic demand/need for employment land to 2026 and existing supply for the two authorities. It draws conclusions from this analysis and sets out a portfolio of sites, suggested delivery arrangements and policy recommendations to achieve this.

1.1.3 The approach to the review is consistent with the former ODPM guidance on conducting Employment Land Reviews¹.

- **Stage 1:** ‘Taking stock of the existing situation’ has involved an assessment of existing employment land stock in quantitative and qualitative terms to reach a view on whether any existing employment sites should be considered for non-employment uses.
- **Stage 2:** ‘Creating a picture of future requirements’ has involved a critical review of property market trends and prospects for key segments alongside projections of future employment growth sectors at district level. Employment forecasts have been translated into land requirements using a bespoke methodology.
- **Stage 3:** ‘Identifying a new’ portfolio of sites has involved an assessment of current supply, as defined in stage 1 against future requirements identified in stage 2 to determine key gaps in provision and a suitable portfolio providing sufficient quantity and quality of employment sites.

1.1.4 This report is structured as follows:

- Chapter 2 sets out the planning policy context for economic development;
- Chapter 3 provides a thorough set out of stakeholder and development industry consultations which set out views held in respect of the demand and supply of employment land in the two local authority areas;
- Chapter 4 takes stock of the existing employment land situation and presents an assessment of existing employment land provision through a criteria based site appraisal methodology. It updates the employment land supply position and identifies sites that should be realistically taken forward for more detailed analysis;
- Chapter 5 develops a forward view of future requirements for employment land in Stoke and Newcastle. It achieves this through an assessment of

¹ Office of the Deputy Prime Minister (2004) (now referred to as the Department for Communities and Local Government (DCLG)) “Employment Land Reviews – Guidance Note December 2004”.

- i. historic take up trends; and
 - ii. econometric forecasting which forecasts future land requirements according to forecasts in employment growth, extrapolation of historic inward investment trends (using data provided by Instaffs), assessment of needs of small firms and relocation/modernisation needs of existing occupiers;
- Chapter 6 identifies a new portfolio of sites for Stoke and Newcastle and compares the demand /need and supply assessments undertaken for Stoke and Newcastle to identify where there is consistency or mismatch, to inform LDF and economic policy development and to derive policy recommendations;
 - Chapter 7 sets out a Delivery and Intervention Strategy for the site Portfolio; and
 - Chapter 8 sets out a series of policy recommendations.

2 Planning Policy and its Role in Economic Development

2.1 Introduction

2.1.1 This section outlines the planning policy context for economic development in the Borough of Newcastle-under-Lyme and the City of Stoke-on-Trent. This involves an analysis of relevant national, sub-regional and local planning policy documents.

2.2 National Planning Guidance

Planning Policy Statement 1 (PPS1) – ‘Delivering Sustainable Development’, 2005

2.2.1 PPS1 sets out the overarching planning policies on the delivery of sustainable development through the planning system. It specifies that the aims of sustainable development should be pursued in an integrated way through a sustainable, innovative and productive economy that delivers high levels of employment, and a just society that promotes social inclusion, sustainable communities and personal well being, in ways that protect and enhance the physical environment and optimise resource and energy use.

2.2.2 A key government objective for the planning system that is detailed in PPS 1 is that planning should facilitate and promote sustainable, inclusive patterns of urban and rural development by contributing to sustainable economic development. PPS1 also highlights that in planning for sustainable development, local authorities should aim to promote a strong, stable economy that brings jobs and prosperity for all and ensures that sustainable locations are available for economic development so that the economy can prosper.

Planning Policy Statement 4 (PPS4) – ‘Planning for Sustainable Economic Growth’, 2009

2.2.3 PPS4 sets out the Government's comprehensive policy framework for planning for sustainable economic development in urban and rural areas. A number of policies are set out within PPS4 that provide guidance in relation to delivering sustainable economic development, including:

- *Policy EC1 (Using Evidence to Plan positively)* requires local authorities to prepare an evidence base that assesses the need for land/floorspace for economic development, including for all main town centre uses over the plan period.
- *Policy EC2 (Planning for Economic Growth)* requires local authorities to ensure that development plans: set out a clear economic vision and strategy for economic growth; support existing business sectors; make efficient and effective use of land, prioritising previously developed land; and positively plan for the location,

promotion and expansion of clusters or networks of knowledge driven and high technology industries.

- *Policy EC3 (Planning for Centres)* identifies that local planning authorities (LPAs) should, as part of their economic vision for their area, set out a strategy for the management and growth of centres over the plan period.
- *Policy EC5 (Site Selection and Land Assembly for Main Town Centre Uses)* highlights that LPAs should identify an appropriate range of sites to accommodate the identified need, ensuring sites are capable of accommodating a range of business models.
- *Policy EC6 (Planning for Economic Development in Rural Areas)* states that LPAs should strictly control development in open countryside away from existing settlements and should locate new development in or on the edge of local service centres where employment, housing (including affordable housing), services and other facilities can be provided close together.
- *Policy EC10 (Determining Planning Applications for Economic Development)* identifies that LPAs should adopt a positive and constructive approach towards planning applications for economic development.

Employment Land Reviews: Guidance Note, 2004

- 2.2.4 The guidance note on preparing employment land reviews was released by the then Office of the Deputy Prime Minister in December 2004. The purpose of the guidance note is to provide planning authorities with effective tools with which to assess the demand for and supply of land for employment. The guidance aims to help authorities assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher value uses and help identify those sites that are no longer suitable for employment development, which should be made available for other uses.
- 2.2.5 The guidance note sets out the types of employment land uses that employment land reviews should focus on. These include: offices (both in town centres and elsewhere, including those for public administration); light and general industry; wholesale and freight distribution; and high technology premises (including research, business and science parks). The note also highlights how employment land reviews should form part of the review of policies and sites that are allocated in local development frameworks.
- 2.2.6 A three stage process is recommended within the guidance note, which sets out a suggested approach for local authorities to take when preparing employment land reviews:
- Stage 1 (Taking Stock of the Existing Situation) – This stage involves a simple assessment of the ‘fitness for purpose’ of the existing employment land portfolio. It

allows for the 'best' employment sites to be identified and retained and allows for sites to be identified that should clearly be released for other uses.

- Stage 2 (Creating a Picture of Future Requirements) – This stage involves the assessment of future requirements for employment land (and premises).
- Stage 3 (Identifying a 'New' Portfolio of Sites) – Stage 3 represents a detailed site assessment and search. The aim of this stage is to confirm which sites are likely to respond well to the expectations of occupiers and property developers and also meet sustainability criteria.

2.3 Sub-regional Planning Guidance

West Midlands Regional Spatial Strategy (January 2008)

2.3.1 The proposed abolition of the West Midlands Regional Spatial Strategy (RSS) was announced in July 2010. However, the strategy incorporated a number of measures relating to the North Staffordshire conurbation (which incorporates Newcastle-under-Lyme and Stoke-on-Trent) and the need to provide a portfolio of employment sites. The RSS identified how a portfolio of employment sites should be developed in accordance with the Spatial Strategy which included the following hierarchy of sites.

1. First Tier sites/locations of regional significance (including Regional Investment Sites, Major Investment Sites and Regional Logistics Sites). Within Stoke-on-Trent and Newcastle-under-Lyme, the following are classified as first tier sites:

Stoke-on-Trent

- Chatterley Valley (Area 3), Sandyford
- Trentham Lakes, Trentham

Newcastle-under-Lyme

- Chatterley Valley, Phase ii (Peacock Hay)

2. Second Tier, locally-significant employment (including Sub-Regional Employment Sites and Good Quality employment sites). Within Stoke-on-Trent and Newcastle-under-Lyme, the following are classified as Sub-Regional Employment Sites:

Stoke-on-Trent

- Chatterley Valley (area 1, 2 and part area 13)
- Bankeyfields (Reginald Mitchell Way, Sandyford)
- Radial Park, Sideway
- Chatterley Whitfield, Chell Heath
- Caradon Twyfords Excelsior Works, Cliffe Vale

- Hanley Economic and Festival Court, Festival Park
- Wades and Trade Park 4, Festival Park
- Etruria Valley (North & South), Etruria
- H & R Johnson Site, Tunstall
- Land off Lordship Lane, Fenton
- Land south of Media Way, Festival park
- Site off City Road, Fenton

Newcastle-under-Lyme

- Chatterley Valley (Chatterley Sidings and Lowlands Plot A)
- Keele Science Park, Keele
- Lymedale Employment Park, Chesterton

2.3.2 It is of note that two sizeable employment sites are located just outside of Stoke's administrative boundary. Blythe Bridge in Staffordshire Moorlands of 50 hectares was identified in the RSS as a Regional Investment Site and the former Creda/Indesit site in Meir is identified as a major employment site by Stafford BC.

2.4 Local Planning Guidance

Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy (Adopted October 2009)

- 2.4.1 The Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy has been prepared jointly by Newcastle-under-Lyme Borough Council and the City of Stoke-on-Trent Council for the 20 year period between 2006 and 2026. The strategy is the core document that has been prepared as part of the Newcastle-under-Lyme and City of Stoke-on-Trent Local Development Frameworks and sets out the overarching spatial planning framework for the two areas.
- 2.4.2 The administrative boundaries of the two authorities and study boundary are shown in Figure 1 in the Appendix.
- 2.4.3 The Core Strategy includes a series of aims for the Newcastle-under-Lyme and Stoke-on-Trent area. Strategic Aim 5 highlights the need to foster and diversify the employment base of all parts of the plan area, including the development of new types of work and working lifestyles, and supporting the office development sector and new technologies. Strategic Aim 7 identifies the need to enhance the roles of both the City Centre of Stoke-on-Trent as a sub-regional commercial centre and of Newcastle Town Centre as a strategic centre.

- 2.4.4 The Core Strategy incorporates a number of strategic and spatial principles that set out how economic development will be delivered within the plan area. These are included within the following policies:

Policy SP1 (Spatial Principles of Targeted Regeneration)

- 2.4.5 Policy SP1 identifies a number of principles related to economic development for the plan period. The policy states that employment provision will be focussed towards accessible sites to and within the North Staffordshire Regeneration Zone. It also highlights the importance that Chatterley Valley (designated as the area's Regional Investment Site), Staffordshire University and Keele University and Science Park will have in diversifying the economy of the plan area.

Policy SP2 (Spatial Principles of Economic Development)

- 2.4.6 Policy SP2 is the key policy in terms of setting principles for economic development within the plan area. The policy highlights the importance of diversifying and modernising the centres of the plan area for new business investment and identifies the City Centre of Stoke-on-Trent as the main focus for mixed use regeneration incorporating new office led schemes and Newcastle Town Centre as a focus for office development.
- 2.4.7 The policy identifies the importance of harnessing the creative and knowledge assets of North Staffordshire, in particular investment in Keele University and Keele Science Park, The University Quarter including Staffordshire University and University Hospital. Capitalising on the potentially strong geographical position of the plan area, promoting it as a tourist destination are also identified as key principles for delivering economic development.
- 2.4.8 The justification for Policy SP2 identifies the supply of employment land within the plan area as of 1st April 2006. Table 1.1 below is taken from the Core Strategy and highlights that the Regional Spatial Strategy (RSS) target for employment land (between 2006 and 2026)² within the Borough of Newcastle-under-Lyme is 112 ha. Within the City of Stoke-on-Trent, the target is 220 ha. The table shows that as of 1st April 2006, there was a shortage of employment land within the Newcastle-under-Lyme Borough and a surplus in the City of Stoke-on-Trent.

² Although the Regional Spatial Strategy for the West Midlands has been abolished, both Newcastle-under-Lyme Borough Council and the City of Stoke-on-Trent Council will continue to use the RSS employment land, comparison retail floorspace and new office floorspace targets within the Joint Core Strategy.

Table 1.1: Availability of employment land within the plan area as of 1st April 2006 (Source: Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy)

	Newcastle-under-Lyme	Stoke-on-Trent
Sub – regional employment sites (ha)	53	67
Good quality employment sites (ha)	28	177
Other employment sites (ha)	2	26
Total current provision (ha)	83*	270
RSS target 2006 – 2026 (ha)	112	220
Additional sites to be identified (ha)	29	-

* Does not include the RIS site at Peacock Hay, Chatterley Valley

2.4.9 The justification for Policy SP2 also identifies the targets (as set by the RSS for the West Midlands) for new office floorspace and comparison retail floorspace. Within the Newcastle-under-Lyme Borough, a target of 60,000m² is set for new office floorspace and a target of 35,000m² is set for comparison retail floorspace. Within the City of Stoke-on-Trent, a target of 85,000m² is set for new office floorspace and a target of 120,000m² is set for comparison retail floorspace.

2.4.10 The Core Strategy also includes a series of area spatial strategies for various parts of the plan area, which have implications for economic development. These include:

- *Policy ASP1 (City Centre of Stoke-on-Trent Area Spatial Policy)* highlights how the City Centre has a primary role at a sub-regional level in attracting large scale shopping development. The policy states that a new central business district will be provided in the south western sector of the city centre to help diversify the local economy.
- *Policy ASP2 (Stoke-on-Trent Inner Urban Core Area Spatial Policy)* identifies Etruria Valley as being a major mixed use area for employment in the south and Stoke Town Centre as being a focus for regeneration led by employment and services.
- *Policy ASP3 (Stoke-on-Trent Outer Urban Area Spatial Policy)* sets out scope for additional retail development in Longton and Fenton and the aim for diversification of the economy through focused employment development at Chatterley Whitfield Sustainable Enterprise Park and the Chatterley Valley Regional Investment Site.

- *Policy ASP4 (Newcastle Town Centre Area Spatial Policy)* highlights how 25,000m² of additional gross comparison retail floorspace will be provided within the Town Centre up to 2021 and a further 10,000m² to 2026. It also highlights how 60,000m² of additional gross office floorspace will be provided in the Town Centre up to 2026. The policy further highlights the importance of strengthening the financial and professional sector within Newcastle Town Centre.
- *Policy ASP5 (Newcastle and Kidsgrove Urban Neighbourhoods Area Spatial Policy)* further identifies the Chatterley Valley site as important in terms of providing employment opportunities in accordance with its identified role as the plan area's Regional Investment Site.
- *Policy ASP6 (Rural Area Spatial Policy)* further highlights the role that investment in Keele University and Science will play in facilitating the growth and competitiveness of high value business development, which will help increase local job opportunities within the plan area.

**City of Stoke-on-Trent Development Portfolio Development Plan Document
 (Preferred Options, June 2006)**

- 2.4.11 The purpose of the Development Portfolio Development Plan Document (DPD) is to make site allocations for delivery of strategic development targets within the City of Stoke-on-Trent and identify relevant detailed policy areas. The document also identifies the portfolio of employment sites located outside of the inner urban core including large sites at Trentham Lakes South (33.9 ha), Radial Park (24 ha) and Chatterley Valley (20.7 ha).
- 2.4.12 The DPD contains a number preferred policy options that have implications for the development of employment land within the City of Stoke-on-Trent. These are detailed below.
- *Policy SS7* states that the loss of class B employment land will not be permitted unless it can be demonstrated that such loss would not be detrimental to the economic prospects of the City of Stoke-on-Trent.
 - *Policy SS8* highlights that office developments that attract large numbers of people on a daily basis should be located within the City Centre and other town centres within Stoke-on-Trent.
 - *Policy SS10* states that the City Council, in co-operation with regeneration partners will aim to accelerate the take up of employment land by, where appropriate by:
 - Supporting acquisition of key development sites;
 - Considering acquisition of derelict sites and preparing them for development through reclamation;
 - Promoting joint ventures between public and private sectors in assembling and developing employment sites;

- Promoting the city as a sound location for investment; and
- Directly or jointly assisting in marketing and publicising employment development sites.

City of Stoke-on-Trent Area Action Plans

- 2.4.13 The City of Stoke-on-Trent Council is in the process of preparing a number of area action plans for various parts of the city. The council are currently preparing area action plans for the City Centre and Etruria Corridor and the Inner Urban Core.
- 2.4.14 **City Centre and Etruria Road Corridor Area Action Plan (Pre-Publication Stage, September 2010)**
- 2.4.15 The City Centre and Etruria Road Corridor Area Action Plan (AAP) is currently being prepared by the Council and the latest version to be released is the pre-publication stage report. The purpose of the area action plan is to provide detailed planning policies to guide and help deliver the sustainable regeneration of the City Centre over the next fifteen to twenty years. One of the key outcomes of the of the emerging plan is the need to create a regionally recognised business district in the City Centre for high quality office developments as well as promoting a range of mixed use areas. It should be noted that the AAP provides details on some of the key sites that are available for development located around the City Centre and Etruria Road.
- 2.4.16 The AAP identifies a series of strategic issues for City Centre and Etruria Road. Strategic issue 2 relates to 'office options' and identifies the City Centre as a major source of employment. The strategic issue states that support will be given to existing jobs where possible and new sources of employment in retail, leisure and culture will be provided. An aspiration for the City Centre is to diversify the economy and encourage office and service sector employment.
- 2.4.17 The AAP also sets out a series of preferred spatial policies for the City Centre and Etruria Road area. In particular, policy SS4 relates to the delivery of employment land as it identifies the need to develop a vibrant regional City Centre through encouraging new diverse opportunities for employment development which accommodate varying commercial needs. The justification for the policy highlights how the business district is considered to be a first preference for office development.

Newcastle Town Centre Supplementary Planning Document (January 2009)

- 2.4.18 Newcastle Town Centre Supplementary Planning Document (SPD) sets out guidance across the whole range of planning and land use issues for the Town Centre. The development of the Town Centre will have implications for economic development in the Borough as it is the Borough's largest employment area. One of the key issues arising from the SPDs vision is that attracting new businesses, particularly offices, is vital to maintaining the vitality of the centre, bringing in potential customers for the retail and leisure offer, both during the day and on return visits.

- 2.4.19 A key element to the SPD is the spatial framework that it sets out for Newcastle Town Centre. Work is in progress to update the SPD to provide design and planning guidance for the town centre. It is anticipated that the update will identify three Comprehensive Development Areas in the Town Centre SPD boundary, including Blackfriars, Nelson Place and Ryecroft.

RENEW North Staffordshire Masterplans

- 2.4.20 In addition to the work being done by the City of Stoke-on-Trent Council and Newcastle-under-Lyme Borough Council, a number of masterplans have been prepared by the housing market renewal pathfinder for North Staffordshire, RENEW, which could have implications for employment land in some areas of the North Staffordshire. A series of area regeneration frameworks (ARF)³ have been prepared for a number of areas including Knutton and Cross Heath, Middleport and Burslem, Etruria Valley, City Centre North West, Northwood, City Waterside, University Quarter, Stoke, Shelton and Meir.

Stafford Local Planning Authority

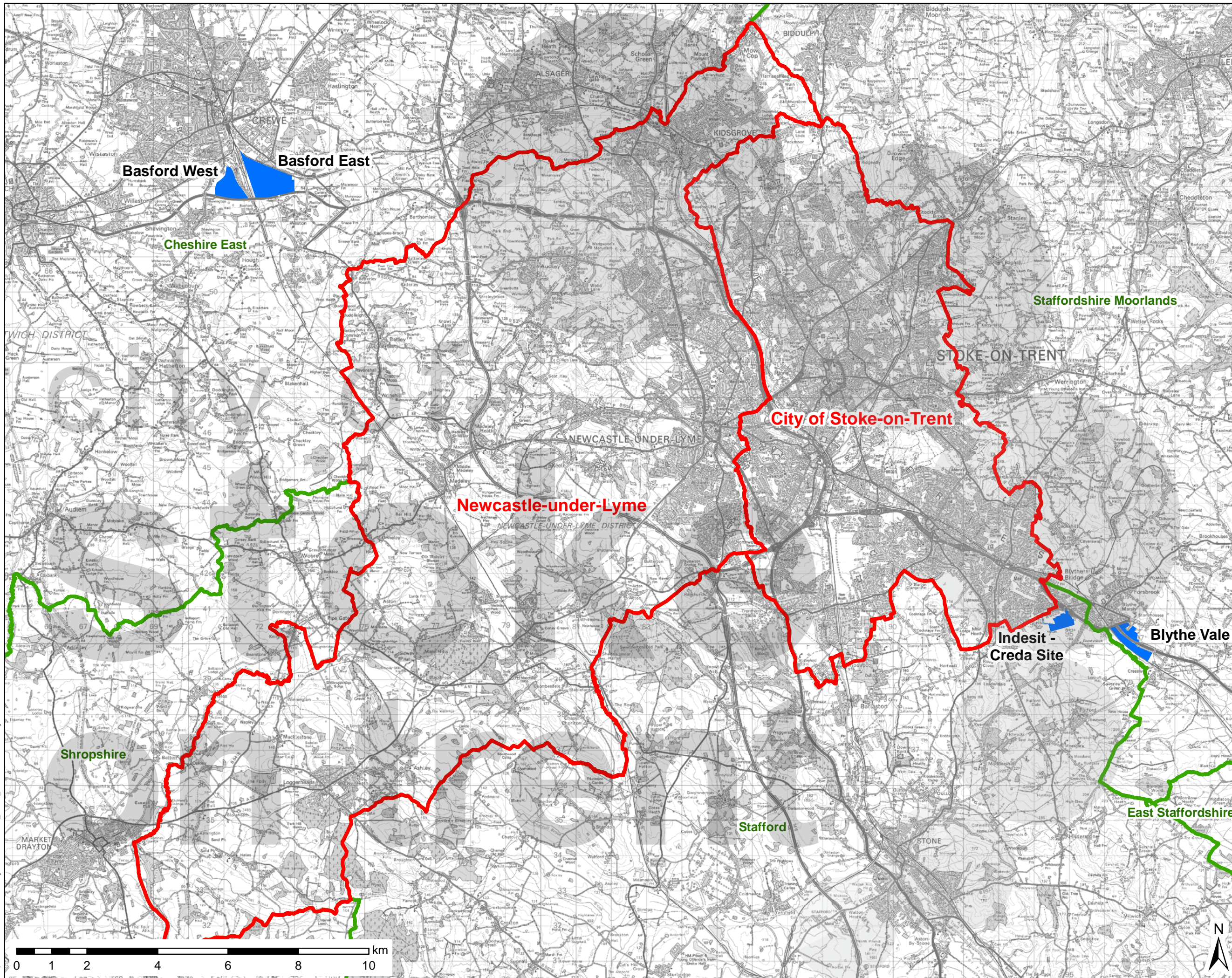
- 2.4.21 The local authority area of Stafford is located towards the south of Stoke-on-Trent. In terms of preparing its Local Development Framework, the council has recently consulted on their draft Core Strategy Policies document. The council also recently published an Employment Land Review (August 2010), which highlights how the Borough has a total of around 85ha of employment land. When considering the portfolio of employment land in relation to the categories used in the West Midlands Regional Spatial Strategy, the borough has no Regional Logistics Site, Major Investment Site or Regional Investment Site. The only major site that the employment land review suggests to retain that is close to the border of Stoke-on-Trent is the former Creda/Indesit site in Meir.

Staffordshire Moorlands Local Planning Authority

- 2.4.22 The local authority area of Staffordshire Moorlands is located towards the east of Stoke-on-Trent. The council is currently in the process of finalising its Core Strategy, which when adopted will replace the Staffordshire Moorlands Local Plan. Within the Core Strategy, policy SS8 (Blythe Bridge Regional Investment Site) highlights how the regional investment site at the junction of the A50 with the Blythe Bridge bypass (close to the border of Stoke-on-Trent) shall be safeguarded for high quality development falling within Classes B1 and, where appropriate, B2 of the Use Classes Order to meet regional economic needs.
- 2.4.23 Figure 2 below shows neighbouring planning authorities and the location of the former Creda/Indesit and Blythe Bridge sites.

³ An area regeneration framework (ARF) is a housing market-focused, high-level masterplan that sets out a vision for the future regeneration of an area.

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NOTES

Sites on the Boundary of Stoke on Trent and Newcastle under Lyme

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Revision Details	By	Date	Suffix
	Check		

Drawing Status: **DRAFT**

Job Title: **STOKE ON TRENT AND NEWCASTLE UNDER LYME EMPLOYMENT REVIEW**

Drawing Title: **PROXIMITY OF SITES ON THE BOUNDARIES OF STOKE ON TRENT AND NEWCASTLE UNDER LYME**

Scale at A3: **1:100,000**

Drawn	DH	Approved	MP
Stage 1 check	Stage 2 check	Originated	Date
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Drawing Number: **FIGURE 2**

2.5 Economic policy/context

Integrated Economic Development Strategy for the North Staffordshire Conurbation (August 2005)

2.5.1 The IEDS was prepared for the City of Stoke-on-Trent Council, Newcastle-under-Lyme Borough Council and RENEW North Staffordshire and identifies four strategic opportunities for the North Staffordshire Conurbation. These include:

- creating thriving urban centres within North Staffordshire;
- developing the knowledge economy in the area;
- modernising and diversifying the economy; and
- developing North Staffordshire's population and business fulcrum through focussing action that collectively capitalises on the conurbation's excellent transport links to attract inward investment and develop the area as a potential UK hub for high-value economic activities.

2.5.2 The strategy also sets out a number of key objectives for North Staffordshire. These include:

- Arresting overall employment decline and delivering a growth of 5,000 jobs in the medium-term.
- Aspirating for growth of 25,000 jobs in the long-term, including 10,000 new jobs in consumer and business services.
- Halting population decline by 2012 and beginning to increase over the period to 2021.
- Substantially increasing the rate of new business formation
- Increasing both the proportion of the business base involved in knowledge industry and the proportion of the workforce that is highly skilled

Spatial Planning Aspects

2.5.3 The IEDS also includes a separate report that looks at the spatial planning aspects of the strategy. The IEDS aims to set out a framework for economic growth in jobs during the period up to 2021 and table 1.2 below outlines the forecast employment levels in key sectors within North Staffordshire. The table shows that the largest growth is predicted in financial and business services (11,800 jobs) and distributive change (8,800 jobs).

Table 1.2: Current and Future Employment Levels in Key Sectors (Source: IEDS report)

	2005	2012	2021	Change
Agriculture, etc.	400	300	300	-100
Mining & Quarrying	400	300	400	0
Manufacturing	30,000	26,800	23,600	-5,400
Electricity, Gas & Water	800	600	400	-400
Construction	6,900	7,400	7,800	+900
Distributive Trades	31,400	34,400	40,200	+8,800
Hotels & Catering	8,900	9,100	9,600	+700
Transport & Communications	9,800	10,500	11,700	+1,900
Financial & Business Services	16,700	20,800	28,500	+11,800
Government & Other Services	46,900	49,800	55,700	+8,800
Total	152,200	160,000	178,000	+25,800

2.5.4 The IEDS demonstrates that there is a requirement for 190 ha of employment land within North Staffordshire between 2005 and 2021. In broad quantitative terms (and assuming that land identified can be made available over the IEDS period), the IEDS states that there is an adequate supply of land to accommodate employment growth within North Staffordshire. However, the IEDS highlights the need for a qualitative review to confirm how much of the land identified could generally satisfy occupier requirements.

Transforming North Staffordshire (February 2008)

2.5.5 The 'Transforming North Staffordshire' report was prepared by the Work Foundation and provides an independent overview of the economic and social circumstances of North Staffordshire. The report considers North Staffordshire's economic geography to encapsulate the three local authority areas of the City of Stoke-on-Trent, Newcastle-under-Lyme and Staffordshire Moorlands. The report identifies a number of key issues that are present within North Staffordshire. These include:

- Due to the decline of employment in the manufacturing of ceramics, North Staffordshire needs to define a new 'purpose' for itself in the changing economy and to increase the proportion of higher skilled, higher value jobs in the area.
- The combination of the ongoing decline in employment in ceramics, the lack of growth in other employment sectors and too many regeneration projects not coming to fruition means that the development of the physical environment and the shifts in the economy that have occurred in other cities (i.e Manchester, Leeds and Sheffield) has not happened in North Staffordshire.
- There is a need to ensure that North Staffordshire benefits from its location between Manchester and Birmingham by attracting investors and skilled workers to relocate to the area.

Integrated Economic Development Strategy for the North Staffordshire Conurbation - Assessing the impact of the downturn on North Staffordshire (August 2010)

2.5.6 An update of the IEDS was prepared by RENEW North Staffordshire by Experian. The focus of the update report was to assess the impacts of the downturn on the economy and housing market in North Staffordshire. Some of the key findings of the report were that:

- Not only was North Staffordshire economy under performing in relation to the national and regional economy prior to the recession, failing to fully benefit from the 'boom years', but the sub-region has been severely impacted by the downturn.
- Businesses in North Staffordshire have been badly impacted by the recession, with two thirds of 2009 Business Survey respondents reporting conditions worsening over the past 12 months.
- 5,700 jobs have been lost from the North Staffs economy during 2009 alone. This represents a more rapid contraction than seen regionally and nationally.
- Stoke-on-Trent – the largest district and hence the driver of the broader sub-regional picture – has been hit slightly more severely by the recession when compared to Newcastle-under-Lyme, in large part as a consequence of the district's dependence on the manufacturing sector and particularly low-value sub sectors within it (such as traditional ceramics and machinery).

2.5.7 The North Staffordshire Regeneration Partnership (NSRP) has devoted considerable effort into identifying the challenges and potential on offer in North Staffordshire. Those elements of latest thinking which have spatial implications include:-

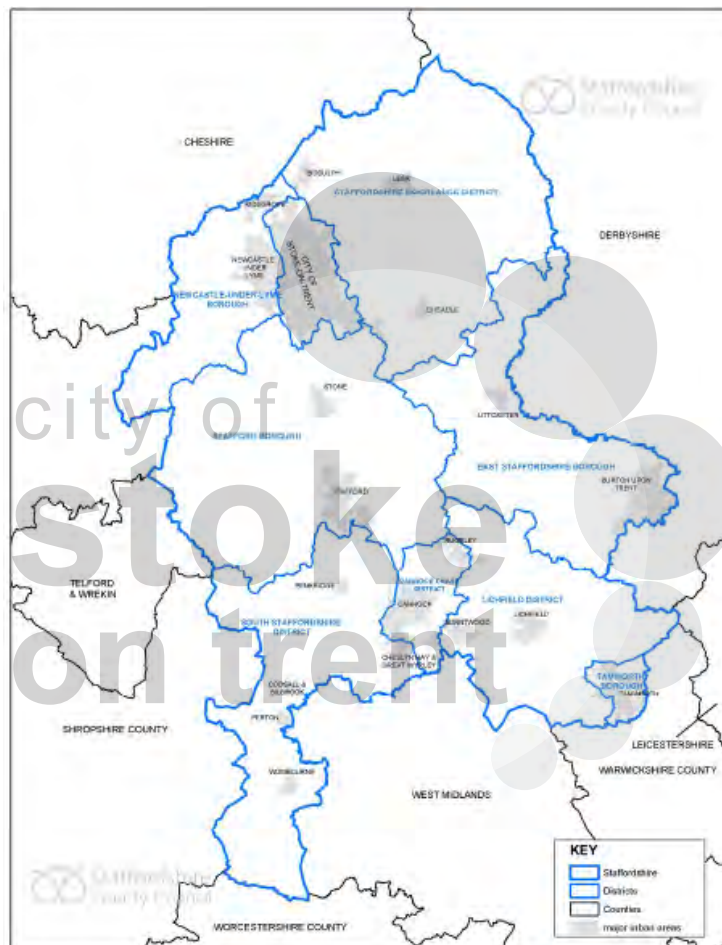
- Providing a core spatial strategy;
- Developing one clear city centre with a strong business district and cultural quarter;
- Building a network of distinctive, complementary town centres;
- Growing a University Quarter within the City;
- Developing Keele University as a hub for knowledge based business more closely linked to the conurbation;
- Improving sustainable transport infrastructure;
- Incorporating modern digital infrastructure ;
- Enhancing the business, residential, retail, leisure and tourism offer in all respects
- Promoting a mixed economy and mixed use developments;

- Sustaining growth in existing and emerging potential growth sectors including ceramics and design; medical, healthcare and environmental technologies and logistics;
- Diversification of the rural economy to redress decline in traditional rural employment for local residents.

Stoke-on-Trent and Staffordshire Local Enterprise Partnership

2.5.8 The proposal submitted for the creation of a Local Enterprise Partnership (LEP) for Stoke-on-Trent and Staffordshire was approved by Government in October 2010. The LEP bid encompasses numerous local authority areas including: Staffordshire Moorlands; the City of Stoke-on-Trent; Newcastle-under-Lyme; Stafford; East Staffordshire; Lichfield; Cannock Chase; and South Staffordshire (see figure 1 below).

Figure 1.1: Stoke-on-Trent and Staffordshire LEP area (Source: Stoke-on-Trent and Staffordshire - A proposal for a Local Enterprise Partnership)



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 Produced by the Research Unit, Development Services Directorate, Staffordshire County Council, 2010.

- 2.5.9 The proposal sets out how local businesses and residents will gain from the joining of the public and private sectors in Stoke-on-Trent and Staffordshire and highlights the importance of working with adjacent LEPs and authorities in England (and Wales) to reflect the economic connectivity and functioning of Stoke-on-Trent and Staffordshire.
- 2.5.10 The LEP has identified a series of key attributes that exist within the LEP area:
- A strong manufacturing sector and competitive costs for land and labour
 - Excellent connectivity across the UK and beyond
 - Strong highly specialist sectors of ceramics and health in the north and automotives in the south and east.
 - A growing rural economy
 - Universities that are a key part of the areas ability to innovate and boost enterprise.
- 2.5.11 The key messages from the LEP proposal are set out below.
- 2.5.12 Within the LEP area, Stoke-on-Trent and North Staffordshire displays the most serious economic weaknesses and the work to transform the economy (begun in 2007) will need ongoing support from the LEP. North Staffordshire will need to generate significantly more private sector jobs to reduce worklessness, increase graduate retention, raise the aspirations of its young people and attract new investment.
- 2.5.13 In a region showing one of the slowest economic growth rates in the UK, Stoke-on-Trent was the slowest within the region and the second slowest in England between 1995 and 2005. In terms of GVA per head in this period, it has fallen from 2% above regional average to 12% below. Although its stock of businesses has grown by 10% the size of the business base is still nearly 30% lower than regional average, illustrating its limited success in diversifying its business base and growing private sector jobs. Between 1998 and 2008, 20,900 private sector jobs have been lost with only about 4,000 created.
- 2.5.14 Overall levels of employment are lower than average and 29,000 people of working age have no qualifications. This is mirrored across the North Staffordshire economy. An over reliance on public sector jobs in Stoke-on-Trent and Staffordshire is identified and also a need to create at least 13,000 new jobs in the private sector to re-balance the economy.
- 2.5.15 The remit for the new LEP will include a focus on growing competitive businesses by delivering - growing competitive sectors including manufacturing and ceramics and niche sectors through an Industry Support Framework, and 'Creating the Conditions' for sustainable growth through the development of a Special Investment Zone (to incentivise inward investment and relocation), inward investment, first class office and commercial accommodation and modernising infrastructure in the towns and centres with North Staffordshire as a key priority.

- 2.5.16 The LEP is keen to secure (subject to Government agreement) a transfer of assets and ongoing projects from AWM to the LEP to ensure continued and effective delivery of services. This includes the assets of the Central Business District in Stoke-on-Trent, Keele University Phase 3, Lymedale Enterprise Centre, Towers Business Park and Chatterley Valley.
- 2.5.17 The LEP advocates the use of an evidence base, business intelligence and economic analysis focused on economic growth and business-relevant issues. It is hoped that this ELR helps to serve this purpose.
- 2.5.18 The local enterprise partnership submitted an unsuccessful Regional Growth Fund bid in January 2011 for seven commercial projects totalling £30million. The bids include:
- An expansion of the existing innovation centre at Keele University: to help the growth of high technology businesses
 - The development of processes to reduce energy consumption to maintain the UK's competitive edge in the global ceramics market
 - The creation of Media Place at Staffordshire University's Stoke campus that provides business start up space for the digital media sector
 - The development of a world class research and development centre at Alstom in Stafford
 - The creation of a Centre of Refurbishment Excellence (CoRE) - a national centre for excellence in refurbishment of buildings
 - The East West Centre Redevelopment which is a major city shopping and leisure development to complement the relocation and improvement of the bus station in Stoke-on-Trent
 - Central Business District (phase 1), a mixed use development in Stoke-on-Trent city centre designed to attract regional and national business and professional services firms
- 2.5.19 In April 2011 the LEP submitted an expression of interest for an Enterprise Zone at Etruria Valley. The precise content of the bid has just been finalised and this may include additional sites to achieve the maximum 150 hectare area and delivery by 2015 to benefit from the tax breaks on offer.

3 Stakeholder and Development Industry Consultations

3.1 Stakeholder Engagement in the public sector

3.1.1 The ODPM Guidance Note for Employment Land Reviews 2004 emphasises the value in consulting with stakeholders within the business sector and non local authority public sector to seek consensus on essential issues in relation to market aspirations and realities.

3.1.2 We held a series of discussions with a number of stakeholders to derive a broad picture of:

- Economic intelligence about the area and its competitors and key strategies
- The overarching direction for economic development
- Value and strength of sectors
- Key projects which have been supported and the rationale behind this.
- Priorities for the future

3.1.3 We consulted with the following bodies:

- Advantage West Midlands
- InStaffs
- Staffordshire and Black Country Business Innovation Centre (BIC)
- Staffordshire County Council
- Keele Science Park
- Economic Development Departments at Stoke on Trent and Newcastle under Lyme Councils
- North Staffordshire Chamber of Commerce

Staffordshire and Black Country Business Innovation Centre

3.1.4 Staffordshire and Black Country BIC is a not for profit enterprise agency and one of fifteen in the UK. It has been in operation for fifteen years and has its head quarters in Stafford.

3.1.5 The BIC is part of a European network of over 160 organisations which assist businesses and individuals to evaluate and develop inventions, innovations and technology related issues.

- 3.1.6 The BIC is supported by local sponsors, the European Regional Development Fund, UK Business Incubation, Advantage West Midlands, Business Link West Midlands, Staffordshire County Council and various other national and local funding organisations.
- 3.1.7 Staffs and Black Country BIC focuses on assisting local SME's:
- by providing advice on new product and new business ideas
 - through the provision of seminars and workshops to encourage innovation and New Product Development
 - by sourcing UK and European grants for funding and innovation
 - through the provision of incubation work-space and grow on accommodation combined with on-site business facilities, advice and support.
- 3.1.8 The BIC is part of the Staffordshire Business Support Consortium which is chaired by the county council and includes all the enterprise agencies in North Staffordshire.
- 3.1.9 The BIC has recently been granted a £1.3m European funded package over three years from Advantage West Midlands to provide in-depth support to help local high growth and high value businesses to grow. The BIC is already known locally for providing incubation start up support for businesses and this project will allow this support to continue but it will also allow the BIC to support customers virtually using modern technology to provide practical support and on-line business advice.
- 3.1.10 BIC operates twelve enterprise centres, four of which are in Newcastle (owned by Staffordshire County Council) - Newcastle Enterprise Centre, Knutton; Lymedale Business Centre; Lymedale Court Enterprise Centre; Silverdale Enterprise Centre and one in Stoke (owned by Stoke on Trent) at Chatterley Whitfield.
- 3.1.11 The four centres are home to circa 300 businesses. The centres offer a supported environment for SME's and incubation/start up accommodation. The space available ranges from 150 to 2,500 sq ft, most of which is offices.
- 3.1.12 Historically occupation rates have been high at circa 90%, however this has fallen during the current recession but shows recent signs of recovery – enquiries have doubled over the past three months. The BIC considers that pent up demand exists for managed workspace accommodation evidenced by Silverdale Enterprise Centre which was 75% let on opening in 2005.

Sectors

- 3.1.13 BIC briefly offered views on the area's key sectors:
- A very strong medical technologies and supply chain exists.

- A recognised creative industries cluster exists in Burslem offering specialist premises but image can be an issue.
- Ceramics – performing very well.
- ICT – across the north Staffordshire area ranging from creative digital to specialist IT provides. Approximately 10% of BIC centre tenants are in IT

Future priorities

3.1.14 BIC's brief views on what the future priorities should include for economic development were:

- Need to tackle low wages and raise income levels through focusing on high growth, high value businesses.
- Image and environmental quality
- Provision of more growth on space
- Revenue support for incubation may become an issue as the new Regional Growth Fund is likely to concentrate on capital projects.
- Investment in existing Stoke business centres.

Advantage West Midlands

3.1.15 Consultation was undertaken with the regeneration and development manager from Advantage West Midlands responsible for Stoke and Newcastle. AWM is the Regional Development Agency for the West Midlands and is one of nine RDAs in England established in 2000 to transform the English regions through sustainable economic development.

3.1.16 The government announced in June 2010 that RDAs will cease to exist beyond March 2012 and that economic development and regeneration will be led by Local Enterprise Partnerships (LEPs) and local authorities. Details about the form, function and funding of LEPs were contained within the government 'White Paper Local Growth: Realising Every Place's Potential' in October 2010.

3.1.17 In addition government funding for RDAs has been cut significantly by £300 million nationally. For Advantage West Midlands this means a requirement to make approximately £40 million of savings from planned expenditure for this year (2010-11).

3.1.18 In terms of employment land AWM held the view that there is a shortage of sites in public ownership and of sites which are over ready i.e. without constraints. It was also felt that site owners are sitting on sites with potentially unrealistic value aspirations or have sites tied up in JV's.

3.1.19 It was felt that there was a need to address these issues by prioritisation and investment where available. It was felt that there was a need to look at proactive

planning allocation and that there was scope to consider publicly held land for land swapping with the private sector i.e. – local authority held residential sites for attractive developer held sites for employment use. This was a concept also supported by other public sector agencies.

- 3.1.20 It was felt that Stoke in particular owned a considerable portfolio of sites and premises without an occupational strategy and that a disposal/development strategy is needed. The potential for the progression of an asset backed vehicle involving Stoke and/or Staffordshire County was raised as a possibility particularly in the current austere public funding climate.

Priority schemes

- 3.1.21 **Stoke Central Business District (CBD)** – AWM has invested over £7m in site assembly to facilitate the scheme and has worked closely with Stoke to progress the proposals including selection of Gnr8, the preferred developer. The rationale is based on addressing market failure in the provision of Grade A office space and alongside a package of other initiatives including new road infrastructure, east west precinct retail development, university quarter in order to regenerate and strengthen the role of the city centre in the sub region.
- 3.1.22 A series of studies supported the AWM investment with key findings being the poor office accommodation on offer, low rents, poor retail performance, lack of employment mix, poor levels of graduate retention etc. with recognition that a market needed to be created involving public sector investment in land assembly, pre let, gap funding etc. The likely rental for office space in Hanley is £16.50 sq ft which is not sufficient to make construction viable particularly without a pre let.
- 3.1.23 It was recognised that taking it forward will be a long term project given the demise of AWM and the lack of alternative public finance and in addition the potential competition from Keele, Newcastle, Etruria Valley/Festival Park. It was felt that there will need to be some prioritisation and direction from the LEP if the CBD is to be pursued.
- 3.1.24 **Chatterley Valley** – another flagship scheme for B1c, B2 and B8 uses. AWM secured outline consent for the whole site and other developers have built out part. The Peacock Hay site was proposed for hi tech manufacturing to house those companies restricted from going to Keele but is constrained as road infrastructure and substantial earthworks are required. It was recognised that the lack of public funding and the physical development constraints mean that the site may take some time to build out.

InStaffs

- 3.1.25 InStaffs (UK) Limited was set up in 1997 to provide a comprehensive service to businesses seeking to invest or re-invest in Staffordshire. In April 2010 InStaffs became part of the Development Services Directorate of Staffordshire County Council.

- 3.1.26 It was felt that 'low hanging fruit' sites have been consented and in part developed e.g. Festival Park, Chatterley Valley (though with ongoing constraints) and Pro Logis Park, Stoke. The offer was considered to be good though at Trentham Lakes, Pro Logis Park and Sideway.
- 3.1.27 It was felt that B8 development has been land hungry and there is a lack of good sites in public ownership for B1 development/Inward Investment. It was suggested that public funding if available might consider the acquisition of Sideway from Pro Logis and offer it as a B1 site.
- 3.1.28 It was felt that Chatterley Valley requires road infrastructure and this will be expensive and require a crossing of the West Coast Main Line (2 year timescale). Etruria Valley needs road infrastructure but this will impact on City Centre traffic envelope. The site at Sandyford accessed by the new bypass was thought to be a good site.
- 3.1.29 Mention was made of two large strategic sites outside Stoke boundary which would serve the needs and population of Stoke. The first site was at the former Indesit Works, Grindley Lane (100 acres) and InStaffs advised that JCB has shown some interest. The second site owned by St Modwen was at Blythe Vale in Staffs.
- 3.1.30 G Park Stoke the former Johnson Matthey site has just secured consent for 462,000 sq ft for distribution on 20 acres and was considered to be an excellent employment site. InStaffs felt that in Stoke there was a lack of quality small scale workshop schemes.
- 3.1.31 In Newcastle the industrial focus is at Chatterley Valley with focus on office for the town centre with a B1 (b) focus at Keele.

Keele Science Park (KSP)

- 3.1.32 Keele Science Park was opened in 1985 and aims to attract businesses in the healthcare; environment & environmental technology; ICT; high level executive recruitment; and research and design fields. It started out as a 'pure' science park, however this was found to be difficult to maintain, and increasingly marketing & recruitment firms have moved in. The stipulation remains that business must be 'high-end' and related to the University – hence recruitment is principally targeted at placing graduates into specialist roles (not just Keele, but all universities) and healthcare is the biggest sector, linked directly to the medical technology faculty at the University. KSP has actively turned away businesses such as call centres and leisure operators so as to maintain the Park's image.
- 3.1.33 The Science Park felt strongly that science parks such as Keele and comparable rivals in Manchester, York, Cambridge etc rarely host businesses that directly spin out of the universities – this is a common misconception. The links are more generic – there is onsite business support and behind this a vast range of research support offered by the University to KSP businesses. Often this research may not even be at Keele, but at other universities Keele is linked with – this wider network of academic expertise is

- what businesses seek, as well as a ready pool of skilled labour (again, often pulled from various universities).
- 3.1.34 The Park has four Innovation Centres (IC1, 2, 3 & 4) and a Medical Technology Centre, which have never fallen below 90% occupancy since each opened, even during the recession. Businesses have been hit by the downturn (especially recruitment), but generally the medical sector is quite recession-proof. About 500-650 employees work at KSP, with numbers always varying due to workloads and research projects.
- 3.1.35 The ICs are split into 75% office space; 15% workshop space (hi-tech space); 10% laboratories. Rents probably average around £15 per sq ft, but can reach a remarkable £35 per sq ft for lab space in the Med Tech Centre. Despite these rents there is so much support space, especially for med-tech industries, that some areas of the Park do not make much profit. KSP does not actively market other than through networking via the UK Science Park Association.
- 3.1.36 Keele University owns a 70 acre extension site for KSP, which will host: IC5, 6 and 7, a major 4* star hotel (due to apply for planning permission early 2011); 13 further development plots and about 32 acres of woodland. All road and utilities infrastructure is in place for these extensions and it is hoped that IC5 will be built within 18 months to 2 years, in conjunction with their development partner, Staffs County Council. The University also owns a further 120 acres adjoining this extension land, which is in the Green Belt – this is viewed as a longer-term growth zone, perhaps for residential growth too, however the University has no formalised plans as there is much to do before this land would ever be needed. KSP/University has no requirement for more land or any interest in building away from their existing facilities.
- 3.1.37 Keele University is self-contained and sits apart from the Stoke conurbation, both in terms of image and facilities. It was felt that KSP does not compete with Hanley or the kind of uses that would ever be located in a city centre. Science park users specifically look for high quality environments, renowned image, academic links and convenient access and parking to attract high earning staff – there is nowhere else in Staffordshire that remotely competes with Keele.
- 3.1.38 If KSP loses businesses (usually when they have outgrown the available space) they generally go to Manchester for the larger market, airport, larger university base (Keele has only 8,000 students in total), better image, and better city centre facilities. KSP understands that Manchester City Council had also been a leader in seeking high-speed digital links that for the foreseeable future North Staffs will not be able to compete with – a form of ‘future-proofing’ that KSP believes will see Manchester strengthen its offer over Stoke.
- 3.1.39 Poor educational achievement in Stoke was considered to represent a constraint to investment. For example Siemens, a key tenant on KSP (developing wind turbine technology), always look at the quality of secondary schools in an area when building manufacturing facilities, and have long since decided against investing in Stoke. Stoke

is viewed by KSP businesses as having far too weak an image for them to consider relocation.

Sectors

3.1.40 InStaffs briefly offered views on the area's key sectors:

- Environmental technologies - Comprises only Siemens and Converteam, a power conversion specialist which produces wind turbine component manufacturer at Kidsgrove. The company is planning to expand.
- Medical – Keele
- Ceramics – craft based, existing expertise, limited organic growth
- Business/Professional Services – No demand or enquiries for Hanley City Centre. Genr8's (Chelsfield/ex Amec JV) CBD plans. This potentially competes with Etruria Valley (and N U Lyme town centre). Newcastle under Lyme was felt to have a better image but no current offer.

Future priorities

3.1.41 It was felt that a lack of provision and choice of premises and availability of grow on space were the key issues. It was felt that Stoke firms have tended to adapt existing premises and felt that Stoke businesses tend to locate to Stafford, Newcastle and Keele but no statistics were available.

3.1.42 Stoke CC have several businesses centres, however, are of variable quality and do not offer a supported environment. They are in need of investment/improvement in terms of premises and support. A typical example is at Shelton Enterprise Centre. Stoke also runs the Hothouse in Longton which has been successful.

Staffordshire County Council

3.1.43 The County Council has recently procured a study into existing land and property markets of Staffordshire to help inform its Local Economic Assessment. Its key findings relevant to this ELR are set out below:

- The distribution sector has been the principal sector of growth in the take up of premises and employment land over the last 5 to 10 years. Much of this growth has been at the key nodal points on the motorway network, particularly Stoke and Newcastle.
- Predicted continuing growth in this sector, because of continuing restructuring in networks and deeper e-tailing and that Staffordshire will remain attractive due to its centrality and strong motorway connections.
- Growth in Staffordshire will be concentrated in the same locations as previously, if land can be made available. The availability of prime land in the hands of competent developers will be important to ensure that the County sees its fair share of investment and development in this sector.
- Assuming take up levels broadly continue at the same rate as previously this is likely to lead to shortages of employment land in Newcastle-under-Lyme amongst other areas and these same areas will witness pressure for demand, especially from the big B8 sector.
- The viability of town centre office development would appear to be very fragile. This is due principally to low prevailing rents, the lack of obvious development sites and the likely costs of development. The stock of unimplemented planning permissions for out of town offices is a further threat.
- Successful development of in town offices will require the harmonisation of other in town centre redevelopment and regeneration, the removal of some development constraints on particular sites, and a certain article of faith.
- The interrelationship between retail, offices and other uses (e.g leisure and housing) in making town centres more vibrant and viable places cannot be over emphasised.
- Keele Science Park has been successful in providing a platform for high tech business. Qualitatively, the Science Park is deficient in who and what it can accommodate in terms of larger scale manufacturing and associated distribution activities. To attract and retain these types of companies, a satellite site is required. Such a satellite site would need to be located close to the motorway junction and be highly prominent.
- The managed centres of the County Council would seem to perform an important role, particularly in offering accommodation to starting companies
- It is clear that there will be a much greater onus on Staffordshire County Council, and all Local Authorities, to sweat their property assets to assist regeneration.
- Newcastle-under-Lyme has a reasonable supply of employment land, but there is a question mark on its true deliverability. Moreover, its supply would appear to be thin in terms of meeting recent take up rates, particularly in the big B8 sector.

- 3.1.44 Discussion with economic development contacts at the County are summarised below.
- 3.1.45 Historically the County has supported Newcastle in particular in provision of several business centres for start ups and SME's and at Lymedale Business Park and Silverdale Enterprise Park. It has historically successfully leveraged regeneration funding from European and RDA sources. At Lymedale the County has worked well with Gladman and this developer was instrumental in delivering built development initially on a speculative basis.
- 3.1.46 The County concur with the view that there is now a shortage of employment land in Newcastle and that there will be a medium to longer term need to look at larger sized sites probably greenfield close to the A500/A34 and that the market would react favourably to this. Keele was considered to be a niche offer and not competing with other locations. Growth on employment space was felt to be in scarce supply.
- 3.1.47 For Stoke the view was held that attractive sites are available at Sideway, Trentham Lakes and Chatterley Valley although the latter seems to be isolated and poorly signposted.
- 3.1.48 In Stoke, away from the A500 and A50 it was felt that historic employment sites served only a local need offering cheaper locations and second hand stock. Overall it was felt that image, concentration and scale of dereliction and environmental quality inhibited investment in new premises. It was felt that Newcastle and its town centre in particular had better environmental quality and that office proposals would be supported but that proposals for offices in Stoke's CBD would be difficult to fulfill due to lack of existing office core, facilities, access etc.
- 3.1.49 The County would consider entering into partnership arrangements to facilitate new development subject to identifying land and the appropriate mechanism and partner etc.

Stoke on Trent Economic Development Department

- 3.1.50 It was recognised that in recent years there has been a lack of a fully joined up strategy, promotion and delivery in respect of economic development. The response to development interest has been more reactive with no strategic system of dealing with inward investment enquiries other than dealing with InStaffs on a case by case basis.
- 3.1.51 In terms of a coherent hierarchy of employment sites in Stoke there has tended over previous years to be a planning led database of sites identified for employment purposes. At present there are a total of 961 potential development sites on the council's database. Every site identified in the spreadsheet has received previous developer interest, is an expired allocation or has / had planning permission.
- 3.1.52 A sites/premises asset review has recently been completed and a new bespoke database is being established which will be on line and offer site/property search functions. A new website is also a step forward – www.makeitstokeontrent.co.uk.

- 3.1.53 In terms of threats to economic well-being a clear issue is the public sector fiscal squeeze. It is anticipated that 13,000 job losses expected in N. Staffs over the next 5 years. This forecast is beginning to show in recent job losses announced within the council. The City Council recently announced plans to cut more than 700 jobs as it faces making potential savings of £33m.
- 3.1.54 In terms of road infrastructure apart from the A50 and A500, there are no main roads located within the city, which means many sites are constrained due to their accessibility. Ground stability is a recurring issue throughout Stoke-on-Trent due to previous mining activity that has taken place.
- 3.1.55 In policy terms the key aim of the LDF core strategy is to develop the urban core as a priority before sites located on the outskirts of the city. There is some duplication between housing and employment sites that are being considered as part of the LDF. The authority is in the process of producing a Local Economic Assessment (duty arising under the Local Democracy, Economic Development and Construction Act) but this has yet to report.
- 3.1.56 Two other large potential employment land sites are located in local authorities adjacent to the City of Stoke-on-Trent:
- the former Indesit factory located in Stafford Borough
 - site located in Blythe Bridge (Greenfield land with planning permission for B1 and B2 uses), which is in Staffordshire Moorlands LA.
- 3.1.57 The following sites were identified as representing the most attractive sites in the local authority's area:
- Etruria Valley area**
- Part of area was formerly a sewage works and a dumping ground.
 - Road access is major barrier to developing the area as access to primary road network would need to be over railway.
 - Any new scheme would have to fund a new bridge and junction improvements at A500
 - Small sections of area are being developed as and when required.
- Chatterley Valley Area**
- There is likely to be a need for a new roundabout around the sites at Chatterley Valley, which would present a deliverability issue.
 - However there is interest in development at these sites. Some sites in the area have got planning permission, which have been extended.

Sideway

- Site is a sizeable development opportunity for a B8 led warehousing scheme

Festival Park sites

- Sites understood to be owned by St Modwen – 21.7 acres capable of development without the need for significant highway infrastructure.

Next to Longton Tesco

- Permission granted for retail on part of site and B2/B8 on remainder

Stoke Station Sidings

- Site partially occupied by network rail buildings and currently being used as a car park for the railway station.

Various of sites in and around Hanley City Centre

- Central Business District – a key priority in planning policy terms. The Council and their partners, Genr8, plan 50,000 sq m of new development, predominantly offices but with a 250-bed hotel as well as shops, cafes and bars. This development is set to start in 2012 with work continuing over the next 10 to 15 years.
- Sites are detailed within the relevant area action plan prepared by City Council
- Tesco has completed its new food store south of City Centre and new dual carriageway, which improves the accessibility of the site.

Cookson Mathey Site, Meir (aka G Park, Stoke)

- Key site owned by Gazeley
- A number of other large warehouse sites located within the area.
- Close to primary road network (A50).

Sites at Sandyford Bypass

- Good access to the sites has been provided by the new dual carriageway developed in the area.

3.1.58 The following sectors have historically been identified as offering economic growth potential:

- Environmental technologies – a low carbon study is ongoing
- Medical/Health care – Keele obviously. Study ongoing
- Creative Industries – not obvious but potential to build on BBC relocation

- Logistics – contribution recognised but desire to diversify business base.
- Ceramics – The sector has shown recent growth and success – Wedgewood back in profit and returning elements of manufacturing back to Stoke from Malaysia; Wades recent new ceramic facility at Festival Park; Growth also at Steelite International and Dudsons with strong exports. The ceramic supply chain is also mature.
- Business/Professional Services – no obvious business park offer. CBD is a priority.

Newcastle under Lyme Borough Council Economic Development

- 3.1.59 The borough has been successful in recent years in securing investment in new sites and premises particularly in transport and logistics at Chatterley Valley, Keele Science Park, Lymedale Cross and Lymedale Business Park.
- 3.1.60 Over 60 hectares of employment land has been built on over the past 5 years and that this scale of development means that there is only a modest land requirement left until 2026. Perhaps the more pressing issue is the apparent lack of deliverable, viable, quality employment sites in the borough.
- 3.1.61 The council is targeting new office development towards Newcastle Town Centre and has developed a Supplementary Planning Document to support this ambition. Several locations have been identified as development opportunities for a range of uses including offices. The target for both Newcastle and Hanley is to create an attractive offer for attracting office development.
- 3.1.62 A key issue for the Borough is that many sites that could potentially come forward have constraints that would prove difficult in terms of deliverability.
- 3.1.63 Additional issues for the Borough were identified:
- The need to reduce the length of commuting
 - The need to make areas and sites within the borough more appealing as business locations.
- 3.1.64 The following sites were identified as representing the most attractive sites in the local authority's area:

Chatterley Valley and Peacock Hay site

- Site N983 Lowland Plot is the remaining Phase 1 land, measures 6.52 hectares and is suitable for B8 use.
- Additional land towards the north west of the site (known as Peacock Hay – site N1468) has been taken out of the Green Belt and was considered to be suitable for B1a, b and c uses. According to the Council it is likely that abnormal infrastructure costs of over £10 Million would be required to bring further development forward on

the site. The Council has strong concerns that the site will not come forward without significant public funding and consider that it is unlikely that the private sector will be able to fund the necessary infrastructure, remediation and levelling works that the site requires.

- Other sites that could be brought forward around Chatterley Valley are likely to be within the Green Belt.

Lymedale Business Park/Lymedale Cross

- A successful business park development that has taken place within the borough.
- Nearby development land also exists at the former British Gas site however a lack of main road frontage reduces visibility and access.
- Phase 4 of Lymedale Business Park could potentially be the Speedway stadium although this remains in operation.

Keele Science Park

- Phase 1 Complete, Phase 2 almost complete.
- Phase 3 is fully serviced and ready
- Science park would not be able to contribute to general B1 and B2 uses as employment use is restricted to uses as a Science Park.
- A key target is to make Keele University and Science Park a 'visible' part of North Staffordshire.
- Any Green Belt release to extend the Science Park would have to be under the presumption that it would only be used for employment uses that would be in the same category as current uses on the Park

Land on outskirts of the town available for development, potentially for office use:

- Ryecroft
- Nelsons Place – Office development supported. Site is in council ownership and is well located in terms of accessibility.
- Blackfriars Bakery – Council currently in discussions about this site and its potential future use.
- Georgia Pacific site

3.1.65 The Council questioned the appropriateness in market and planning terms of relying on the Blythe Vale site to serve the Stoke and Newcastle area. This site was according

to the council selected as an inward investment site and has remained undeveloped for over 10 years. The existing B1 and B2 consent conflicts with the Core Spatial Strategy of directing office uses to Hanley City and Newcastle town centres.

3.2 Engaging the Commercial Property Market

Introduction

- 3.2.1 An Employment Land Review forms the basis of site and sectoral knowledge of inward investment agencies and economic development departments – businesses know this and know that if the base information is weak, the quality of advice will invariably be comprised, hence it is critical that the private sector is engaged from the start of the process.
- 3.2.2 This analysis of the Stoke and Newcastle commercial property market supports the overview provided by the study team's local commercial agents, Butters John Bee, and has been informed through tapping into the strategic market knowledge of leading national commercial property agencies; and consultations and structured meetings with notable players in the regional and sub-regional development and investment sectors. These firms are all also deeply involved in the management and promotion of business premises and land across the City Region.
- 3.2.3 The purpose of this assessment of the commercial property market is to derive a realistic but far sighted view of demand potential, establishing with consultees the present picture, not only in the Stoke and Newcastle area but also national trends that influence development; and the extent to which market dynamics can be improved through, amongst other things, investment in infrastructure, achieving critical mass and focused/collaborative marketing.

Who we consulted

- 3.2.4 Respondents have generally been keen to be involved and forthright in their views, often spurred by the recent tough economic climate to be more proactive on seeking public/private partnerships and greater strategic co-ordination to reduce the likelihood of enduring such a severe and immediate rebalancing of the market in the future.
- 3.2.5 Specific comments are, for reasons of commercial and personal sensitivity, not attributed to respondents; rather key issues that arose on regular occasions and were promoted with the greatest vehemence are focused upon and faithfully represented. The following firms were consulted:

ProLogis

- 3.2.6 ProLogis is a leading provider of industrial and distribution buildings in the UK. Working with retailers, manufacturers and third party logistics operators the company owns and manages 20 million square feet of industrial space in prime locations across the country. ProLogis has two sites in Stoke-on-Trent, the 60-acre ProLogis Park and 35-acre ProLogis Sideway.

Gazeley

- 3.2.7 Gazeley is part of the Dubai-based Economic Zones World (EZW), a global provider of sustainable industrial and logistics infrastructure solutions. Gazeley's interests in North Staffordshire include the 380,000 sq ft Blue Planet building for B8 distribution uses at Chatterley Valley; an adjoining 7.67 acre plot with planning consent for B1 and B2 uses; and the 19.5 acre Meir Park site in Stoke, recently granted planning permission for up to 462,000 sq ft of B8 uses.

St Modwen

- 3.2.8 St Modwen is a market leader in the large-scale renewal of brownfield land, operating in all sectors of the property industry across the UK. St Modwen has extensive land holdings across North Staffordshire, and a long track record of involvement in the area, having been selected to redevelop the Garden Festival site in 1987. A joint venture (Stoke-on-Trent Regeneration Ltd) was subsequently formed with Stoke City Council and acquired over 900 acres of brownfield sites including Etruria Valley, Berry Hill and Trentham Lakes. St Modwen has no current interests in Newcastle-under-Lyme, but does own major potential employment sites beyond the conurbation boundary including Meaford Power Station and Blythe Vale Works. The Regional Director and consultee at St Modwen, Mr. Mike Herbert, is also the current President of the North Staffordshire Chamber of Commerce and gave views from both perspectives.

Gladman Developments

- 3.2.9 Gladman is one of the UK's largest speculative developers of office and industrial accommodation. Gladman has a long history of working in North Staffordshire, developments including: 60 acres at Lymedale Business Park having purchased land off Staffordshire County Council; a 700,000 sq ft speculative warehouse unit in Meir; and 80,000 sq ft speculative office development in Hanley. Gladman also developed Staffordshire Technology Park in Stafford, the largest business park between Manchester and Birmingham.

Langtree Group Plc

- 3.2.10 Langtree owns and manages a diverse property portfolio across the North and Midlands. They offer a range of commercial space for sale and to let, aimed at all size businesses from start-ups to multinationals. Within Newcastle and Stoke Langtree (through its joint venture companies) has five developments: 3 industrial units at High Carr Point; 10 units on Century Road on High Carr Business Park; nineteen workspace units at High Carr Network Centre; 25 workspace units at Fenton Industrial Estate and 90,000 sq ft of industrial space at City Park Trading Estate in Fenton.

Northern Trust Ltd

- 3.2.11 Northern Trust is one of the UK's largest privately owned property investment and development companies. It has a portfolio of over eight million sq ft of industrial/trade and office parks, and more than 5,000 acres of land, throughout the UK. Northern

Trust acquired Federation Road Business Park in 2001, a small estate of six units ranging from 4,500 sq ft to 6,200 sq ft; and also developed North Staffordshire Business Park – a seventeen unit development recently completed at Chatterley Valley; and the Genesis Centre, a modern serviced office building aimed at SMEs.

Commercial agents

- 3.2.12 Further to the comprehensive local market conditions review from the study team's Stoke-based commercial agents (Butters John Bee, see section 2.3), two major national commercial agents, Jones Lang LaSalle and King Sturge, were consulted. Both firms have large Birmingham and Manchester based office, investment and industrial agency teams who work for a range of businesses of all sizes across North Staffordshire and therefore provide a complementary perspective to the six developers/investors consulted.

General Market Views

- 3.2.13 The majority of respondents are not looking to expand the land portfolios or to develop new space at the present time. Some are still seeking to downscale their holdings. The 2008/09 period was widely viewed as the toughest economic period for decades, and whilst most report evidence of recovery it was widely estimated to be 18 mths/2 years+ before speculative development begins to occur regularly and even then it will be more likely in the stronger national markets.
- 3.2.14 The private sector views Stoke as a secondary or more commonly as a tertiary location in national terms – with the view being that economic growth begins in London/M25 corridor, spreads to areas such as the Golden Triangle for logistics (the commercial market's name for the area between Coventry, Northampton and Leicester that typically represents the ideal logistics location in the UK); and into the Birmingham and Manchester city centre office markets, before the need for cheaper space means the market explores options in Stoke. Stoke is viewed as competing with centres such as Wolverhampton, Crewe and Derby.
- 3.2.15 The logistics market has consistently outperformed manufacturing in most areas for over 15 years, and is widely anticipated to keep doing so, though specialist sectors of manufacturing will always flourish. The private sector respondents see the logistics sector increasingly moving towards smaller, closer to conurbation units ('just-in-time' models), with increasing labour intensity.
- 3.2.16 Views were mixed on employment densities in logistics, with some suggesting the typical view of 1 employee per 1,000 sq ft was falling to levels closer to 1 per 600 sq ft, as the logistics sector becomes more complex and competitive – an example provided being Amazon, a major logistics-based employer whose response to ever more demanding customers seeking faster delivery is to print books to order in-house rather than stockpile (space inefficient) or order in (time inefficient). Such processes mean a more diverse range of skills are increasingly being required by logistics operators.

- 3.2.17 The office market has been very weak in recent years and speculative development is highly unlikely in any location at present. The market view is that most interest in office space is for out-of-town business park space, with convenient parking, accessibility to high-quality residential areas, and an attractive working environment being the true drivers of attracting and retaining workers. Certain users will always want city centre locations – these tend to divide into the image conscious (professional/financial services), who may pay high rents for city centre locations with a quality leisure/retail offer (Manchester/Leeds/Birmingham) and support functions (secretarial/admin services) who seek locations accessible by public transport, with some retail offer, and therefore convenient and attractive for a large pool of mid-skilled workers with varying degrees of mobility.

Stoke & Newcastle: Areas Strengths and Weaknesses

- 3.2.18 There was relatively little differentiation between Stoke and Newcastle from the private sector – they are generally seen as one coterminous area. One of the most notable elements of the feedback from every respondent was the high regard the area's workforce is held: it was described variously and often repeatedly as 'loyal'; 'non-militant'; 'hard-working'; and 'value for money'.
- 3.2.19 Some concern was expressed over a localised mentality wherein people were uncomfortable about travelling for employment even between the six towns of Stoke and/or Newcastle, however generally; and particularly for the specific purposes of manufacturing and logistics/distribution; the workforce was regarded as one of the conurbation's key assets.
- 3.2.20 Conversely concern was expressed from many parties about the state of secondary and further education, particularly in Stoke, and to a lesser degree across the wider conurbation. Examples were provided of specific major employers choosing not to locate in Stoke due to concerns over the emerging skill-base of the younger elements of the workforce.
- 3.2.21 Typically discussions of Stoke and Newcastle's strengths and weaknesses gave rise to issues that were simultaneously positive and negative – for example, the area's strategic location midway between Manchester and Birmingham was widely seen as being key to its growth as a logistics hub; but also a key reason why it will never be able to develop a high-end city centre office quarter when these two cities dominate this market to the north and south respectively.
- 3.2.22 Locally transport links were seen as strong, with the rail line, two M6 motorway junctions, A500 and A50 being widely regarded as the principal drivers of future economic development – no respondent felt that any significant major employment use outside of a unique offer such as Keele Science Park could ever succeed away from these arteries – with some recognising that this meant large areas of the conurbation were very isolated from employment growth as lower-level road networks are generally regarded as poor.

- 3.2.23 Respondents generally felt that workshop units were generally popular even in the current market (typically up to 3,000 sq ft.), but for larger units there is a very limited demand. Rental levels for industrial had been static for a number of years, and were reported as being around the £4 - £4.50 range, occasionally £5-£5.50 for modern units, yet construction costs have risen. Land values have to be low or public sector assistance is required. With no speculative building occurring, to be able to capture tenants, sites have to be cleaned up, serviced and accessed, i.e. sites have to be oven ready. It was noted that Staffordshire County Council units could often afford to undercut the market, making development viability more problematic for the private sector.

Views on Public Sector Policies and Actions

- 3.2.24 There was repeated and widespread scepticism from most respondents over the apparent focus on Hanley for office growth, particularly aimed at North Staffordshire Regeneration Partnership; and to a lesser degree Stoke City Council and Advantage West Midlands. There was no support for marketing Hanley as an office destination and generally little confidence that anything substantial would ever be delivered.
- 3.2.25 The reasons put forward for this included, in no specific order: the far superior office offer of Manchester and Birmingham (which in both cases has examples of high quality space being let at very competitive rates presently; and a large quantity of supply); the correspondingly stronger image of these cities as office locations; the need for office development in Hanley to be driven by public sector pre-lets which were increasingly unlikely to occur in the current economic climate; the lack of a quality retail and leisure offer in Hanley; the cost of acquiring and developing sites and the consequent need for substantial public sector funding; the 'horse has bolted' mentality that has long been held by Stoke businesses since Festival Park opened and businesses left the city centre; and the generally tough development market making new-build virtually impossible in any location.
- 3.2.26 Most respondents firmly believe that the major proposed schemes for Hanley (office, leisure and retail) will not be delivered in the foreseeable future – there was also a very passionately held view from all types of respondents that certain areas across the conurbation had 'lost out' due to the focus on Hanley in an era when greater commercial growth could have been forthcoming if better strategic thinking had been applied.
- 3.2.27 There was a commonly held view, especially by those not based in North Staffordshire that the area would benefit from Newcastle and Stoke being a single authority. Developers seek simplicity, and examples were put forward – e.g. Chatterley Valley – where interested parties need to liaise with a unitary authority, a local authority, a county, the Highways Agency, and previously an RDA and a Regeneration Partnership, to thoroughly understand the area's funding and policy regimes. This proves highly inefficient especially compared to other authorities who have proved more effective in co-ordinating all relevant public agencies in advance of being approached by developers.

Supply of Sites

- 3.2.28 A number of notable employment sites, existing and potential, figured in discussions – a summary of each is provided below.
- 3.2.29 **Festival Park and Etruria Valley:** St Modwen expressed the view that 150,000-200,000 sq ft of office development can be accommodated at Etruria Valley, and that this offers a stronger location for such uses than Hanley. Respondents generally concurred with this view, on the basis that Festival Park had already precipitated the move away from the city centre many years ago and Etruria Valley was the natural extension of this, though recognising the recent policy rationale behind supporting Hanley as the principal office location.
- 3.2.30 **Berry Hill area:** This cluster of employment allocations in Fenton suffer from a lack of strategic accessibility, both in the view of the principal landowner (St Modwen) and other consultees. Given local and national economic challenges in funding infrastructure it was generally felt that other sites (Blythe Vale, former Creda/Indesit site, Chatterley Valley, Etruria Valley, Sideway) would all be developed before this area.
- 3.2.31 **Chatterley Valley:** Widely seen as a key element of the conurbation's employment offer, Chatterley received very mixed views in terms of its commercial potential. Technical issues regarding topography and land ownership were seen as likely to undermine delivery, however a 'give-it-time' mentality also arose from many discussions with developers keen to emphasise that most successful developments in terms of occupancy and employment numbers (such as Lymedale, Stafford Technology Park, Festival Park) typically take seven or more years from initial opening to become recognised business hubs. Gazeley, developer of the notably vacant Blue Planet building at Chatterley, ascribed the building's letting problems to bad market timing (it came on-stream in 2008). Other respondents suggested the North Staffordshire market was generally not well-developed enough to sustain high-quality/high rent environmentally friendly premises even prior to 2008 and was still primarily focused at providing competitive land and labour values to outdo competitors.
- 3.2.32 **Trentham Lakes, ProLogis Sideway:** Understandably viewed favourably by their respective owners, St Modwen and ProLogis, these sites were widely recognised by other respondents as offering the best 'oven-ready' general use employment sites in Stoke at present, and the key reason for the belief that the short to medium term supply is catered for.
- 3.2.33 **Keele Science Park:** Viewed by all as a unique offer that did not compete with other sites in North Staffordshire, but there was little external knowledge of what was proposed at Keele or how it could link into the conurbation's growth.

External (non-Stoke or Newcastle sites)

- 3.2.34 **Blythe Bridge site and former Indesit Works:** Numerous consultees noted that the Blythe Bridge site which falls under Staffordshire Moorlands administration served the

Stoke conurbation and was, in commercial terms, a 'Stoke site'. There were occasional comments that the A50 corridor had so far been under-utilised for employment growth, and that this Greenfield site was the next natural project to go forward when the economic recovery gains momentum. The greater simplicity of developing the site made it preferable to the proximate former Indesit works on Grindley Lane, which falls within Stafford Borough. There was unanimous feedback on the belief that administrative boundaries should not alter the recognition that both sites will serve the conurbation, specifically Stoke, in employment terms.

- 3.2.35 **Basford East & West:** ProLogis stated it has ownership of 200 acres at Basford East, part of the Basford offer at Crewe long recognised as Strategic Regional Site by the North West Development Agency. Basford West will come forward first, and another developer, Goodman, owns 90 acres which has planning permission for 1.8 million sq ft of new development. All respondents believe that Crewe and Stoke operate in the same market area from an inward investment perspective and some believe Basford will directly tap into North Staffordshire's labour pool as well as negatively impacting on the conurbation's attractiveness to external business.

The Logistics Issue and Other Growth Sectors

- 3.2.36 There is general agreement on how the conurbation's economy has developed in recent decades – ten to twenty years ago, the area was suffering with closures in the ceramics, steel and coal industries. At that time the logistics sector was going through major changes: warehouses were being consolidated, existing business was looking for more efficient space by going high and major expansion in retailing, especially food stores, was demanding new warehouse space close to markets on sites with good communications. The Stoke & Newcastle area was well placed to capitalise on these trends with large sites, motorway corridor location and labour pool that was viewed as cost effective and flexible in terms of basic re-skilling.
- 3.2.37 Coupled with an investment boom with funds that had been going into equities, bonds etc being channeled into property this resulted in significant amounts of speculative development, which in turn fuelled more demand. Eventually this resulted in an over-supply which is only slowly being taken up and this has led to a reaction against logistics and a fear that the conurbation has become too dependent on one sector once again; and that logistic and distribution growth has filled prime employment sites that could have hosted higher value uses that would have allowed Stoke and Newcastle to more effectively benefit from the economic boom of 2000 - 2007.
- 3.2.38 There was no support though for the view that Stoke and Newcastle are too dependent on the logistics sector. Many respondents agreed that there was a traditional lack of certain types of non-logistics focused employment space (notably accessible and well-landscaped business parks) but that the employment generated by the logistics sector has been beneficial to the area in that it generally outperforms manufacturing in salary terms and that other growth sectors (ICT, professional services, healthcare) would not have seen Stoke as a realistic destination. Market commentary now suggests that labour now accounts for up to 50% of warehouse

running costs. It is anticipated that logistics will become increasingly retailer-led, which will mean a need for more flexible and bespoke premises, generally with smaller floorplates than development seen in the past 10/15 years.

- 3.2.39 Ambitions to target recognised growth sectors such as medical technology/healthcare and environmental technologies were viewed with some scepticism on the basis that other areas in the UK offer far greater existing clusters to build upon. A belief existed that the conurbation's more desirable residential areas (e.g. Keele, Trentham) could benefit from being separated in image terms from Stoke and could act as drivers of higher-value niche sectoral growth – as these sectors (as re-affirmed by discussions with Keele Science Park) tend to actively seek non-city uses and areas of high environmental, residential and retail/leisure quality to succeed.

Future Land Requirements

- 3.2.40 The canvassing of private sector opinion did not provide definitive agreement on future land requirements for Stoke and Newcastle. Whilst all concurred that there is no short-term, or indeed likely medium-term (5-10 year), shortage of employment land in terms of quantity, some raised concerns over the suitability of available sites. For the longer-term there was a general view (strongly held by some respondents) that the conurbation would need one or more significant (i.e. over 300 acres) new employment sites, which would need to be situated in close proximity to one of the major road arteries, ideally near the M6 junctions.
- 3.2.41 Business is very positive over the opportunities offered by brownfield land as remediation costs can offset land acquisition costs, however there was concern that Stoke (specifically) had tried to promote former pottery sites and other small manufacturing sites for employment use that will never interest the market. Brownfield or Greenfield was not the key issue – what matters is accessibility and scale.

Further Comments

- 3.2.42 A few respondents expressed concern that the ELR boundary – determined by the administrative boundaries of Stoke and Newcastle – did not encompass the 'true' market area of North Staffordshire. This market area was generally depicted as including Leek, Crewe and even in one instance stretching to Middlewich in Cheshire – i.e. any developer/occupier would consider any of these locations to be effectively the same in terms of strategic locational decision making. Many of the private sector respondents – and indeed Keele Science Park in subsequent discussions – noted that the Basford West and East employment sites in Crewe represented the greatest long-term challenge to the Stoke/Newcastle conurbation.

3.3 A local commercial property agent's perspective from Butters John Bee

- 3.3.1 There has been a significant reduction in enquiries and in developer activity in the last two and half years. Another key factor has been the shift from the demand for freehold

- employment properties back to rental properties. In the build up to 2007 the commercial property sector (off the back of the property boom) had seen significant demand for freehold properties. Due to the availability of readily accessible finance at cheap rates, businesses were keen to acquire premises. Invariably, properties would be acquired by the individual pension funds of the owners of the relevant company. The property would then be leased back to the company thus providing an income to the pension fund. Although there has been limited market activity for freehold commercial property since 2007, the majority of transactions tend to involve owner/occupiers rather than investors.
- 3.3.2 Since the property crash we have witnessed a shift back towards rental property as funding for commercial acquisitions via the funding institutions has dried up. We have seen a proliferation of commercial premises being made available by Receivers for sale following the intervention of the banks where businesses have failed to meet mortgage and loan repayments. These Receivership sales tend to achieve sale figures which are a fraction of the prices being paid for these assets during 2005 to 2007.
- 3.3.3 During the property boom there was not a noticeable uplift on rental values in the industrial and office sectors in North Staffordshire. The growth in the market was evidenced in freehold values following a compression on yields. However, since 2007 we have experienced a significant drop in rental values of circa 25% to 30% in the commercial sectors. Freehold values of development sites for commercial uses have dropped by even greater levels although it has been extremely difficult to report on recent transactions as there has been virtually no market activity in this sector since 2008.
- 3.3.4 Although the industrial sector has obviously been adversely affected by the downturn, it has performed better than the office sector. The second hand office sector, particularly in secondary locations has fared badly in recent years. Demand for the office sector has largely been concentrated on modern premises which are Disability Discrimination Act compliant and invariably for smaller floor areas of say 300 square metres or less. This demand tends to be concentrated on the prime office sector locations in Stoke on Trent which are currently Festival Park/Etruria Valley and Trentham Lakes.
- 3.3.5 Stoke on Trent and Newcastle under Lyme has never had a strong speculative build sector largely due to tight profit margins and limited demand. Even in the higher demand areas such as Etruria Valley there is currently a reluctance to contemplate speculative build when margins are getting even tighter on industrial and office sector developments. Despite developer reluctance to provide new floor space, agents are reporting that the strongest demand locally for new accommodation in the better locations is for trade counter uses and small scale offices. We are advised the Northern Trust scheme at Chatterley Valley known as "Genesis" where serviced offices and small industrial units are provided is now performing well.
- 3.3.6 As stated above, Chatterley Valley is now starting to perform (apart from the fact Blue Planet still awaits an occupier). However, it is acknowledged by local agents that it

takes several years for key employment sites to establish themselves and to create demand from employers. For instance, Festival Park was established following the National Garden Festival of 1986 but it was several years later before Festival Park became the location of choice for the larger locally based professional practices. The same scenario applied to Trentham Lakes where the first development took place in the mid 1990's but it took until the mid 2000's for the bulk of the current occupiers to arrive, in particular the more recent proliferation of car dealerships.

- 3.3.7 Festival Park/Etruria Valley is already of significant local importance from an employment perspective but it is concerning that the future expansion of the site maybe threatened by prohibitive infrastructure costs. It is likely this location cannot expand significantly without the need to provide a new junction off the A500. This is unfortunate bearing in mind there appears to be a genuine desire for employers to move onto this site even in the current fragile market.
- 3.3.8 Two potential, sizeable employment sites for the southern area of the region are actually located just outside of the City boundary and are controlled by adjoining Local Authorities. These sites are:
- St Modwen-controlled Blythe Vale Business Park which has an initial phase of 14.50 acres available, with a potential extension that would increase the size of the site to 117 acres. Planning permission was granted for B1 & B2 uses in 2002 on the entire site and this permission was subsequently refreshed after no development took place. An Access Road (covering the initial phase of 14.50 acres) reserved matters application was also approved on the site in 2007. Staffordshire Moorlands has currently set no timescales for redeveloping Blythe Vale, but will continue to support its current status in future land use policy documents.
 - The nearby Indesit/Creda site situated off Grindley Lane at Meir Heath of circa 100 acres. Planning permission was granted under 08/09751/COU to use the premises for a mix of B1, B2 and B8 uses although this permission has not been implemented and limits the use of the existing premises to the manufacture of household electrical items. Stafford Borough Council has stated that it would wish to see the site remain in employment use.
- 3.3.9 Although it is inevitable that the majority of employees who will be employed on these future employment sites will be residents of Stoke-on-Trent it is concerning that the City Council will not be in a position to directly influence the progress of these key development sites.
- 3.3.10 It is noted that Berryhill is identified as a potential key employment site. However, accessibility is a major constraint in bringing this area forward for development. This area was originally intended to be opened up for development via the construction of the proposed Hanley-Bentilee Link Road. However, it is believed the construction of this road has now been removed from the Local Transportation Policy as a major

- objective. Failure to resolve these significant infrastructure issues threatens to hold back the creation of more centrally located employment sites in the City.
- 3.3.11 There are lessons to be learned from previous developments to ensure only the most accessible sites are brought forward for future employment development. For instance, Fenton Industrial Estate located off Victoria Road experienced significant expansion during the 1970s and 1980s. However, in more recent years, failure to address access constraints into and out of the site at its junction with Victoria Road has resulted in a noticeable decline in demand for this location from employers. Congestion in this location at peak times impacts on the perception of this Estate for both employers and employees.
- 3.3.12 Probably the most challenging issue for the Council in Stoke on Trent from an employment perspective is how to accommodate large scale office development on sites with good access provision whilst delivering the proposed Central Business District site located in the City Centre.
- 3.3.13 The aspirational policy of creating a City Centre located professional office sector in a location where such a sector is virtually non-existent at present has been made all the more difficult following the economic downturn. The Council and its regeneration partners have made it clear the Central Business District (CBD) is a long term objective. However, it is important to ensure such an aspirational policy is also a realistic policy bearing in mind potential alternative development opportunities may have to be foregone in the hope the CBD ultimately comes forward for development.
- 3.3.14 Office rents at Festival Park remain static at around £12 to £13 per square foot. However, it is inevitable that asking rents in the CBD will need to be higher than this to cover development costs. Competition from competing sites to the CBD will also no doubt have the additional advantage of being able to provide car parking provision within the rents quoted above whereas car parking to serve the CBD will be at a premium bearing in mind the project's City Centre location. It is therefore likely that once demand for new office space returns to the market the CBD will continue to face stiff competition from the likes of Etruria Valley.

3.4 Comparison with Competitor Locations

- 3.4.1 There are many limitations of comparing the employment markets of urban areas as each one is of course unique in terms of geography and demography – however economic development is innately a competitive process and as such understanding the offer of potential competitors is important. In market terms few developers or investors see much difference between Stoke and Newcastle – they are viewed as an inter-dependent economic entity. Indeed market engagement for this study often indicated that the larger national or international industrial and office developers see the conurbation as part of an even larger sub-regional market, including most of North Staffordshire and parts of South Cheshire, including Crewe.

- 3.4.2 Therefore it can be seen that scale of the developer or investor considered alters the perception of the market area – a small indigenous firm in Stoke will recognise significant differences between localities in Stoke alone, and see Newcastle or particularly Crewe as entirely different marketplaces. As the respective authorities of Stoke and Newcastle are generally well attuned to their localities the focus of this comparative analysis is on the sub-regional markets beyond North Staffordshire and South Cheshire that were considered to be the principal rivals to the area by a majority of consultees – namely Derby and Wolverhampton. Assuming that London and the Thames Valley is the top tier location in the UK for commercial development, it is widely accepted that the principal regional centres such as Manchester, Birmingham and Nottingham represent the second tier.
- 3.4.3 Stoke/Newcastle is viewed as the third tier – a sub-regionally important centre – with Derby and Wolverhampton are considered to be at a similar level and given their locations, natural competitors. Appendix 5 provides a detailed review of the respective offer and recent performance of these locations to understand the broader context Stoke and Newcastle are working within. A summary of this review is set out below.

Summary of employment land provision in Derby and Wolverhampton

- 3.4.4 At the headline level it would appear that Wolverhampton has more available employment land than Derby, but demand is weaker. Certainly empirical evidence and agent's views confirm that Derby can command higher rents. Whilst both are seen as being overshadowed to a degree by larger neighbours (Birmingham and Nottingham) the impact is far lower on Derby which still operates as a relatively independent market entity.
- 3.4.5 A common theme recurring in Derby and Wolverhampton, as noted in market engagement regarding Stoke and Newcastle, is a move toward motorways, both in actual allocation terms and in the desire of the market generally. The importance of the M1 and M54 to Derby and Wolverhampton respectively cannot be overstated, and both authorities are targeting significant employment growth close to the motorways or at the very least on the 'motorway-side' of the city centres.
- 3.4.6 Both cities have a physical legacy of a manufacturing past – indeed both still have high percentages of their workforce engaged in manufacturing relative to England-wide levels – though Derby has seemingly been more effective in redeveloping brownfield land and offering a stronger new product to the market. Neither has found an effective method of dealing with a growing legacy of low quality secondary stock, including significant amounts of city centre office development. It is notable that Derby Cityscape, the Urban Regeneration Company that existed from 2003-2010, has been credited with encouraging some major office developers into the city and some key schemes such as Wilson Bowden's 95,000 sq ft of Grade A office space at Number One Cathedral Green have strengthened the city's offer, but it still is at best viewed ambivalently as an office destination.

- 3.4.7 Derby's ELR concluded that: 'the public sector needs to facilitate economic growth by enabling an appropriate range of sites and premises. A balanced land and premises portfolio is required to stimulate local company growth, inward investment and emerging industries'. Once again this underpins the concern that latent demand is not being met in Derby, which is supported to some extent by the higher take-up levels of land Wolverhampton has seen in the past three years despite being perceived generally as a slightly weaker market (though conversely it could be argued that Wolverhampton is simply more evenly priced if the lack of available sites in Derby has artificially raised prices).
- 3.4.8 Neither Wolverhampton nor Derby appears to have an employment land offer that is presently significantly stronger than Stoke/Newcastle. Wolverhampton arguably has the more immediately deliverable land supply; Derby has a marginally stronger demand – but on balance, with Stoke/Newcastle's slightly better strategic location and accessibility, there is no city with a clear economic advantage across this 'third tier'. The most important issue is that both Wolverhampton and Derby have recognised the need for large-scale, accessible sites to be brought forward as soon as possible – schemes not unlike Chatterley Valley. Future economic fortunes will be in large driven by which city is able to bring forward and effectively promote and fill new schemes the fastest and with the most growth industries. Simultaneously all will face a similar challenge of enhancing the offer of city centres that are invariably overshadowed by the wider choice of office, retail and leisure facilities offered by the big regional centres.

4 Taking stock of the existing situation – Stage 1

4.1 Introduction

4.1.1 Having assessed the strategic context, economic and planning policy backdrop, public and private sector views, we now turn to take stock of the existing employment land situation in Stoke and Newcastle. This section presents an assessment of existing employment land provision through a criteria based site appraisal methodology which emphasises market attractiveness and deliverability. It seeks to update the employment land supply position and to identify sites that should be realistically taken forward for more detailed analysis.

4.2 Stage 1 Site Appraisals

4.2.1 The ODPM guidance on undertaking Employment Land Reviews recommends that a simple assessment of the ‘fitness for purpose’ of the existing employment land portfolio should be undertaken. The guidance highlights how the principle outcome of the stage 1 site appraisals is the identification of the ‘best’ employment sites and the potential release of the existing or allocated sites that do not meet the relevant criteria and would be unlikely to meet future market demand. This section of the report outlines the work that was undertaken during the stage 1 site appraisals and identifies those sites that should undergo further appraisal to determine function relative to need, relative attractiveness, hierarchy, deliverability, accessibility.

4.2.2 Stage 1 site appraisals were carried out on a total of 168 sites (119 sites in Stoke-on-Trent and 49 in Newcastle-under-Lyme) that had been identified by representatives from Newcastle-under-Lyme Borough Council and Stoke City Council. The stage 1 site appraisals provided an opportunity to confirm the ‘high quality’ employment allocations which should be safeguarded for further employment use. This will help to ensure that the most appropriate sites are safeguarded for future employment use. The site appraisals also helped to identify the sites that should be discounted after stage 1.

4.2.3 During the stage 1 site appraisals, each site was visited and a site proforma was completed.

4.2.4 General information relating to each site was gathered, including a description, size and distance to the A50/A500/A34 (the major trunk roads in the study area). During the site visits, a visual assessment of the site was also carried out. This consisted of scoring the site on a scale of 1 to 5 (1 being poor and 5 being excellent) in relation to five different criteria, including its availability, internal environment and approaches, road accessibility, non-car access and neighbouring uses. These scores were then totalled to provide a score out of 25 for each site. Following this, a meeting was held with local authority representatives to review the findings and decide which sites should undergo a stage 2 appraisal.

Sites not to be taken forward to stage 2 analysis

4.2.5 Based on the pro forma scoring and discussions with respective local authorities it was agreed that a total of 47 sites in Stoke-on-Trent and Newcastle-under-Lyme (incorporating 263.76 hectares) should be discarded at Stage 1. 31 sites in Stoke-on-Trent and 16 sites in Newcastle-under-Lyme and were considered to be highly unlikely to realise employment development in the future. A full list is set out in Appendix 1.

4.3 Sites to undergo Stage 2 Appraisal

4.3.1 A total of 121 sites in Stoke-on-Trent and Newcastle-under-Lyme (incorporating 561 hectares) are adjudged to merit Stage 2 appraisal. Of these sites, 88 are located in Stoke-on-Trent. A number of sites located on Trentham Lakes and Festival Park scored particularly well in relation to the criteria used for the stage 1 site appraisals. Within Newcastle-under-Lyme, sites located at Keele Science Park scored particularly well. A number of sites located close to Newcastle Town Centre also scored well.

4.3.2 Appendix 2 sets out the scoring results for sites which were recommended to pass through for further Stage 2 consideration.

4.4 Summary of Stage 1 appraisal findings

4.4.1 Table 3.3 below summarises the sites that are recommended to undergo a stage 2 appraisal and those that should be discarded following the stage 1 appraisal.

Table 3.3: Summary of Stage 1 Site Appraisals

	Sites to undergo stage 2 appraisal		Sites discounted after stage 1 appraisal	
	Ha	Total number of sites	Ha	Total number of sites
Newcastle-under-Lyme	221	33	38	16
Stoke-on-Trent	340	88	225.76	31
Total	561	121	263.76	47

4.4.2 Tables 3.4 and 3.6 below summarise the distribution of employment sites for stage 2 appraisal in terms of suggested appropriate range of uses taken from the pro forma. Tables 3.5 and 3.7 simplify the analysis and apportion land areas equally where sites are suitable for a range of uses. Figures are rounded to the nearest hectare.

4.4.3 This analysis should be treated with caution. It does not necessarily mean that the hectareage identified is of sufficient quality, well located and deliverable. This is

assessed in more detail later in this Employment Land Review. In addition the figures are likely to reduce as gross areas are used where sites are likely to be mixed use in nature e.g. town centre locations. The analysis will be useful in providing an indication at this stage of the potential match between supply and need (identified in Chapter 5) in terms of category of use class.

Table 3.4: Stoke-on-Trent: Suggested appropriate land use categories for sites to be appraised in Stage 2 – taken from pro formas.

Use	Total Ha
B1a	36
B1a and B1c	4
B1c	7
B2	34
B8	45
Mixed	170
Mixed and B1a	44
TOTAL	340

Table 3.5: Stoke-on-Trent: Rationalised appropriate land use categories for sites to be appraised in Stage 2.

Use	Total Ha
B1a	49
B1c Light Industrial	77
B2 General Industrial	101
B8 Logistics	113
TOTAL	340

Table 3.6: Newcastle under Lyme: Suggested appropriate land use categories for sites to be appraised in Stage 2 – taken from pro formas

Use	Total Ha
B1a	30
B1b	55
B1c	9
B2	23
B1c/B8	1.5
B8	11
Mixed	7
Mixed and B1a	84
TOTAL	221

Table 3.7: Newcastle under Lyme: Rationalised appropriate land use categories for sites to be appraised in Stage 2.

Use	Total Ha
B1a/b (Offices)	106
B1c Light Industrial	33
B2 General Industrial	46
B8 Logistics	36
TOTAL	221

4.5 Conclusions from Stage 1

- 4.5.1 In light of the stage 1 site appraisals, we are able to draw some initial conclusions about future supply of employment land within Stoke-on-Trent and Newcastle-under-Lyme.
- 4.5.2 In total, stage 1 site appraisals were undertaken on a total of 168 sites across the study area. It is considered that 561 hectares of potential employment land exists across the study area (221 ha in Newcastle-under-Lyme and 340 ha in Stoke-on-Trent).

Industrial and Logistics

- 4.5.3 The supply assessment has identified a number of sites in Stoke which could be considered to serve a local market. Such sites tend to be smaller in scale, close to existing labour and offer reasonable access. Issues exist though particularly in Stoke in terms of general road access, the scale of existing dereliction on sites and surrounding them, environmental quality and commercial viability (high site costs versus modest rentals). The issue of viability will be potentially compounded in the short to medium term due to restricted public funding.
- 4.5.4 Supply of more strategic sites (particularly for B8 use) in both areas ideally will need to offer excellent access close or adjacent to the A500, A50 and A34, be of sufficient scale, close to labour markets and be well served by non car access modes. In terms of supply there are some very well located sites identified mainly in Stoke including Trentham Lakes, Chatterley Valley, Sideway, former Cookson Matthey site at Meir Park. These sites are more than likely to be taken up particularly for B8 before 2026. Planning policy may need to consider the balance between B1c, B2 and B8 uses on these and any other strategic sites to be identified to ensure that the identified future need can be met. This will need to consider the risk of being too specific which may stifle market interest. Use of s.106 powers could also potentially deliver B1 a offices on certain sites. Greenfield/greenbelt sites recommended for review in Stage 2 in Newcastle either side of the A34 near High Carr Business Park will require special planning consideration in terms of impact on green belt and exceptional need or very special circumstances for release.

- 4.5.5 The role that the large sites on Stoke's boundary at Blythe Vale and former Indesit site have to play in terms of meeting need will also need to be evaluated in terms of supply. Other locations such as in Crewe, Stafford and Stone have been identified as competitors.
- 4.5.6 Viability issues will affect many locations at several local and more strategic sites e.g. the Peacock Hay site at Chatterley Valley. Alternative approaches will need to be considered alongside new economic and planning policy initiatives to achieve a balanced supply including consideration of Greenfield and potentially green belt release in Newcastle, land swapping with private sector to reserve sites for particular employment uses, using publicly held land to lever private sector activity and investment in special purpose vehicles, ventures and Local Asset Backed Vehicles

Office and B1b uses

- 4.5.7 Keele clearly provides a unique offer and has a vital role in meeting B1b space for sectoral needs in medical technologies and does not appear to be in competition with other locations.
- 4.5.8 In terms of B1a offices there is a policy imperative identified within the Core Strategy to promote and realise office development in Hanley and Newcastle. Market and other stakeholder consultations however have revealed reservations in relation to Hanley as a viable location.
- 4.5.9 The aspirations for offices in Newcastle under Lyme will require land assembly and site preparation and will be subject to viability. Market consultations have shown a preference for out of town office locations such as festival Park and Etruria Valley – these will also be subject to viability.

5 Creating a Picture of Future Requirements – Stage 2

5.1 Introduction

5.1.1 This section seeks to develop a forward view of future requirements for employment land in Stoke and Newcastle. It seeks to achieve this through an assessment of

- historic take up trends and
- econometric forecasting which forecasts future land requirements according to forecasts in employment growth, extrapolating historic inward investment trends (using data provided by InStaffs), assessing needs of small firms and relocation/modernisation needs of existing occupiers. All these factors are assessed to establish land requirements.

5.2 Take-up Trend Analysis

5.2.1 An assessment has been made of potential employment land requirements in Newcastle and Stoke based on historic take-up patterns. This has been undertaken through analysis of historic trends for both take-up and enquiries for employment property and land.

Property and Land Enquiries

5.2.2 Data for both take-up of accommodation and the number and type of enquiries can be analysed to provide an indication of the recent demand trend for office and industrial accommodation and land.

5.2.3 In relation to enquiries information was obtained for InStaffs. InStaffs (UK) Limited was set up in 1997 to provide a comprehensive service to businesses seeking to invest or re-invest in Staffordshire. Until March 2010 it covered both Staffordshire county Council and Stoke on Trent areas. In April 2010 InStaffs became part of the Development Services Directorate of Staffordshire County Council.

5.2.4 InStaffs provided numbers of internet property searches undertaken comprising entries made by enquirers on the InStaffs website. Approximately 92 % of all registrations on the website are from companies and individuals. Only 2% are from agents and developers as they tend to telephone and discuss rather than search as they tend to want to know what is going to come on to the market rather than what is available now.

5.2.5 Clients have to register to search for available property. They can then search as many times as they like. The numbers provided represent the numbers of searches made. From research InStaffs has found the majority of enquirers make note of the properties they like, then either view or contact the agent. They invariably come back and search again. On average North Staffordshire receives 55% of all enquiries InStaffs receives.

5.2.6 It should be recognised that enquiries represent an indication of interest in property and land and does not equate to sites being acquired or developed or buildings let and occupied. The data does show trends in early stage market activity which if converted would result in take up of land for development. Data was available for 2007 (June to December), 2008 and 2009 in full and for 2010 the data covers the period to 12th October and this is set out in the table below.

Table 4.1: Internet Property Searches Received by InStaffs for Property in Stoke-on-Trent (SOT) and Newcastle-under-Lyme (NUL) from 1st June 2007 to 12th Oct 2010.

	June to Dec 2007		2008		2009		2010	
	NUL	SOT	NUL	SOT	NUL	SOT	NUL	SOT
OFFICE								
Less than 1000 sq ft	121	124	345	546	580	925	343	273
Between 1001 and 3000 sq ft	58	77	194	290	314	401	118	119
Between 3001 and 5000 sq ft	17	39	80	94	78	133	18	32
Between 5001 and 10000 sq ft	36	34	55	75	56	82	27	25
Between 10001 and 50000 sq ft	29	35	60	92	49	72	28	22
Between 50001 and 99999 sq ft	39	30	25	26	6	9	5	5
INDUSTRIAL								
Less than 1000 sq ft	86	126	310	433	798	1212	319	318
Between 1001 and 3000 sq ft	148	183	380	531	878	1139	294	402
Between 3001 and 5000 sq ft	60	78	211	313	398	512	169	275
Between 5001 and 10000 sq ft	100	146	407	499	628	763	239	351
Between 10001 and 50000 sq ft	127	174	432	566	650	851	366	326
Between 50001 and 99999 sq ft	60	84	64	95	39	51	23	24
Greater than 99999 sq ft	70	121	102	142	152	178	70	48
LAND								
Less than 10 acres	47	91	84	124	276	384	200	212
Between 10 and 49 acres	29	49	48	62	13	27	21	31

Between 50 and 99 acres	4	5	12	8	4	13	4	6
Greater than 100 acres	22	27	139	205	3	5	1	6

Offices

- 5.2.7 **Newcastle under Lyme** - Enquiries for smaller sized offices in Newcastle have increased significantly from 2007 onwards. Enquiries rose by 66% from 2008 to 2009 in buildings up to 3,000 sq ft and enquiries for buildings over 3,000 to 50,000 sq ft remained fairly consistent with an overall upward trajectory between 2007 and 2009. Enquiries in Newcastle for office space over 50,000 sq ft have fallen significantly over the last 3 years.
- 5.2.8 Overall the data shows a sustained upward growth in enquiries for office space in Newcastle in the past 3 years.
- 5.2.9 **Stoke on Trent** - Enquiries for smaller sized offices in Stoke have increased significantly from 2007 onwards. Enquiries rose by 59% from 2008 to 2009 in buildings up to 3,000 sq ft. and enquiries for buildings over 3,000 to 50,000 sq ft remained fairly consistent with an overall upward trajectory between 2007 and 2009. Enquiries in Stoke for office space over 50,000 sq ft have fallen significantly over the last 3 years.
- 5.2.10 Overall the data shows a sustained upward growth in enquiries for office space in Newcastle in the past 3 years.

Industrial

- 5.2.11 Enquiries for industrial space have increased significantly for both authorities in all property sizes except for the 50 - 100,000 sq ft category where enquiries have witnessed a marked decrease over the last 3 years.

Land

- 5.2.12 Enquiries in land in both authorities up to 10 acres have increased significantly from 2007 onwards. Enquiries for between 10 and 50 acres have see-sawed and the 2009 levels were down on 2008 figures however 2010 has shows a measure of improvement. Enquiries for sites between 50 and 99 acres has remained fairly consistent over the period, however enquiries in sites of over 100 acres have decreased dramatically from 2008 to 2010 which is perhaps more reflective of the state of the development industry.
- 5.2.13 Overall the data shows for the period 2007 to 2010 a healthy picture of enquiries in sites under 10 acres, a resilient picture for sites of between 50 to 99 acres, a more uneven picture for sites of between 10 to 50 acres and a very significant decline in enquiries for land over 100 acres.

2009 to 2010 enquiries

- 5.2.14 The early months of 2009 saw an increase in the number of enquiries received by the website and discussion with agents suggest that there was a corresponding increase in the number of completions due to reducing rental and capital values and landlords/landowners operating in a depressed market. Rents and land prices have typically dropped by 25 to 30% across Stoke and Newcastle between mid 2009 to mid 2010. As the recession has deepened, however the number of enquiries has reduced. 2010 has seen a reduction in the number of registrations of over 20% compared with the same period last year.

5.3 Conclusion on enquiries data

- 5.3.1 Although the enquiries data from InStaffs provides some interesting statistics it is not felt that these provide a sufficiently reliable basis from which to draw conclusions on future demand. The advice from local agent, Butters John Bee is somewhat contradictory to the increased number of enquiries reported by InStaffs i.e. Butters consider that enquiries have been significantly less year on year since late 2007.

5.4 Employment land take up trends

- 5.4.1 Data was obtained from both local authorities and was drawn from their Annual Monitoring Reports. This is analysed below.

Stoke on Trent

- 5.4.2 Table 4.2 below sets out the completions for Stoke on Trent for the period from 2001 to 2010.

Table 4.2: Stoke on Trent's employment land take up from 2000 to 2010

Year	B1 (ha)	B2 (ha)	B8 (ha)	Mixed (ha)	Total (ha)	5 year average (ha)
2000/2001	0.9	1.1	2.9	0	4.9	
2001/2002	5.1	0.8	23.2	0	29.1	
2002/2003	5.8	0.4	13.8	3.4	23.4	
2003/2004	0	0	1.2	4.8	6	
2004/2005	1.45	0.5	9.58	1.08	12.61	15.20
2006/2006	3.37	4.29	29.9	0	37.56	21.73
2006/2007	1.43	0.08	8.65	0.91	11.07	18.13
2007/2008	2.2	3.22	0	0	5.42	14.53
2008/2009	0.16	7.68	8.45	1.3	17.59	16.85
2009/2010	4.65	1.734	3.94	2.31	12.64	16.85
TOTAL	25.06	19.8	101.62	13.8	160.28	

- 5.4.3 The data highlights the substantial variance from year to year and also the effect that a small number of large developments (B8 warehouses which sit in extensive grounds) can have. For example, in 2005/06 year, 17.6ha of the 37ha completed was a single B8 site including a substantial area of expansion land and a balancing pond.
- 5.4.4 The 5 year average is the average take up over the previous 5 years and runs from 2005 to 2010 (figure for 2009/10 is draft). The average take up of the 5 year average figures between 2005 and 2010 is 17.2 hectares. This is similar to the overall average annual take up total of 16 hectares in the period 2001 to 2010.
- 5.4.5 The Core Strategy sets a target of 220 hectares for Stoke-on-Trent between 2006 and 2026. Completions of 46 hectares occurred in the period from 2006/7 to 2009/10, giving a revised target figure of 174ha between 2010 and 2026.
- 5.4.6 For the period 2010 to 2026 (i.e. 15 years) the estimated take up using the average take up of the 5 year average figures between 2005 and 2010 is 258 hectares giving an under estimate of the target by 84 hectares. Using the average annual take up rate (2000 to 2010) of 16 hectares provides an estimated take up of 240 hectares giving a potential under estimate of the target by 66 hectares.
- 5.4.7 Based on historic take up of employment land it can be concluded therefore in relation to Stoke that there could be an under estimate of between 66 hectares and 84 hectares in the current Core Strategy target of 174 hectares. This means that a revised target could be considered of between 240 hectares and 258 hectares.

Newcastle under Lyme

- 5.4.8 Table 4.3 below sets out the completions for Newcastle under Lyme for the period from 2001 to 2010.

Table 4.3: Stoke-on-Trent's employment land take up from 2000 to 2010

Year	B1 (ha)	B2 (ha)	B8 (ha)	Mixed (ha)	Total (ha)	5 year average (ha)
2000/2001					5.27	
2001/2002					13.46	
2002/2003					6.65	
2003/2004					0.25	
2004/2005					5.06	6.14
2006/2006	0.45	0.53	7	1.17	9.15	6.91
2006/2007	0.95	12.77	0	0	13.72	6.97
2007/2008	1.09	2.41	22.1	4.15	29.75	11.59
2008/2009	0.16	4.4	16.64	1.63	22.83	16.10
2009/2010	0.19	0.94	0	0.5	1.63	15.42
TOTAL					107.77	

- 5.4.9 The 5 year average is the average take up over the previous 5 years and runs from 2005 to 2010. The average take up of the 5 year average figures between 2005 and 2010 is 10.52 hectares. This compares closely to the overall average annual take up total of 10.78 hectares in the period 2001 to 2010.
- 5.4.10 The Core Strategy sets a target of 112 hectares for Newcastle-under-Lyme between 2006 -2026. Completions of 67.93 hectares occurred in the period from 2006/7 to 2009/10, giving a revised target figure of 44.07 between 2010 and 2026.
- 5.4.11 For the period 2010 to 2026 (i.e. 15 years) the estimated take up using the average take up of the 5 year average figures between 2005 and 2010 is 157.8 hectares giving an under estimate of the target by 113.73 hectares. Using the average annual take up rate (2000 to 2010) of 10.77 hectares provides an estimated take up of 161.6 hectares giving a potential under estimate of the target by 117.35 hectares.
- 5.4.12 Based on historic take up of employment land it can be concluded therefore in relation to Newcastle under Lyme that there could be an under estimate of between 113.73 hectares and 117.35 hectares in the current Core Strategy target of 44.07 hectares. This means that a revised target could be considered of between 157.8 hectares and 161.42 hectares.

5.5 Econometric forecasting

Introduction

- 5.5.1 Adroit Economics Ltd was commissioned to undertake an economic analysis of the two economies, to formulate a method for forecasting employment change and to model the implications for future employment land requirements.
- 5.5.2 This section summarises the Adroit work and the full paper which sets out the approach and methodologies used and the results of this work is included at Appendix 4.

Overall approach

- 5.5.3 We adopted the following approach
- First we undertook a high level economic baseline assessment, mapping employment, employment change and relative strengths in the two economies, compared with (benchmarked against) a range of other comparable cities/ towns
 - Second, we undertook a more detailed analysis of the stoke and NuL economies, at 2-digit SIC level, examining past trends and estimating future potential employment, productivity (GVA per FTE) and GVA
 - Third, we formulated a model to convert estimated employment change into future demand for employment floor space and sites.

Method for forecasting employment land needs based on employment projections

5.5.4 Converting employment forecasts to demand/need for floor space and sites involved 7 steps.

Figure 4.1: Model to Convert Employment Forecasts to Demand/Need for Floor Space and Land

Model to convert employment forecasts to demand/need for floor space and land	
Step	Details
Step 1	Download 2-digit SIC employment data for the latest period (in this case 1998-2008) and convert to FTE (assessing 2 PT = 1 FT)
Step 2	Project forward to target year (2025) by applying annual % change to each year (either the change pa derived from the actual data, or where it's necessary to override this default, an assumed % change
Step 3	Convert actual and projected FTE employment data from the c.60 2-digit SICs to five or six employment land use categories
Step 4	Convert employment to floor space equivalent by applying an average sq ft per FTE for each land use type (allow for density change over time)
Step 5	Convert floor space to land take, assuming an appropriate development density ratio
Step 6	This analysis provides estimated floor space and land take pa. Calculate change from current year to end of period (2010-25)
Step 7	Add to this estimated up-grade/ modernisation needs

5.5.5 We have undertaken two parallel sets of calculations

Employment-based analysis

5.5.6 We projected forward past employment forward and converted this into floor space and land take.....future demand will be a combination of land required to accommodate net additional jobs plus land required to enable upgrade/ modernisation of existing stock

Component analysis

5.5.7 We projected forward past increase in the number of small firms (employing 1-10) and estimated the land required to accommodate these; and

5.5.8 We projected forward past inward investment trends and estimated land required to accommodate additional inward investment

5.5.9 The results of these two assessments are to be considered alongside the main employment analysis abovethey help us understand what proportion of future demand will be driven by small firms and by inward investment

Spreadsheet model

5.5.10 All of the input data and analysis is set out in a series of linked sheets in a large interlinked excel-based model

5.5.11 The analysis includes a number of key assumptions....the team have reviewed the assumptions in the light of the field work and their wider experience, and are happy with the balance of assumptions made

5.5.12 Key assumptions are

- To project future employment per land use type
 - = Estimated annual % change per 2-digit SIC 1998-2025
 - = Allocation of 2-digit SICs to 6 broad land use types
- To convert employment to floor space
 - = Average floor space per FTE average the 6 land use types
 - = Annual % change in floor space per FTE 2010-25
- To convert floor space to land
 - = Average development density for each of the 6 land use types
- To estimate upgrade/ modernisation needs
 - = Estimated % of current occupied stock that will need to upgrade/ modernise via relocating to new (better) sites and premises

Bottom-up reality check

5.5.13 The data analysis can be subject to error. The way some of the employment data is categorised makes it difficult to cross match it with one of the 6 main land use types. The analysis is also subject to a series of other 'conversion' assumptions. Some of the employment data may be missing (screened due to confidentiality)

5.5.14 It is therefore important to cross-check the emerging results from a bottom-up perspective, from the team's knowledge of what has actually happened on the ground. This provides a reality check. It also helps us refine the assumptions and categorisations. This is an iterative process ensuring that the detailed modelling has been reality checked

5.6 Sector and growth opportunities assessment

5.6.1 The following table sets out a very high level assessment of the key sectors and niches that offer most opportunity going forward and of the specific needs of each. This is not based on a detailed study but instead is based on Adroit's in-depth experience of identifying key growth sectors and on the team's knowledge of Stoke and NuL.

Figure 4.2: Sector and Growth Opportunities Assessment

Sector/ niche	Opportunity & progress	Need
Health (med-tech)	Regions with strong research base, specialist skills base, engineering cluster and available lab space can capture growing share of this market	Provision of more expensive lab facilities with proximity to skills and research base
Renewable energy	Emergent – develop supply chains, installation and servicing	Pilot programmes – industry, residential, public sector Skills training centre combined with pilot/ technical service centre
Electric Vehicles	Most main UK primes likely to manufacture their electric car to serve European market – starting 2015 onwards Opportunity to gain share of supply chain, of distribution and servicing – and charging infrastructure	Explore and promote opportunities to local manufacturing base Market motorway sites to inward investors Pilot Evs and EV charging infrastructure
Ceramics	Unique legacy skills and tacit knowledge base – already attracting new investment	Right types of space in right locations Retraining/ deskilling and assistance to work
Digital	Everyone can join this party – grow the local IT/digital/creative sector Also, ensure wider economy adopts and exploits ICTs – c.£3.3bn GVA uplift in region over next 5-7 years	Aggressive ICT business support programme Aggressive ICT skills programme Aggressive support to local IT sector Pro-actively explore commercial deployment of world class broadband (FtP)
Wider manufacturing	Only broad sector that has shown strong employment growth – we need to understand this more???	Right types of space in right locations Retraining/ deskilling and assistance to work Research wider needs of this sector
Logistics	Motorway proximity will continue to attract mobile logistics operations	Sites with immediate motorway access offering right space on right terms
Financial and business services	Motorway proximity will continue to attract regional and national (back office) functions	Sites with immediate motorway access offering ready-to-occupy space – especially including small flexible units

5.7 Converting employment projections to broad land requirements

5.7.1 In this section, we translate the employment projections set out in the previous section into estimated demand/ need for 5 broad types of sites and premises⁴

5.7.2 We used the following simple land-use typology :

Heavy industrial	HI
Logistics	L
Light industrial	LI
Medium industrial	MI
Office	O
Retail	R

5.7.3 We estimate that land (HA) required by 2025 will be in the vicinity of 370 HA. This figure breaks down as follows:

- to meet upgrade/ modernisation needs of existing occupied stock will be

⁴ We've included retail as a 6th category, not because retail activities are included in the employment land assessment but because some of the activities under the retail heading may be warehousing and distribution. We felt that it was important for the study to be cognisant of the scale of employment and hence sites and premises associated with retail. This can be taken into consideration towards the end of the process where we consider a number of factors – quantitative and qualitative – to arrive at our overall judgement of future demand

= Stoke	124 ha
= NuL	45 ha
= Stoke+NuL	170 ha

- to accommodate net additional jobs will be

= Stoke	103 ha
= NuL	104 ha
= Stoke+NuL	207 ha

- Totalling.....

= Stoke	227 ha
= NuL	150 ha
= <u>Stoke+NuL</u>	<u>377 ha</u>

5.7.4 The econometric forecasting suggests:

For Stoke

- Significant falling requirement for heavy industrial land
- Significantly increasing requirement for logistics land
- Limited / static requirement for other employment land use types

For NuL

- Significant requirement for logistics, office and retail land
- Limited requirement for light industrial land
- Limited decline in requirement for heavy industrial land
- Static demand for medium industrial land

5.7.5 The following tables provide a detailed breakdown of each set of figures.

Table 4.4: Stoke-on-Trent – Broad employment land requirements to 2026

STOKE		Final results						
STEP 7								
Adding additional land to meet upgrade/modernisation needs		Land HA required by 2026			Land HA required by 2026 (all negatives converted to zero)			
	% of stock in 2010 that will require upgrading/modernisation AND on new land (rather than on existing land)	upgrade HA	HA based on emp growth	Total upgrade and growth	upgrade HA	HA based on emp growth	Total upgrade and growth	
Heavy industrial	20%	83.0	-	44.9	83.0	-	83.0	
Logistics	10%	17.4	92.9	110.4	17.4	92.9	110.4	
Light industrial	20%	8.3	3.9	12.3	8.3	3.9	12.3	
Medium industrial	20%	7.7	0.9	8.6	7.7	0.9	8.6	
Office	20%	7.8	5.3	13.1	7.8	5.3	13.1	
Retail	10%	7.9	1.6	9.6	-	-	-	
		132.2	66.6	198.8	124.2	103.1	227.4	
Inward investment contribution							110.8	49%
Additional small firms (contribution)							61.6	27%

Table 4.5: Newcastle-under-Lyme – Broad land requirements to 2026

NuL		Final results						
STEP 7		Land HA required by 2026			Land HA required by 2026 (all negatives converted to zero)			
Adding additional land to meet upgrade/modernisation needs	% of stock in 2010 that will require upgrading/modernisation AND on new land (rather than on existing land)	upgrade HA	HA based on emp growth	Total upgrade and growth	upgrade HA	HA based on emp growth	Total upgrade and growth	
Heavy industrial	20%	21.5	25.7	47.2	21.5	25.7	47.2	
Logistics	10%	13.2	37.1	50.4	13.2	37.1	50.4	
Light industrial	20%	4.6	20.4	25.0	4.6	20.4	25.0	
Medium industrial	20%	2.9	7.6	10.5	2.9	7.6	10.5	
Office	20%	3.3	13.5	16.9	3.3	13.5	16.9	
Retail	10%	4.9	44.6	49.5	-	-	-	
		50.5	148.9	199.4	45.5	104.3	149.8	
Inward investment contribution							27.8	19%
Additional small firms (contribution)							55.0	37%

Table 4.6: Stoke-on-Trent and Newcastle-under-Lyme combined– Broad land requirements to 2026

Stoke + NuL		Final results						
STEP 7		Land HA required by 2026			Land HA required by 2026 (all negatives converted to zero)			
Adding additional land to meet upgrade/ modernisation needs		upgrade HA	HA based on emp growth	Total upgrade and growth	upgrade HA	HA based on emp growth	Total upgrade and growth	
Heavy industrial		104.5	- 12.4	92.1	104.5	25.7	130.2	
Logistics		30.7	130.1	160.7	30.7	130.1	160.7	
Light industrial		12.9	24.3	37.3	12.9	24.3	37.3	
Medium industrial		10.6	8.5	19.0	10.6	8.5	19.0	
Office		11.1	18.9	30.0	11.1	18.9	30.0	
Retail		12.9	46.2	59.1	-	-	-	
Total		182.7	215.5	398.2	169.8	207.4	377.2	
Inward investment contribution							138.6	37%
Additional small firms (contribution)							116.5	31%

5.8 Conclusions on future requirements

Stoke on Trent

- 5.8.1 Based on historic take up of employment land it can be concluded that there could be an under estimate of between 66 hectares and 84 hectares in the current Core Strategy target of 174 hectares. This means that a revised target could be considered of between 240 hectares and 258 hectares.
- 5.8.2 The econometric forecasting work considers predictions at local and national levels and should be read in greater detail in the appendix. This suggests an employment land requirement of 227.4 hectares.
- 5.8.3 Ultimately each method has strengths and weaknesses and can only be used as a guide to an informed judgement on future position. It is however helpful that these estimates are broadly similar, however they do indicate that the current target requirement should be re-assessed in an upwards direction.
- 5.8.4 The take up trend work provides a range and should be viewed as a yardstick. In terms of forward planning it would be appropriate to employ a flexible range between the average of the two take up trend figures (249) and the econometric forecasting (227)
- 5.8.5 **For the purposes of the ELR it is recommended to work to a figure of 230 hectares as it is more practical to work to a specific figure.** The broad distribution of this area in land types (using planning use classes) is assessed as follows (using table 4.7 as a basis):

Table 4.7 Estimated land requirements in Stoke on Trent by land use to 2026

Employment land use	Estimated Land requirement to 2026 (ha)
B1a/b (Predominantly offices)	14
B1c (Light Industrial)	15
B2 (Medium and Heavy Industrial)	91
B8 (Logistics)	110
TOTAL	230

Newcastle under Lyme

- 5.8.6 Based on historic take up of employment land it can be concluded in relation to Newcastle under Lyme that there could be an under estimate of between 113.73 hectares and 117.35 hectares in the current Core Strategy target of 44.07 hectares. This means that a revised target could be considered of between 157.8 hectares and 161.42 hectares.
- 5.8.7 The econometric forecasting work considers predictions at local and national levels and should be read in greater detail in the appendix. This suggests an employment land requirement of 149.8 hectares.
- 5.8.8 Ultimately each method has strengths and weaknesses and can only be used as a guide to an informed judgement on future position. It is however helpful that these estimates are broadly similar, however they do indicate that the current target requirement should be re-assessed in an upwards direction.
- 5.8.9 The take up trend work provides a range and should be viewed as a yardstick. In terms of forward planning it would be appropriate to employ a flexible range between the average of the two take up trend figures (160) and the econometric forecasting (150)
- 5.8.10 **For the purposes of the ELR it is recommended to work to a figure of 150 hectares as it is more practical to work to a specific figure.** The broad distribution of this area in land types (using planning use classes) is assessed as follows (using table 4.8 as a basis):

Table 4.8 Estimated land requirements in Newcastle under Lyme by land use to 2026

Employment land use	Estimated Land requirement to 2026 (ha)
B1a/b (Predominantly offices)	17
B1c (Light Industrial)	25
B2 (Medium and Heavy Industrial)	58
B8 (Logistics)	50
TOTAL	150

6 Identifying a ‘New’ Portfolio of Sites – Stage 3

6.1 Introduction

6.1.1 This stage builds on the assessment of sites undertaken as part of the stage 1 site appraisal process. This assessment identified the development potential of sites within the existing portfolio and sites which should be released from employment use provision. Taking into account the conclusions from the previous chapter, in terms of the likely forward requirements for employment land within Stoke-on-Trent and Newcastle-under-Lyme, this section more rigorously assesses the sites to identify the adequacy of the supply of employment land and the extent of any gaps in the portfolio.

6.1.2 The outcome of the Stage 2 site appraisal is a new portfolio of sites that will seek to meet local and strategic planning objectives and serve requirements of businesses and developers. This stage represents the completion of the employment land review and the New Portfolio of sites to be taken forward in the Local Development Framework.

6.2 Stage 2 Site Appraisals

6.2.1 A total of 121 sites in Stoke-on-Trent and Newcastle-under-Lyme were adjudged to merit stage 2 appraisal. The purpose of the stage 2 site appraisal was to undertake a detailed assessment of each site, to enable a judgement as to the attractiveness, deliverability and the most appropriate employment use(s) - (B1a/b, B1c, B2 or B8) for each of the sites.

Part A – Locational Factors

6.2.2 Part A of the stage 2 site appraisal entailed carrying out an assessment of the locational factors of each site. A number of locational factors were explored including:

- Proximity to key markets
- Proximity to the A500/A50/A34 – in making a judgement on the time it takes to access key trunk roads in the study area, an average urban speed of 30km/hour was used.
- Proximity to Stoke-on-Trent Railway Station– in making a judgement on the time it takes to access Stoke-on-Trent railway station, an average urban speed of 30km/hour was used.
- Local Accessibility – an assessment of the local accessibility of each of the sites was done by interrogating GIS mapping layers to establish the number of residential properties within 1.5 miles (walking distance) and 5 miles (cycling distance) radii. Sites close to high numbers of properties scored best.
- Proximity to Central Business District (Stoke and Newcastle Centres)
- Site Image – Local commercial agents Butters John Bee provided advice on the market potential of each of the sites in order to inform the scoring for this factor.
- Environs Image – Butters John Bee provided advice on the market appeal of each of the immediate location in order to inform the scoring for this factor.

6.2.3 A score of between 1 and 5 was given for each of the different locational factors explored, in relation to each of the employment uses that could be delivered. This led to a final part A score for each employment use. Only those employment use(s) that scored the highest were then taken through and scored for part B of the stage 2 site appraisal.

Part B – Basic Deliverability Issues

6.2.4 Part B of the stage 2 site appraisal involved assessing the preferred employment use(s) for each of the sites against a set of deliverability issues. The deliverability issues considered included:

- Land Ownership – this information (where known) was provided by Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council, to the best of their knowledge at the time of writing.
- Owner/Developer Track Record
- Future Tenure
- Site Access
- Strategic Planning
- Local Planning
- Utility Infrastructure
- ICT Infrastructure
- Physical Constraints – Remediation
- Physical Constraints – Demolition
- Funding

6.2.5 The scores for part A and B were combined to give a final score for the preferred use(s) as part of the stage 2 appraisal. An overall summary was provided on each pro forma to summarise any key issues associated with each site. A judgement on the realistic timescale for redevelopment of each of the sites for employment uses was also made (0-6 years, 6-11 years or 11-16 years). In general, those sites that scored highest were judged to be deliverable in the short term and those that scored lowest (and had significant delivery constraints), in the long term.

Assumptions

6.2.6 In undertaking the stage 2 site appraisals, a number of assumptions were made. These are set out below:

- In assessing the local accessibility of a site, it was assumed that those living within 1.5 miles and 5 miles would have the relevant skills required to access the employment opportunities likely to be generated on each site.
- Where sufficient information was unavailable for a specific factor investigated as part of the detailed assessment, a score of 2.5 was assigned. This was a particular issue when looking at 'Future Tenure' and 'ICT Infrastructure'.
- A judgement was made on whether a site would require remediation through observing the current state of the land (e.g. whether it was heavily tipped).

However, further investigation would be required in order to gain an accurate answer as to whether remediation would be required.

- For a number of the sites (particularly those in Stoke-on-Trent) planning applications had been submitted for mixed use schemes, where only an element of the site would be available for employment uses. Where this is the case, only the estimated proportion of the site likely to be available for employment uses is counted.

6.3 Stage 2 Site Appraisal Findings

- 6.3.1 Appendix 5 summarises the findings for each of the sites for which a stage 2 site appraisal was undertaken. The table identifies the total overall score from the stage 2 site appraisal for each employment use to establish the preferred use for each site. This score is then used to establish the total area that could be available for the preferred uses.
- 6.3.2 The likely timescale for redevelopment on each site is also detailed within the table, along with any issues relating to deliverability on each of the sites. Sites are ordered into their likely timescale for redevelopment with appendix 6. This enables the gross supply of employment land in three different timescales (0-6 years, 6-11 years and 11-16 years) to be calculated.
- 6.3.3 Those sites which were considered inappropriate for the new portfolio and the reasons why this was adjudged are listed at the end of Appendix 6.

6.4 Analysis of Future Land Requirements and Existing Supply

- 6.4.1 Tables 6.1 and 6.2 below summarise the results of the stage 2 site appraisals for Stoke-on-Trent and Newcastle-under-Lyme. The tables show the gross supply of employment land for the two areas in comparison to the demand/need forecast that has been identified through the econometric forecasting and historic take up analysis. In addition they show the gross supply of employment land for each use (shown as a range) that could potentially come forward in the short term (0-6 years), medium term (6-11 years) and long term (11-16 years).
- 6.4.2 It is considered that 435.52 hectares of potential employment land exist across the study area (300.06 ha in Stoke-on-Trent and 135.46 in Newcastle-under-Lyme). This represents a decrease of 125.48 hectares from the potential supply identified following the stage 1 site appraisals. The reason for this reduction is due to the removal due to issues of delivery and suitability of a number of sites following the more detailed stage 2 site appraisals and the more accurate calculation of the total area of a site that is likely to be available for employment uses. The sites removed following the stage 2 site appraisals are detailed in appendix 6.
- 6.4.3 A number of the sites scored highly for more than one employment use. To account for this, the tables below show a range of scores for each use over the different timescales. The lowest figure presented in the range has been calculated by allocating

a single preferred use for each site. Where a site has scored highly for more than one use the whole site area is allocated to each of the highest scoring employment uses to calculate the higher figure in the range.

- 6.4.4 It should be noted that the higher figures do not clearly represent the total amount of employment land available as the total hectareage available on each site has been included in the supply for a number of uses. Once a site is developed for a particular employment use, there will be a consequential impact on other uses as that site will no longer be available for alternative employment uses.
- 6.4.5 When calculating the 'Total gross supply for each use', the 'Total gross supply in each timescale' and the 'Potential over/under supply' in tables 6.1 and 6.2, the lower figure has been used.

Table 6.1: Stoke-on-Trent: Gross supply of employment land versus demand/need forecast – summary of expected timescales for delivery to 2026 (Figures shown as ranges not absolutes)

Use	Demand/Need Forecast	Gross Supply of Land (Ha) 0-6 Years (shown as a range)	Gross Supply of Land (Ha) 6-11 Years (shown as a range)	Gross Supply of Land (Ha) 11-16 Years (shown as a range)	Total supply (calculated using lower figure in range)	Potential over supply or under supply (calculated using lower figure in range)
B1a/b (Predominantly Offices)	14	17.7 - 22.35	9.23 - 35.49	6.87	33.8	+19.8
B1c (Light Industrial)	15	3.83 - 20.34	22.69 - 39.79	6.43 - 42.32	32.95	+17.95
B2 (Medium and Heavy Industrial)	91	12.89 - 42.44	54.14 - 107.81	53.79 - 55.18	120.82	+29.82
B8 (Logistics)	110	66.45 - 82.60	46.57 - 78.26	0 - 12.23	113.02	+3.02
Total (calculated using lower figure in range)	230	100.34	132.63	67.09	300.06	+70.06

Table 6.2: Newcastle-under-Lyme: Gross supply of employment land versus demand/need forecast – summary of expected timescales for delivery to 2026 (Figures shown as ranges not absolutes)

Use	Demand/Need Forecast	Gross Supply of Land (Ha) 0-6 Years (shown as a range)	Gross Supply of Land (Ha) 6-11 Years (shown as a range)	Gross Supply of Land (Ha) 11-16 Years (shown as a range)	Total supply (calculated using lower figure in range)	Potential over supply or under supply (calculated using lower figure in range)
B1a/b (Predominantly Offices)	17	32.66 – 32.97	2.77	0	35.43	+18.43
B1c (Light Industrial)	25	4.13 – 5.63	2.06 – 11.35	0.91	7.1	-17.9
B2 (Medium and Heavy Industrial)	58	5.99 – 14.01	29.78	0 – 49.14	35.77	-22.23
B8 (Logistics)	50	8.02 - 12.56	0 – 9.29	49.14	57.16	+7.16
Total (calculated using lower figure in range)	150	50.8	34.61	50.05	135.46	-14.54

6.5 Sectoral Provision

6.5.1 An important element of the stage 3 process is to ensure that the new portfolio of sites provides for a sufficient supply of employment land to meet the requirements of each of the key sectors and niches for Stoke-on-Trent and Newcastle-under-Lyme that offer the most opportunity going forward. The extent to which these requirements are met by the site portfolio is addressed below.

Stoke-on-Trent

B1a (Offices) & B1b (Research and Development)

6.5.2 Potentially, there is an adequate supply of B1a/b supply in Stoke on Trent with a potential oversupply of 19.8 hectares identified within table 6.1. Key identified sites within Stoke-on Trent that will help to meet the demand for B1a/b use include Festival Park, Hanley Central Business District and Stoke Sidings.

6.5.3 The key growth sectors that fall within the B1a/B use class include 'Digital', 'Financial and business services' and 'Health (med-tech)'. In terms of meeting the demands of

the key sectors, the quality of supply is constrained due to location and market attractiveness. If this can be addressed by public sector intervention then the identified supply will become more viable and deliverable, particularly in the CBD. Keele Science Park in Newcastle-under-Lyme provides an excellent alternative for companies locating within the 'Health (med-tech)' sector.

B1c (Light Industry)

- 6.5.4 The range of hectareage that is potentially available for B1c use over the next 16 years suggests that there is sufficient supply of land for this use in Stoke-on-Trent. However, when considering the lower figure in the range (the figure that encapsulates the sites where B2 is the preferred use).in the short term there is a limited supply of sites appropriate for B1c use. If sites identified to be most appropriate for this use are not delivered in the medium and long term, then the demand for B1c will not be met.
- 6.5.5 Key identified sites that could help meet the demand for B1c use include the Former Royal Doulton Works (Burslem), Former Spode Works (Stoke), Minton Hollins Land (Stoke) and land either side of Clough Street (Hanley). However, some of these sites have deliverability constraints associated with them that could impede their potential for development. In terms of meeting the key sector identified within this use class (Renewable energy) there could therefore be an issue in the medium/long term.

B2 (General Industrial)

- 6.5.6 The range of hectareage that is potentially available for B2 use over the next 16 years suggests that there is sufficient supply of land for this use in Stoke-on-Trent. However, when considering the lower figure in the range (the figure that encapsulates the sites where B2 is the preferred use), there is potentially an inadequate supply of sites.in the short term. If sites identified to be most appropriate for this use are not delivered in the medium to long term, then the demand for B2 may not be met.
- 6.5.7 Key identified sites that could help meet the demand for B2 use include Trentham Lakes, Caradon Twyford's Excelsior Works (Cliffe Vale), Fenton Industrial Estate and Land off Newstead Industrial Estate. However, some of these sites (particularly those identified in the medium and long term supply) have deliverability constraints associated with them that could impede their potential for development. In terms of meeting the key sectors identified within this use class (Electric Vehicles, Ceramics and Wider Manufacturing), there could therefore be an issue in the medium/long term.

B8 (Storage and Distribution)

- 6.5.8 There is a good supply of land available for B8 use in Stoke-on-Trent in the short term that contributes towards the demand for this use over the next 16 years. In particular, the sites at Trentham Lakes and the Radial Park, Sideway site contribute a significant proportion of land that would be available for B8 use. Thereafter, the supply depends heavily upon the delivery of sites at Etruria Valley, which currently have significant access/remediation constraints. In terms of meeting the key sectors identified within this use class (Logistics) there could therefore be an issue in the medium/long term.

- 6.5.9 The delivery of land for B8 use could also be supplemented at the Indesit site if planning is consented

Newcastle-under-Lyme

B1a (Offices) & B1b (Research and Development)

- 6.5.10 Within Newcastle-under-Lyme, there appears to be an adequate supply of land appropriate for B1a/b use. However, the majority of this supply consists of land at Keele Science Park measuring 29.24 hectares (sites R168 and R69), which is primarily for B1b use. We have also considered a site close to Keele Science Park (site reference: R127). At this stage, it is not intended to include this site within the portfolio of sites because of its Green Belt status.
- 6.5.11 The supply of B1a land relies on the delivery of sites in Newcastle Town Centre. These sites are considered to be reasonably attractive but are likely to be constrained in relation to land assembly and viability. The key growth sectors that fall within the B1a/B use class include 'Digital', 'Financial and business services' and 'Health (med-tech)'. In terms of meeting the demands of the key sectors, the constraints highlighted will need to be addressed potentially by public sector intervention to ensure that the supply will be viable and deliverable across the plan period.
- 6.5.12 Keele Science Park does however provide an excellent location for businesses wanting to develop employment land within the 'Health (med tech)' sector over the plan period.

B1c (Light Industry)

- 6.5.13 The range of hectareage that is potentially available for B1c use over the next 16 years suggests that there is insufficient supply of land for this use in Newcastle-under-Lyme. Table 6.2 suggests that there is a potential under supply of 19.96 hectares.
- 6.5.14 In terms of meeting the key sector identified within this use class (Renewable energy), there is likely to be an issue due to the shortage of land available for B1c use in Newcastle-under-Lyme.

B2 (General Industrial)

- 6.5.15 The range of hectareage that is potentially available for B2 use over the next 16 years suggests that there is sufficient supply of land for this use in Newcastle-under-Lyme. However, when considering the lower figure in the range (the figure that encapsulates the sites where B2 is the preferred use), there is potentially an inadequate supply. In particular, no sites are identified as being appropriate for B2 use in the long term. Table 6.2 suggests that there is a potential under supply of around 22.23 hectares.
- 6.5.16 In terms of meeting the key sectors identified within this use class (Electric Vehicles, Ceramics and Wider Manufacturing), there may be an issue due to the shortage of land available for B2 use in Newcastle-under-Lyme. Within the identified supply, key sites potentially available for B2 use include land off Watermills Road and the Ex

Chesterton Gasworks. However, access at both sites is a key delivery constraint, which may restrict the potential for development.

B8 (Storage and Distribution)

- 6.5.17 Over the remainder of the Core Strategy there is seemingly an adequate numerical supply of land appropriate for B8 use within Newcastle under Lyme, with the Peacock Hay site at Chatterley Valley being critical.
- 6.5.18 In reality in the short term, however, there is a shortage of sites appropriate for B8 use. The medium/long term position is also challenging. The 44.28 hectare site at Chatterley Valley Phase 2 (Peacock Hay) is known to have access and abnormal site engineering costs (likely to be over £10 Million according to Newcastle under Lyme Council).
- 6.5.19 New potential sites on Green Belt land have been initially assessed around Chatterley Valley at the A34/A500 junction. Whilst these sites are in an attractive location, their development feasibility has not been fully assessed. It can be reasonably anticipated that there will be access, services and other constraints here and the promotion and allocation of such sites through the planning system will also present considerable risk. At this stage therefore, it is not intended to include them within the portfolio of sites because of their Green Belt status. More commentary on potential Green Belt release is set out in paragraph 7.3.
- 6.5.20 The delivery of land for B8 use could also be supplemented at the Indesit site if planning is consented.
- 6.5.21 In terms of meeting the key sector identified for this use class (Logistics) the lack of deliverable sites (assuming nil public sector intervention) across the plan period in Newcastle-under-Lyme for B8 restricts the ability to meet this need.
- 6.5.22 Our assessments point to the need to consider the allocation of new land for B8 and B1c and B2 uses to meet future need and demand, if sites at Indesit and Blythe Vale are not delivered.

6.6 New Employment Sites

Stoke-on-Trent

- 6.6.1 The area is mostly urban and the overall medium/long term supply is generally considered to be constrained in terms of market attractiveness and deliverability. The forward strategy critically will need to tackle and remove these constraints, particularly in relation to the better located sites, so demand/need can continue to be met.
- 6.6.2 In terms of new sites, it is anticipated that this could be satisfied through a combination of sites in existing use, which are likely to become available for redevelopment as windfall sites as part of a continuing restructuring of the local economy, the Indesit/Blythe Vale sites and considering greenfield and Green Belt locations.

Newcastle-under-Lyme

- 6.6.3 The review of the stage 2 site appraisals has exposed a more constrained and limited supply of available employment land across several sectors. Market engagement suggested a need to bring forward large employment sites in the A500 corridor towards the M6.
- 6.6.4 Three new greenbelt sites have been considered during the stage 2 site appraisals, two close to the A34/A500 junction and one on land adjacent to Cemetery Road. The former sites are well located close to Chatterley Valley and scored fairly well in the appraisals but are within the green belt and a more detailed site search and feasibility assessment would need to be undertaken in this general location in order to fully assess the suitability and deliverability in planning and physical terms before such sites are promoted through the planning process.
- 6.6.5 The Cemetery Road site is also located within the Green Belt. Whilst the site is relatively attractive and generally suitable for employment development, it is not likely to be viewed as a strategically vital employment site. The market view is that the site is too far removed from the A500/A50/M6 trunk roads, and even though the A525 (Keele Road) leads directly into Newcastle Town Centre, it does not lead anywhere important (in market terms) to the west. There is a requirement to release green belt land for employment allocations partly on a quantitative need (i.e. employment land targets exceed availability) but also because the site in question is clearly a natural employment growth location. It is unlikely that the Cemetery Road site would meet either of these criteria at this stage given the sizeable existing supply at the Science Park. This may of course change if the supply at the Science Park is rapidly taken up.
- 6.6.6 The overall outcome of the Stage 2 site appraisal exercise is that it is highly likely Newcastle under Lyme Council will need to consider new allocation of land (greenfield or greenbelt) for employment purposes in order to meet demand and need over the plan period. The issues behind pursuing green belt release in Newcastle are detailed further in paragraph 7.3.
- 6.6.7 Chapter 8 sets out policy recommendations to enable the council to respond to the deficiencies in supply.

6.7 The Proposed Portfolio

- 6.7.1 The proposed portfolio of sites is shown in map form in figure 3 in Appendix 5. To help as a guide for developers and potential investors the map distinguishes the likely sequencing of land by shading sites according to their adjudged delivery timescales as follows:
- Green = Delivery within 0 to 6 years
 - Amber = Delivery within 6 to 11 years
 - Red = Delivery within 11 to 16 years.

- 6.7.2 In our assessment, the total area of land that is deliverable in Stoke-on-Trent within the short to medium term is circa 100 hectares and in Newcastle-under-Lyme, is under 50 hectares⁵.
- 6.7.3 In terms of contributing towards the suggested revised supply targets set out in Chapter 4 , the total land therefore deliverable (i.e. without obvious material constraint) in Stoke-on-Trent represents a supply of 7 years using a take up rate of 14.4 hectares per annum which is needed to deliver the revised target of 230 hectares by 2026 . Within Newcastle-under-Lyme, the total area of land deliverable represents a supply of 5 years.
- 6.7.4 There is clear potential of there being a shortfall of sufficient, quality employment land in the medium to long term in both Stoke-on-Trent and Newcastle-under-Lyme to meet the suggested revised supply targets for both areas.
- 6.7.5 To ensure that sufficient sites are delivered in the medium to long term, there will be a need to address specific deliverability issues relating to key sites to ensure that employment uses can be delivered throughout Stoke-on-Trent and Newcastle-under-Lyme. The key will be to prioritise public resources, action and developer activity at these sites.
- 6.7.6 In addition and in response to supply deficiencies identified the portfolio should consider 'adopting' the site at Indesit and Blythe Vale.
- 6.7.7 The appraisal pro formas, maps and photographs for each of the sites within the proposed portfolio can be found in a separate accompanying report of July 2011 titled *Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council Joint Employment Land Review Employment Sites Portfolio – Appraisal. Pro Formas, Maps and Photographs*.

⁵ The sites that comprise the total land that is deliverable in the study area within the short to medium term are identified with an asterisk in the tables in appendix 6.

7 Delivery and Intervention Strategy for Site Portfolio

7.1 Introduction

7.1.1 There are three ways in which genuinely deliverable employment land can be made available. Firstly, investing in the removal of the sites' constraints can bring existing undeliverable sites forward. Secondly, new employment land can be "created" by either removing land from the Green Belt or reallocating green field sites. Finally appropriate sites outside the administrative areas of Stoke-on-Trent and Newcastle-under-Lyme, but close to the authorities' workforce can be included within the calculation of these authorities' available employment land. Each of these ways of increasing the supply of genuinely available employment land is explored below.

7.2 Removing Constraints from Existing Sites

7.2.1 The previous sections of this report have identified that there is highly likely to be a shortfall of quality employment land in the medium to long term in both Stoke-on-Trent and Newcastle-under-Lyme. The position in Newcastle is more severe. In the short term in the next 6 years the appraisal shows that the deliverable supply is approximately 48 hectares of which 29 hectares are at Keele Science Park with the remaining sites comprising small scale opportunities with only the Lowlands Plot (6.52 hectares) at Chatterley Valley representing a quality site of significant size.

7.2.2 There are a large number of potential sites in Stoke however many of these are unlikely to be delivered and made available for development, unless action is taken to remove constraints that are making them unattractive to users, developers and investors. These constraints include poor access, difficult topography, contamination and lack of key services. Prevailing development values in the Potteries area are such that private sector developers are unable to meet the high costs of tackling these constraints on a number of sites. Public sector intervention will therefore be required if these sites are to be brought forward for development. Public sector funding at the current time is severely constrained, but there are funding opportunities and potential mechanisms albeit limited for assisting delivery of sites. These are discussed below.

Regional Growth Fund

7.2.3 This Fund, the first round of bidding, which was completed in January of this year, has replaced funding that was available from the Regional Development Agencies. The first round was limited to private or private/public bids with a grant requirement of at least £1 million. The emphasis of the Fund is on the creation of jobs. On 13th April 2011, the Government announced the results of this first round. None of the projects submitted that were located within the Stoke-upon-Trent and Newcastle-under-Lyme area were successful.

7.2.4 A new round was launched on the same day with applications to be submitted by the 1st July this year. There are a number of sites that could benefit from this fund, to

improve constraints and improve the sites' marketability, including sites at Chatterley Valley, at Etruria Valley and the sites at Blythe Vale and Blythe Bridge. Any bids, chances of success would be improved if made through the areas Local Enterprise Partnership. However, it is expected that most of the money remaining in the fund will be exhausted by this second round. If there is any remaining a third round will be launched but any funds available are likely to be small.

- 7.2.5 It is highly unlikely that any of the projects that may come out of this study will be in a position for submission under either Rounds 2 or 3 of Regional Growth Fund. However it is likely that either this funding scheme will be continued or another put in its place. There will be lessons to be learned from the current bidding rounds which will be important in possible future bids: the importance of job creation, a private sector lead (or at least a public/private joint venture and the central importance of submission by a Local Enterprise Partnership to give a strategic view.

European Regional Development Fund

- 7.2.6 The current round of European Regional Development Fund (ERDF), 2007-2013, addresses key areas such as innovation, small firm formation and training. This source has been used to assist and create a number of business centres within the study area as well as to assist development at Keele Science Park. It is understood that funds are still available from this source although finding public sector match funding the current environment of public sector cutbacks may be problematic.

Enterprise Zones

- 7.2.7 The Coalition Government has recently announced the creation of 21 Enterprise Zones and has invited Local Authorities to submit bids. These Zones will offer reduced planning restrictions, a discounted business rate worth up to £275,000 over five years for firms that move into the area, as well as access to superfast broadband. Unlike the previous Enterprise Zones set up in the 1980's, there are as yet not enhance capital allowances, which drove investment in the earlier Enterprise Zones, although the Chancellor has said he will look at this for plant and machinery. In addition the Chancellor will also allow Local Authorities to retain all business rate growth within the Zone to support their economy.
- 7.2.8 Enterprise Zones will not in themselves address the issue of removing development constraints from sites, although theoretically the Councils could raise funding, which could be used to tackle infrastructure, contamination and ground condition issues, based on the revenue they will obtain from retaining Business Rates. The Enterprise Zone mechanism will be important in attracting business to the area, however other funding, such as the Regional Growth Fund, is likely to be required to address the sites problems. There is also an issue that the creation of an Enterprise Zone will not create any net new employment or business as firms move accommodation to take advantage of the benefits on offer, although it could be argued that by moving to new premises the business is improving its efficiency and competitiveness. An Enterprise Zone approach may be appropriate for the corridor of sites stretching from Etruria Valley to Chatterley Valley.

Community Infrastructure Levy

- 7.2.9 The Community Infrastructure Levy (CIL) came into force in April 2010. It allows local authorities in England and Wales to raise funds from developers undertaking new building projects, including residential, retail, leisure and employment, in their area. The money raised can be used for a wide range of infrastructure that is needed as a result of development. This could include improvements to the highway network, flood defences, schools, parks and green spaces.
- 7.2.10 CIL takes the form of a tariff per square metre (sq. m.) of floorspace. The level of the tariff is set by the local (or unitary) authority (the ‘charging authority’) based on the needs identified in its infrastructure plan, but also tested to ensure that it will not affect the viability of developments. Payments will be collected into a fund to pay for infrastructure. CIL is not intended to pay for all infrastructure – it is intended to fill the funding gaps that remain once other sources of funding have been explored. CIL can provide funding for some of the works that will be required to bring employment sites forward. It also has the potential to discourage developers and investors if the tariff is set to high or encourage investment if the tariff is lower than those of adjoining boroughs. Both Councils need to approach the setting of the tariff with great care.

Local Enterprise Partnerships

- 7.2.11 A Local Enterprise Partnership (LEP) has been established for Staffordshire and Stoke on Trent. The Government has made clear that LEPs should be a genuine private/public sector partnership chaired by a leading business person and be business focused. As yet there is no indication what funding, if any will be available to LEPs. However they do represent conurbation wide areas, have public/private sector involvement and are seen by the Coalition Government as a replacement for the Regional Development Agencies. They will clearly be an important body in addressing conurbation wide employment land issues.

Mixed Use Development

- 7.2.12 On those sites currently allocated for employment uses but where the costs of access or decontamination, etc are too high, the Councils could consider allowing subject to other planning considerations, a higher value use such as retail or residential, on part of the site. This could address the barriers to the sites development but ensure that a level of employment use was retained on the site.

Tax Increment Funding

- 7.2.13 Tax Increment Funding (TIF) is a new funding device pioneered in the US which is designed for major capital projects. Funding is raised through a bond based on the increase in rateable value generated by the new development. This is ideally suited to higher value uses such as retail or major mixed use schemes. TIF is being used in Scotland, but legislation is required to open this approach to local authorities in England. It is doubtful whether this mechanism is appropriate to purely employment areas as this has not yet been tested. Within Scotland, the former steel works at

Ravenscraig in Lanarkshire is subject to a TIF scheme. However in addition to employment uses the scheme also includes residential, retail and leisure uses. TIF should be viewed as a longer-term potential option.

Local Asset Based Vehicles (LABV)

- 7.2.14 This approach depends on the local authority contributing land and premises to a development company in which it has a fifty/fifty shareholding with a private sector partner (either a developer or investor). The private sector partner matches the public sector land and premises contribution with cash. The total assets of the company can then be used to raise bank funding. With these assets the company can then tackle a programme of regeneration. Both Councils have considerable experience of joint venture partnerships with the private sector. The LABV approach gives the public sector more control over the company's development programme and a share in the profits of the company which can then be reinvested. This approach is obviously dependant on the public sector partners willing to contribute land and premises to the vehicle. It is also possible, to increase the asset base and development programme of the vehicle, for a number of public sector bodies to jointly participate.
- 7.2.15 Funds will clearly be limited in the short term and mechanism such as Enterprise Zones and Regional Growth Funding will be competitive and will have a greater chance of success if they are part of a strategic programme being pursued by a Local Enterprise Partnership. It will also be incumbent on Newcastle-under-Lyme and Stoke-on-Trent Councils to prioritise the sites that they wish to bring forward, to develop clear strategies and to pursue these with vigour.

7.3 Releasing Green Belt Land and allocating Greenfield to meet need

- 7.3.1 Policy on Green Belt is currently set out in Planning Policy Guidance Note 2, 'Green Belts' (PPG2), published in 1995 (amended in 2001). Local planning authorities must have regard to PPG2 when preparing plans. PPG2 establishes a presumption against inappropriate development on Green Belt. If a proposal for such development is received, the local planning authority should consider whether any harm would be outweighed by other considerations, and whether very special circumstances exist to justify planning permission.

PPG 2: The Core Policy (Section 3.4)

- 7.3.2 The construction of new buildings inside a Green Belt is inappropriate unless it is for the following purposes:
- Agriculture and forestry (unless permitted development rights have been withdrawn);
 - Essential facilities for outdoor sport and outdoor recreation, for cemeteries, and for other uses of land which preserve the openness of the Green Belt and which do not conflict with the purposes of including land in it;

- Limited extension, alteration or replacement of existing dwellings;
 - Limited infilling in existing villages, and limited affordable housing for local community needs; or
 - Limited infilling or redevelopment of major existing developed sites identified in adopted local plans.
- 7.3.3 In 2010 the Coalition Government stated that they will publish and present to Parliament a consolidated national planning framework covering all forms of development in due course. In the interim the Coalition Agreement promises to ensure that the protection of Green Belt by local planning authorities is maintained (Conservative Party policy published pre-election in February 2010 explicitly states 'we will maintain Green Belt protection'). Various subsequent statements by Ministers have clarified that they did not like the previous regime's use of Regional Spatial Strategies which had the power to force Green Belt reviews on local areas; and that they are committed to Green Belt decisions being made at the local level in the future.

Current Views on Green Belts

- 7.3.4 Green Belts have long divided opinion on their effectiveness, typically with many planning academics, house builders and business leaders criticising them as artificial blocks on development whilst environmentalists and local communities in proximity to Green Belts generally hold them in very high regard, making any proposals for relaxation of regulations highly emotive. As recently as 2010 a report by Natural England and CPRE (Green Belts: A Greener Future) concluded that 'Green Belt designations are fulfilling their purposes in safeguarding the countryside from encroachment, preserving the character of historic towns and assisting with urban regeneration'.
- 7.3.5 In stark contrast, in February 2011, the Institute of Directors proposed measures to stimulate economic growth without cost, including the following recommendation: 'Approximately 90 per cent of the population live on 9 per cent of the land in the UK. Expected population growth means ever increasing pressure for higher urban densities. There is an opportunity to release a substantial portion of green belt land for development. This could help boost the construction sector and economic recovery in the short term, whilst improving urban congestion in the long term. Greater land release could also lead to lower land and house prices and greater affordability.'
- 7.3.6 Planning Minister Greg Clark's statement in November 2010 when discussing the Localism Bill perhaps indicates most succinctly what the future holds for Green Belts: 'One of the real opportunities in the Localism Bill is to remove the threat to the Green Belt that came from the regional spatial strategies. The concern up and down the country that Green Belts could be deleted through those strategies will be buried once and for good by the Bill.'
- 7.3.7 It is therefore clear that Green Belts have high-level political support and future alterations will be increasingly subject to localised scrutiny, which in light of historic tendencies for local communities to typically exhibit 'anti-development' views suggests that any proposals to relax boundaries will be met with significant resistance.

The Green Belt in Newcastle's Core Strategy

- 7.3.8 Newcastle-under-Lyme (NuL) and Stoke-on-Trent (SoT) have prepared a joint Core Strategy. This was done to: 'ensure that policies are consistent across the urban area to facilitate the delivery of conurbation wide regeneration programmes. It will help to ensure that we effectively intervene in the operations of the free market, which have successively failed significant parts of the communities of NuL and SoT, and a balance is achieved in terms of development pressure. It also makes sense because in reality the way we live our lives, the housing market and local economy do not respect administrative boundaries.'
- 7.3.9 Whilst this is a commendable approach, in reality political and practical factors intervene and administrative boundaries still dictate the strategising process; consequently the Core Strategy area comprises of two relatively small and constrained (in geographical terms) authorities, and not the true economic and housing market which undoubtedly includes much of Staffordshire Moorlands, northern elements of Stafford, and small parts of neighbouring counties, particularly Cheshire (East).
- 7.3.10 The Core Strategy area is highly urbanised through the majority of the SoT administrative area and to the east of the NuL area. The North Staffordshire Green Belt (NSGB) arcs round the urban area from the northern tip of SoT round the west of NuL, running close to the existing extremities of development. Virtually the entire northern quarter of Stafford Borough (i.e. the southern boundary of NuL and SoT) is also designated as Green Belt.
- 7.3.11 Paragraph 5.139 of the Core Strategy acknowledges that: 'any development within the NSGB will be in accordance with policies set out in national planning policy –PPG2 and local development plan policy.' All Green Belt areas are also included in the Core Strategy's Rural Area Spatial Strategy. This recognises the importance of the rural areas as a resource to NuL whilst noting that some limited development will occur: 'The level of new housing development required to enable North Staffordshire to continue to grow and prosper could easily be accommodated on existing brownfield sites. However to achieve genuinely sustainable rural communities and economies, it will be necessary to enable limited new housing to meet the needs of people working within the rural areas. Not to do so would result in a static and ageing population, increasing social exclusion, increased pressure upon social and health services, and economic stagnation. However, the strategy is clear that there is no scope for development of a scale beyond that required for natural growth and in locations where there are very few local services.'
- 7.3.12 Whilst it must be noted that the Rural Area Spatial Strategy also covers rural areas that are not Green Belt, the general presumption is that only development that meets the needs of the existing rural populace (approximately 21% of the total NuL population) would conceivably be supported. The rationale for this is that the Core Strategy's Sustainability Appraisal demonstrated that limiting rural growth to meet identified local requirements will provide the most effective approach towards

minimising any undesirable impacts upon international, national and local designated wildlife habitats and geological features.

No Way Forward?

- 7.3.13 Given the language of PPG2, the Joint Core Strategy, the Coalition Government and the likely impacts of the emerging Localism agenda the allocation of a Green Belt site for employment use seems highly unlikely. However, assuming a quantitative need for employment land which exceeds available levels has been proven by an independent Employment Land Study; and that no future allocations can be found that after market testing show ‘a reasonable prospect of take up during the plan period’ (as required by Planning Policy Statement 4); a local authority in this position clearly faces a significant issue which threatens long-term economic sustainability.
- 7.3.14 During 2010 a Greater Manchester-wide employment study considered both the local and strategic issues facing the ten constituent Boroughs. Invariably some had significant employment land resources whilst others were severely constrained either in terms of quality (such as Salford, outlined in Case Study 2 below); or in some cases quite simply in terms of basic quantities of land available (such as Oldham, the first case study outlined here):

Case Study 1: Oldham – Anywhere But Green Belt

- 7.3.15 The northern Greater Manchester borough of Oldham is significantly constrained in terms of available employment land. The 2008 Employment Land Review (ELR) noted that: ‘projected land requirements forecast Oldham will need up to 132.8–137.6 hectares of employment land. Assuming that the Development Plan carries forward the existing undeveloped good and average allocations of 40.75 hectares [i.e. the reasonably deliverable sites], this leaves Oldham with a shortfall of up to 92.05–96.85 hectares of employment land for the plan period. This may be an unachievable amount of land to consider allocating for employment uses due to the limited supply of land available/developable in the Borough. Over half of the Borough is designated as Green Belt; there are 546 hectares of land designated as protected areas of nature conservation and 331 hectares of protected open land.’
- 7.3.16 The Oldham ELR concluded that future Council policy needed to focus on improving public transport linkages to major employment hubs in neighbouring boroughs (such as Kingsway in Rochdale, Ashton Moss in Tameside, and Central Park in Manchester, often miles from Oldham’s most isolated neighbourhoods). However it was noted that doing so risked Oldham increasingly becoming a ‘commuter’ borough. Faced with this severe potential shortfall in future employment land Oldham Metropolitan Borough Council conducted a Call for Sites. A significant number of subsequent representations sought development in the Green Belt. Yet the response of the Regional Planning Body at the time was that: ‘Across Greater Manchester there was no need for any substantial strategic change to Green Belt.’ In effect the ELR’s view that a local authority should look at sites beyond its boundary to fulfil employment needs before seeking development in the Green Belt was supported by the regional authorities. Following the abolition of the regional tier of governance, the emerging sub-regional

strategy for Greater Manchester is expected to provide greater clarity on the role of the Green Belt – but at present Oldham Council remains committed to providing employment land solutions that do not involve Green Belt relaxation.

Case Study 2: Salford – Proposed Green Belt Swap

- 7.3.17 The City of Salford, a local authority with a similar distinct urban-rural split as NuL, has produced a draft Core Strategy that advocates the release of 40 hectares of Green Belt land at a site named Barton, adjacent to a major ongoing development proposal known as Port Salford. In response to doing this Salford proposes designating 40 hectares (at least) of new Green Belt in a more rural area known as Little Hulton. Salford's Draft Core Strategy states:
- 7.3.18 'The vast majority of the city's development needs can be satisfied within the urban area. However, there is a need to release a small amount of Green Belt land at Barton in order to meet the city's employment land needs. If this land were not released then Salford would not be able to achieve its economic growth objectives, instead seeing a reduction in the amount of industrial and warehousing development in the city and being heavily reliant on older employment areas that will find it increasingly difficult to attract investment and modern businesses. The release of this part of the Green Belt is therefore considered essential for the future prosperity of the city and its residents.'
- 7.3.19 A notable element of Salford's proposal is their view that this designation swap does not constitute a 'substantial strategic change' – the terminology used in PPG2 and former North West regional guidance – but only a local detailed boundary change. The Draft Core Strategy states:
- 7.3.20 'The (existing Green Belt) land forms a very small part of the much larger area of Green Belt that separates Salford's urban area from settlements in Wigan and Warrington, and its development for employment uses would not interfere with that function. The land has a secondary role separating the settlements of Irlam and Eccles, but this is an issue that only affects Salford and is not of any broader strategic significance. The restriction of any Green Belt loss in this location to a maximum of 40 hectares ensure that a significant landscape gap was retained between Irlam and Eccles, maintaining this secondary function of this part of the Green Belt and not conflicting with any of the five purposes of including land in the Green Belt that are identified in PPG2.'
- 7.3.21 Salford City Council has explored other options in detail, including releasing the 40 hectares but not replacing them elsewhere in the Borough; and not releasing the Green Belt land at all and seeking employment development on existing brownfield sites, and has deemed neither option as viable in economic or policy terms. Subsequently the Draft Core Strategy has been assessed in an advisory capacity by a Planning Inspector. He concluded that whilst the Council explained the background to the employment land requirement figures he remained of the view that a cogent argument could be mounted which gave more weight to protection of the Green Belt than the meeting of employment land 'targets' (as they are invariably open to debate

on their accuracy). The ultimate decision would need to be based on clear evidence which showed that a Green Belt release was the 'best alternative'. The Inspector was of the view that Green Belt release would be especially difficult to justify since the Council was releasing 130ha of existing employment land elsewhere to other uses. However, the Council stated that it had clear evidence to show that this land was no longer suitable for employment purposes (it was not reasonably deliverable) and is content to proceed with its view that a land swap is indeed the 'best alternative'.

Conclusions

- 7.3.22 Whilst both Oldham and Salford have spent many years now considering the strengths and weaknesses of allocating Green Belt land for employment, only Salford has progressed with proposals to release land. Partly this is due to an ability to find a realistic replacement site to ensure no overall loss in Green Belt hectareage, but primarily it is based on the belief that the site being released is a genuinely strong location for employment use, situated as it is near key arterial routes and existing development areas – whereas in Oldham Green Belt areas tend to be 'green' – mainly undulating rural areas situated away from the Greater Manchester conurbation and the natural locations for economic growth. Put simply, the immense technical difficulties of releasing a site are more easily justified in Salford, as they need to be to make the process worthwhile. Needing land because targets suggest it is needed is not as remotely a credible argument as needing land because targets suggest it and the site in question has genuinely excellent employment potential.
- 7.3.23 The Salford example indicates that there remains a presumption from the Planning Inspectorate that Green Belt should be protected in its present location especially when the argument otherwise is based on theoretical figures, as employment land targets are by necessity. However Salford (and other Councils) remains committed to the process of 'swapping' Green Belt sites in the interest of unleashing premium employment locations. It is clearly necessary for any such move to be enshrined in the Core Strategy and have therefore gone through the rigorous public and examinations this involves. Many local authorities are now beginning their Core Strategy Reviews and often these recognise that significant changes are required to the original Core Strategy to take account of rapidly changing economic conditions at the micro- and macro-levels, emerging new planning legislation and the general range of changes that occur in any locality over a number of years.
- 7.3.24 Therefore it appears the only realistic opportunity for NuL to potentially allocate employment development in the Green Belt requires the following:
- i) Clear evidence that there is a need over the plan period for new employment land;
 - ii) Clear evidence that the current portfolio of employment sites, and/or potential new designations outside of the Green Belt, are not realistically able to deliver this proven need during the plan period;
 - iii) A comprehensive site assessment that indicates why a specific Green Belt site is likely to deliver the required land;

- iv) A credible substitute site (which may include brownfield land) of similar or greater size to the site to be released from Green Belt that can be used as a direct replacement;
- v) Support of the proposed swap in future iterations of the Core Strategy.

7.3.25 Given that, like economic and housing market boundaries, Green Belts rarely follow specific administrative boundaries, there is no theoretical imperative for the substituted site to be in the same local authority as the released site (although clearly the two sites need to be of reasonable proximity). As the emerging Local Enterprise Partnerships (LEPs) are (in theory) specifically based on meaningful economic areas rather than arbitrary administrative boundaries it is the Government's view that: 'they will be best placed to determine the needs of the local economy along with a greater ability to identify barriers to local economic growth.' Arguably the need to find a substitute Green Belt site – should no obvious site be available within the local authority's boundary - constitutes a clear barrier to wider local economic growth, and raises the possibility of larger or more rural adjoining local authorities within the LEP assisting constrained neighbours in meeting their Green Belt re-designation targets for the greater economic good.

Greenfield (non Green Belt) Locations

7.3.26 The study has not identified any potential greenfield (non green belt) sites, however should these be identified subsequently by the Local Planning Authorities, the allocation of greenfield land would be an appropriate economic and planning policy response given the findings for the appraisal of employment land and the likely need to identify new sites in both authority areas to satisfy forecast demand and need.

Sites Outside the Study Area

7.3.27 The review of the Green Belt and case studies outlined above (as well as the experience of the consultancy team in other localities) indicate that the release of Green Belt land is extremely problematic and generally to be viewed as a 'last resort'. The exploration of potential development sites outside the administrative boundary of the constrained authority should occur before de-allocation of Green Belt is considered.

7.3.28 There are two significant sites which lie close to the A50 and adjoining the Stoke-on-Trent administrative area: The former Indesit factory site at Blythe Bridge (23.9 hectares (59 acres)) within Stafford Borough; and the nearby Blythe Vale site (46.8 hectares (117 acres)) within Staffordshire Moorlands District. Both sites are peripheral to the main centres of population of the local authorities they lie within and therefore there is no urgency within these authorities to bring them forward – although both authorities have confirmed through recent consultation that they intend to protect the existing employment allocations each site holds.

7.3.29 It is important to Stoke and Newcastle to work closely with these authorities so as to stress the need to bring these sites forward for appropriate development in support of

- the Core Strategy at the earliest opportunity. A conurbation wide approach may be the most appropriate way of approaching this issue, through the LEP. As has been noted through this report Stoke and Newcastle are generally recognised by the commercial market as being a single market entity – therefore the greater proximity of these sites to Stoke than Newcastle should not be viewed as a significant issue even if it is Newcastle that has the more apparent urgency for new allocations.
- 7.3.30 The two sites offer a combined total of over 70 hectares of readily developable employment land close to a major road artery that provides good linkages to the majority of the conurbation.
- 7.3.31 Both sites have existing employment allocations (B1, B2 & B8 at the former Indesit Works; B1 and B2 at Blythe Vale) and are well known and generally highly regarded by major commercial developers. Whilst the combined gross land supply of Stoke and Newcastle to 2026 is overall above demand projections, the practical deliverability and market appeal of Blythe Vale and the former Indesit Works will be considerably stronger than much of the employment land portfolio in Stoke and Newcastle. It is therefore realistic to assume pressure to develop these sites (from developers seeking space in Newcastle and Stoke rather than Stafford or Moorlands) will be stronger than for much of the potential land offer within the conurbation's boundaries.
- 7.3.32 In 2010 the Employment Land Review in Stafford Borough projected a substantial decrease in the overall levels of employment over the 2006 to 2026 period, and predicted a fall of 9,800 jobs (a decline of 14.4%). The older Staffordshire Moorlands Employment Land Review (2006) noted at that time Moorlands was receiving only around 3% of all enquiries made to Instaffs across the County. Phase 1 of the Blythe Vale site (a 5.9 hectare (14.5 acre) element) was anticipated to be developed imminently at the time of the Review, but by April 2011 no development has occurred. Whilst recognising that this review has not analysed the Moorlands or Stafford economies in any detail it is fair to assume from the lack of developer interest either site has witnessed, and the challenges facing the two local economies at present, neither Blythe Vale nor the former Indesit Works is likely to be developed out in the short-term. Furthermore, their remote locations with regard to key population centres in their own boroughs, geographical proximity and strong transport links to the North Staffordshire conurbation; and the evidence from this review suggesting that North Staffordshire is likely to face a medium to longer-term requirement for land unlikely to be replicated in Stafford or Moorlands, suggests that logically they should be – at least in some proportion – viewed as contributors to Stoke and Newcastle's future land supply.
- 7.3.33 Whilst logic dictates the relatively arbitrary nature of administrative boundaries cannot be allowed to artificially divide a functioning market area, it is also recognised that the 'merging' or 'sharing' of employment land resources between authorities – especially those with different Core Strategies – is challenging. However it must also be noted that this review concludes the logistical difficulties of pursuing effective inter-authority operating structures will almost certainly not be as challenging and costly (in direct resource or public relations terms) as seeking to de-allocate Green Belt land.

8 Policy Recommendations

- 8.1.1 In response to our findings and issues identified within this report above we identify a series of policy recommendations below in order to adequately provide for employment land needs and to support the implementation of the Core Spatial Strategy over the plan period.

Recommendation 1 – Site Allocations DPD

- 8.1.2 We recommend that the findings and recommendation of this ELR are used to inform emerging Site Allocations DPD's.

Recommendation 2 – Green Belt and Greenfield Review

- 8.1.3 We recommend that there is no need at this stage to amend the Core Strategy or for the active pursuit of Green Belt employment site alternatives. This is due to the reasonable supply of employment land identified in the short term across the study area and the supply of sites at the former Indesit factory site at Blythe Bridge (23.9 hectares/59 acres) within Stafford Borough; and the nearby Blythe Vale site (46.8 hectares/117 acres) within Staffordshire Moorlands District under their existing consents. However there will be a need to review the employment land requirement when the Core Spatial Strategy is reviewed and the need to bring forward Green Belt sites may need to be explored more rigorously at that time, although both authorities may need to review potential greenfield sites before that time.

- 8.1.4 The progress of the Blythe Vale and Indesit sites should however be carefully monitored over the next 5 years and where it is evident that delivery of these sites for B1c, B2 and B8 uses is not forthcoming for whatever reason and that employment needs are at serious risk of being unfulfilled then it is recommended that the authorities actively consider greenfield and Green Belt alternatives in accordance with requirements set out in paragraph 7.3.24 for the medium and long term requirement i.e. for the period 2016 to 2026 and beyond.

Recommendation 3 – Hanley CBD

- 8.1.5 We recommend that Stoke City Council continue to pursue the development of a Central Business District within the City Centre at Hanley.
- 8.1.6 We support Stoke City Council's plans to develop a Central Business District (CBD) in the City Centre at Hanley. The introduction of large numbers of office workers to the centre will create a major boost to the health, viability and environment of the city centre - an important component in the regeneration of Stoke and the North Staffordshire area.
- 8.1.7 Establishing a new office quarter in the city centre will take time and significant private sector scepticism over deliverability remains. It is unlikely that private sector occupiers will have the confidence to sign up for space in the scheme prior to its development. It is also unlikely that the developers of the scheme will build units speculatively unless

there is a large public sector pre-let of space or that the public sector support the development with a rental guarantee or by taking a headlease. In the current North Staffordshire property market, with bank funding being limited and difficult to obtain and in the light of major public sector cut backs, the regeneration of the CBD is likely to be slow and will need significant public sector support to kick start a first phase of office development and attractive public realm which would enhance the prospects to secure private sector occupiers.

Recommendation 4 – Festival Park and Etruria Valley

- 8.1.8 Prior to the development of the CBD, the priority of Stoke-on-Trent City Council and Newcastle Borough Council is to attract and accommodate office development on sites in the City Centre and Newcastle Town Centre.
- 8.1.9 We recommend that the remaining developable 21.7 acres (sites 9764; 2065 and 6275A) at Festival Park should be treated as a strategic resource for office occupiers for which Hanley and Newcastle under Lyme centres cannot provide a sequentially preferable site.
- 8.1.10 As mentioned above, the development of the CBD in Hanley is likely to take several years to come to fruition. In the meantime it is imperative that potential new office proposals are not lost to the area because of the lack of well-located and developable office sites.
- 8.1.11 The Festival Park site is already favoured as an office location by the private sector, however the wholesale unrestricted designation and use of this site and the adjacent Etruria Valley site measuring 97.8 acres (2421;2057A;2057B) for B1a offices is likely to prejudice efforts to promote and secure offices within Hanley CBD. However, some office occupiers do not wish the type of space or the location that would be offered within the CBD and would prefer a lower cost, more basic form of accommodation in a location close to the strategic road network with adequate parking. These occupiers must be catered for and the land at Festival Park and Etruria meets their requirements.
- 8.1.12 A careful balance therefore needs to be struck to ensure that city and town centre regeneration efforts are supported by planning policy. It is clearly difficult to identify types and sizes of occupiers appropriate to CBD and to out of town locations. To restrict development at one location to encourage occupiers to move to another risks the loss of investment to competing centres. North Staffordshire needs to attract occupiers by adopting a positive strategy of offering a choice of versatile space complemented by good facilities and servicing infrastructure.
- 8.1.13 To underpin this positive approach we recommend the 21.7 acres of developable employment land at Festival Park be made available for office development in the short term, i.e. within the next three years and that at the end of that period a review be carried out of changes in the office market, progress on the CBD scheme and the take up of space at Festival Park and other locations. In the light of these changes, the need for any restrictions on out of centre office development can be considered and any future balance between the two locations set. Given current market conditions and

the likely rate of development of the CBD it is unlikely that there would be any threat to the development of the CBD in that period and that any footloose office development would not be lost to the area.

Recommendation 5 – An Economic Area Approach

8.1.14 We recommend that the strategic assessment of employment land to be considered on an “economic area” basis, i.e. at the Staffordshire & Stoke-on-Trent Local Enterprise Partnership level. Key actions that need to be taken into account at this level include:

- The inclusion of the Grindley Lane (Indesit) and Blythe Vale sites as part of Stoke-upon-Trent and Newcastle-under-Lyme’s employment land supply;
- The submission of a bid to Government for an Enterprise Zone. We would suggest the corridor of sites surrounding Etruria Valley;
- The submission to Government of a Regional Growth Fund bid (or equivalent at the time of bidding) to tie in with the proposed Chatterley/Etruria Valleys Enterprise Zone. The funding would be used to assist overcome the constraints to developing these fundamentally well-located sites.

Recommendation 6 – Priority Investments

8.1.15 We recommend that the two Councils identify those key employment sites into which scarce public sector funding is channelled. These sites should include:

- The Chatterley Valley/Etruria Valley Corridor
- Stoke-on-Trent CBD sites and other City Centre and Town centre sites
- Newcastle-under-Lyme town centre sites and Keele Science Park
- Grindley Lane (Indesit) site (if Enterprise Zone)

Recommendation 7 - Community Infrastructure Levy charging

8.1.16 We recommend Stoke-on-Trent and Newcastle-under-Lyme take a joint approach to preparing their Community Infrastructure Levy charging schedule.

8.1.17 Whilst it is a matter of choice for each authority whether to adopt CIL, changes to laws over the use of planning obligations mean that any authority failing to adopt CIL over the next three years could become highly disadvantaged in terms of funding infrastructure.

8.1.18 There will be many challenges to address before CIL will be considered proven to work. Concerns have been raised over issues such as: local competition – i.e. neighbouring authorities become overly competitive trying to entice new development with low CIL charges; and the feasibility of a charge on development in a fragile economic climate. The Government’s response to fears over competition is that local authorities need to work together within their broader economic area as far as possible – clearly with Stoke and Newcastle’s complex economic relationship this is undoubtedly the case.

- 8.1.19 In response to fears over viability, the aim is for CIL charges to be flexible enough in terms of geography, development type and time period, to continually balance the need for infrastructure funding with the need to stimulate development. In reality not only will it be important for Stoke and Newcastle to set fair and reasonable CIL rates, there has to be clarity to the private sector as to why these rates have been chosen and how they relate to specific locations. It would be undermine confidence in, and credibility of, the public sector if sites shared by the two authorities or even in close proximity had significantly different CIL rates and/or a different long-term infrastructure agenda.

Recommendation 8 – Agreed Infrastructure Projects

- 8.1.20 We recommend Newcastle-under-Lyme and Stoke-on-Trent to agree key infrastructure projects to assist the release of employment land in future iterations of their Infrastructure Delivery statement.
- 8.1.21 As evidence of the progress Stoke and Newcastle have made to integrate their strategic objectives the Joint Core Strategy is supported by the Strategic Infrastructure and Planning Delivery statement. This states: ‘Strategic infrastructure planning requires us to identify a flexible framework to indicate infrastructure needs and costs; phasing of development; funding sources and responsibilities for delivery where possible. It is not the end of the road but part of a continuing dialogue with providers as we move to detailed site allocations in other development plan documents. Furthermore, as national planning reforms unfold it will provide a critical starting point for the consideration of the potential application of the Community Infrastructure Levy in the plan area.’
- 8.1.22 Firstly this supports the recommendation above that CIL is viewed holistically between the two authorities, as pooled together it will provide a greater resource for unlocking challenging strategic infrastructure projects. Whilst inevitably housing, waste management, environmental improvements and other issues will also require support, no single issue should carry greater weight than the creation of sustainable employment across the conurbation through investment in key sites.
- 8.1.23 As noted elsewhere in this review Stoke and Newcastle have generally seen more immediately deliverable sites taken forward for employment development in recent years, a process likely to continue in the short-term. However, in the medium to longer-term such sites will become increasingly scarce and, coupled with an anticipated lack of external funding from economic development bodies previously seen in the area, further emphasis will need to be put on promoting ‘self-sufficiency’ in terms of providing genuinely developable employment land. Put simply, Stoke and Newcastle will have to prioritise the use of pooled resources, including CIL, into producing viable development sites for industrial and office use, and future iterations of the Strategic Infrastructure Plan need to recognise and quantify this increased emphasis.

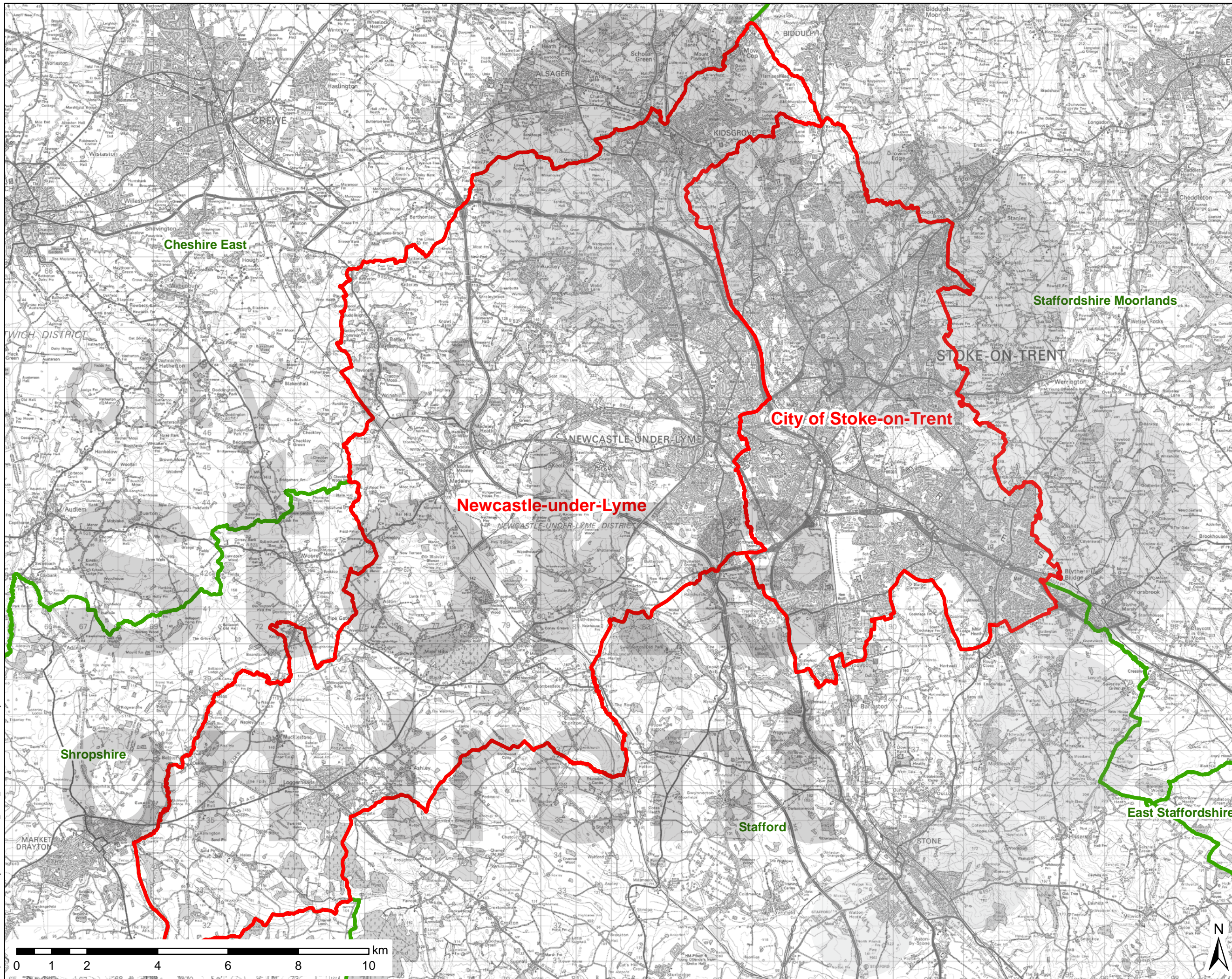
Recommendation 9 – The Portfolio of Sites

8.1.24 We recommend that the proposed portfolio of sites detailed in appendix 6 is adopted.

9 Appendices

9.1 Figure 1: The Study area and administrative boundaries

Date: 8th April 2011
 Filepath: I:\5004 - Information Systems\132341 - Stoke.ELRMXD\Local Authority Boundaries.mxd



NOTES

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Revision Details	By	Date	Suffix
	Check		

Drawing Status: **DRAFT**

Job Title: **STOKE ON TRENT AND NEWCASTLE UNDER LYME EMPLOYMENT REVIEW**

Drawing Title: **STOKE ON TRENT AND NEWCASTLE UNDER LYME**

Scale at A3: 1:100,000

Drawn	Approved
DH	MP

Stage 1 check	Stage 2 check	Originated	Date
			08/04/11

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Drawing Number: **FIGURE 1**

9.2 Appendix 1 - Sites discounted after stage 1 appraisal

Site Reference	Address	Stage 1 Score (out of 25)	Planning Policy History	Site area (Ha)	Comment
Stoke-on-Trent					
2455	Chatterley Whitfield, Bidulph Road, Chell Heath	-	-	12.34	Instructed by SCC not to appraise site
2016D	Bankeyfields, Churchill Pottery Factory, Sandyford	-	-	0.24	Site mostly used for storm drainage purposes for surrounding land
2016C	Bankeyfields, Churchill Pottery Factory, Sandyford	-	-	1.1	Fire Station developed on the site
3140A	Ex Phoenix Timber, Foley Road, Longton	21	-	2.23	Site is subject to planning application for retail
9955	Alexandra Park (Phase 2), Scotia Road, Tunstall	17	-	0.075	Development site close to existing non food retail. Miller Construction undertaking works on site. Site is currently being marketed for retail and leisure use.
3245	Land off Boothan Road, Stoke	14	Former City Plan Allocation	3.08	Site currently in use as a Sainsburys
2137E	Site adjacent to BMW show room, Radial Park	14	Former City Plan Allocation	0.56	Site currently being used by BMW dealer for storing vehicles
1387	Land off Furlong Road, Pitts Hill	14	-	0.96	Residential in character
9430	Fenton Manor Landfill	13	-	14.94	Site currently being used by Tarmac as a long term inert landfill site. Unclear as to when the site could potentially become available.
9478	Severn Trent Depot, Burslem	12	-	2.33	Site currently in use by Severn Trent
9533	Renew Site (PO8) Old Town Street, Northwood	12	Renew site	3.84	Suggested that site can only be considered as a very long term employment opportunity.
2104B	Land off Hawkins Street, Fenton	12	-	1.22	Access not ideal to the site. Highly unlikely to develop developer/occupier interest.

9472	Potential comprehensive redevelopment area, Hinde Street, Hanley	11	-	6.15	Comprehensive redevelopment of the site would be very challenging due to existing occupiers and land assembly
2016A	Land off Marlborough Way, Sandyford	11	Former City Plan Allocation	3.08	Significant access and land level issues
7321	Site at Watergate Street, Tunstall	11	-	2.71	Site contains operational warehouses
2108A	Land at Mossfield Industrial Estate, Adderley Green	11	Former City Plan Allocation	6.91	Significant drainage issues associated with the site.
9465	Potential comprehensive redevelopment area, Kingsway, Stoke	11	-	1.87	Highly questionable whether the case for redevelopment for offices can be met through market interest & support.
9562	Potential comprehensive redevelopment area, Town Road, Hanley	11	-	2.02	Suggested that site can only be considered as a very long term employment opportunity.
2020	Former Tunstall Sewage Works, Tunstall	10	Former City Plan Allocation	10.41	Significant issues relating to road accessibility and internal environment of the site
9575	Land at the end of Newport Lane, Middleport	10	-	3.69	Very poor access to site
9492	Wade Works, Westport Road, Burslem	10	-	1.43	Site has few surrounding employment uses and is more likely to be appropriate for housing.
9970	Sutton Venture Group, Fenton	10	-	3.1	Site currently in use by Sutton Venture Group
9752	Land off Broughton Road, Bucknall	10	-	7.83	Significant issues relating to road accessibility and internal environment
9688	North Staffordshire NHS Outpatients and Pathology, Hartshill	10	-	2.57	Suggested that site is residential in character
1803	Land to the rear of Longus Industrial Estate. Tunstall	9	-	1.51	Tipped site with very restricted access. Surrounded by housing.
9766	Land off Fenton Road, Fenton	9	-	15.31	Isolated site that could potentially become accessible if 2093 is developed. Site could be more appropriate for residential extension to Berry

					Hill Estate.
1095	Land at Redhills Road, Milton	9	Former City Plan Allocation	2.76	Road accessibility, internal environment and non-car access are significant constraining issues.
2015A & 2016B	Land of Holywall Lane and Reginald Mitchell Way, Sandyford	8	Former City Plan Allocation	10.12	Undulating land, which would be a significant barrier to developing the site
9653	Land off Wellfield Road, Bentilee	8	-	3.59	Surroundings are predominantly residential.
9557	St Modwen Land close to Berry Hill Estate	8	-	87.04	Road accessibility and topography issues associated with the site.
9801	Former Meadowstone Works, Redhills Road, Milton	7	-	10.74	Site performed particularly poorly in relation to road accessibility, internal environment and non-car access
Newcastle-under-Lyme					
N432	Land at Victoria Street. Towards the south of Newcastle Town Centre	-	-	0.6	Site too small for employment uses.
N1659	Land at Brock Way. Knutton	-	-	0.16	Site too small for employment uses.
N1490	Lyme Valley Road. Outskirts of Newcastle Town Centre	-	-	0.03	Site too small for employment uses.
N1451	Lymedale Park, Holditch, Chesterton	-	-	26.3	Site under construction
K279	Land off Liverpool Road. Kidsgrove	-	-	0.27	Site too small for employment uses.
N1733	Former MFI, Etruria Way, Basford	18		2.06	Site is likely to be re-let for retail in the long term
N1303	Ryecroft Site, Existing Sainsburys site	13	-	1.1	Site will be vacated by Sainsburys when they move to new location on Liverpool Road. Site most likely to be used for retail.
N1732B	South of Blackfriars Site	12	-	0.6	Site occupied by car dealership and the Greenhouse car park owned by Newcastle Borough

					Council
N1727	Bradwell Youth and Community Centre. Bradwell	10	SHLAA Site	0.69	Site in Use
K277	Caldwell Tavern Public House. Talke	10	-	0.41	Existing Pub
N1681B	Site of former Chestertons ex-servicemen club. Chesterton	9	-	0.41	Site more suited to residential use
K314	Hilltop Business Centre. Talke	9	-	0.84	Part of the site currently in use as a Business Centre. Open land adjacent to site potentially appropriate for housing.
K313	Land off Wilmot Drive. Knutton	9	-	3.92	Land adjacent to site is potentially appropriate for extending Lymedale Cross Business Park. Site more appropriate for residential use.
K278	Site off Congleton Road. Butt Lane	9	-	0.04	Site too small to accommodate employment uses
R128	Old Wharf, Wharf Lane, Madeley Heath	7	-	0.57	Main issue relating to the site is that it is all currently in use.
				Total Number of ha to Discarded	263.76

9.3 Appendix 2 – Scoring of sites passing from Stage 1 to Stage 2 Appraisal

Site Reference	Address	Stage 1 Score	Planning Policy History	Site area (Ha)	Suggested Use Class at Stage 1 (B1a, B1b, B1c, B2, B8 or mixed industrial/distribution use (B1c, B2 and B8))	Comment
Stoke-on-Trent						
9483	Site off London Road, Stoke	-	-	0.26	B1a	Site is currently being redeveloped as a retirement village. However Part of the site has been allocated for B1 use, which will be included in 2010/11 supply of employment land
9270	Moorcroft Building, Burslem	-	-	0.82	B1a	Site contains new office development for Autonet Insurance Group. The site should be included in the total employment land supply for this year, but there is no need to appraise further.
2402	Olympus Engineering, Cliffe Vale	-	-	1.55	B2	Olympus Engineering relocated on site recently. The site should be included in the total employment land supply for this year, but there is no need to appraise further.
2049	Site at Sneyd Hill Industrial Estate	-	-	1.22	B2	Site currently being developed. The site should be included in the total employment land supply for this year, but there is no

						need to appraise further.
2410D	Warehouse Park Zone, Plot 2, Boothen	-	-	2.51	B8	Site developed for B8 use by Dunelm Mill. Include in total employment land supply for this year
2410C	Warehouse Park Zone, Plot 1, Boothen	-	-	1.66	B8	Site developed for B8 use by Dunelm Mill. Include in total employment land supply for this year
2551E	Site off Tony Waddington Place, Trentham Lakes	24	Former City Plan Allocation	0.31	B1a	-
9764	Development Site south of Wades, Festival Park	23	-	1.13	Mixed, B1a	Wades have relocated to the site. Therefore, northern part is unavailable.
2417A & 2552	Development land at Trentham Lakes	23	-	2.14	Mixed	Suggested that sites are combined
2417B	Development Plot off Stanley Matthews Way, Trentham Lakes	23	-	1.35	Mixed	-
2065	Etruria Valley South, Forge Lane, Festival Park	23	Former City Plan Allocation	5.97	Mixed, B1a	-
9763	Land at Festival Court, Forge Lane, Festival Park	23	-	0.5	Mixed, B1a	-
New Site 1	Development Site off Campbell Road, Stoke	22	-	0.82	B1a	Site is located adjacent to the Riverside Office Village.
2551C	Land off Gordon Banks Way, Trentham Lakes	22	Former City Plan Allocation	5.86	Mixed	-
2014B	Land in front of Genesis Park, Chatterley Valley	22	Former City Plan Allocation	1.05	B1a	-

2138	Radial Park, Sideway, Stoke	21	Former City Plan Allocation	24.84	B8	-
7324D	Land south of Tunstall Bypass, Sandyford	21	Former City Plan Allocation	4.04	Mixed, B1a	-
6275A	Land towards south of Media Way, Festival Park	21	Former City Plan Allocation	1.68	B1a	-
2551F	Land off George Eastham Avenue, Trentham Lakes	21	Former City Plan Allocation	0.68	Mixed	
3140B	Ex Phoenix Timber, Foley Road, Longton	21	-	1.75	Mixed, B8	Site is subject to planning application for B2 and B8
2417F & 2417G	Development Land off Eastern Rise, Trentham Lakes	20	-	2.86	Mixed, B8	Suggested that sites are combined
9253	Land off High Street, Sandyford	20	-	0.42	B1c	-
9219	Former Cookson Mathey Site, Whittle Road, Meir	20	-	8.66	B8	-
9954	Former Michelin Tyre Factory	19	-	5.32	B8	-
9432	Site off Whieldon Road, Stoke	19	-	6.85	B2	-
2134	Land at corner of Anchor Road and Park Hall Road, Adderley Green	19	Former City Plan Allocation	1.42	B1c	-
2130	Former Water Works, Uttoxeter Road, Meir	19	Former City Plan Allocation	1.65	B8	-
9912	Land off Stanley Matthews Way, Trentham Lakes	18	Former City Plan Allocation	0.74	Mixed	-

9576	Land off Station Street, Middleport	18	-	1.03	B1a	-
9663	Former John Tams Pottery, Sutherland Road, Normacot	18	-	2.05	B2	-
2413A & 2413B	Land off Dewsbury Road, Fenton Industrial Estate, Fenton	18	-	11.74	Mixed	-
2426A & 2326D	Former Diamond Gimson Works, King Street, Fenton	18	-	2.66	Mixed	Sites combined as they are adjacent to one another.
9877	Former Shires Bathroom, Normacot	18	-	1.57	Mixed	-
2131	Development land at Park Hall Business Village, Park Hall	18	Former City Plan Allocation	0.59	B1c	-
2428B	Minton Hollins Land, Shelton Old Road, Stoke	18	Former City Plan Allocation	2.23	Mixed, B1a	-
6097	Land at Cannon Street, Hanley	17	-	1.57	B1a	Site now combines 3238 and part of 9482.
2093	Land off Peacock View, Fenton	17	Former City Plan Allocation	13.76	Mixed	-
2066	Stoke Train Station Sidings South, Station Road, Stoke	17	Former City Plan Allocation	3.63	B1a	-
2419	Land adjacent to Newstead Industrial Estate	16	-	4.87	B2	-
7324C	Land north of Tunstall Bypass, Sandyford	16	Former City Plan Allocation	3.25	Mixed, B1a	-
2099A & 2099B	Former Berry Hill Potteries, Fenton	16	2099A is a former City Plan Allocation	15.19	Mixed	Sites combined together as they are located adjacent to one another.

9677	Former Hewitts Premises, Victoria Road, Fenton	16	-	1.98	Mixed Industrial	-
6276	Vacant land, Butler Street, Stoke	16	Former City Plan Allocation	0.46	Mixed, B1a	-
9196	Former Clarence Primary School, Sampson Street, Hanley	16	-	0.43	B1a	-
9756	Caradon Twyfords Excelsior Works and Garner Street, Cliffe Vale	15	-	5.72	Mixed Industrial	-
9397	Former Stanley Pottery, Newport Lane, Middleport	15	-	1.77	Mixed	-
9394	Former Portland Works, Sutherland Road, Longton	15	-	1.39	Mixed	-
2425A & 2425B	Former Fuchs/ Lear Management site, York Street, Hanley	15	-	5.33	B1a	Site has various retail & leisure consents.
2421	Etruria Valley, Forge Lane	15	-	20.26	Mixed, B1a	-
9435	Site off Cobridge Road, Hanley	14	-	1.33	B1c	Site boundary altered to only include the vacant site towards the north.
2423	Former Brownhills Tileries, Harewood Street, Tunstall	14	-	8.96	Mixed	-
2015B	Land off Chatterley Road, Sandyford	14	Former City Plan Allocation	3.11	Mixed	-
9283	Land off Scotia Road, Tunstall	14	-	1.88	B2	-

9631	Land at Etruscan Street, Etruria	14	-	1.45	Mixed	-
9477	Former railway goods, yard and buildings, Station Street, Longport	14	-	3	Mixed	-
9491	Former Royal Doulton Works & Visitors Centre, Burslem	14	-	1.47	Mixed, B1a	-
2119	Land at Whieldon Road, Stoke	14	Former City Plan Allocation	5.32	B2	-
9456	Boundary Works, King Street, Longton	14	-	1.06	B2	
1625	Land at Coronation Avenue, Longton	14	-	1.08	B1a, B1c	Residential in character
2182A & 2182B	Land at Mossfield Industrial Estate, Adderley Green	14	Both sites former City Plan Allocations	2.07	Mixed	Sites combined as they are adjacent to one another.
9534	Renew Site (PO9) off Potteries Way, Hanley	13	Renew site	1.44	B1a	Suggested that only land fronting Potteries Way is more deliverable for offices.
2046A, 2046B & 9479	Sites off Leek New Road, Cobridge	13	Both 2046A and 2046B were former City Plan Allocations	6.84	Mixed	Sites combined together as they are located adjacent to one another
9564	Site off Etruria Road, Hanley	13	-	1.39	B1c/retail	Some existing uses on site. Likely to be retail led.
3209B	Land West of Brownhills Road, Tunstall	13	-	5.32	Mixed	Suggest removing the long tail towards the north of the site.
9411	Land at Crowcrofts Road, Newstead	13	Green Belt land	8.82	B2	-
3209A	Land East of Brownhills Road, Tunstall	13	-	4.07	Mixed	-

9489	Shelton Enterprise Centre, Shelton	13	-		2.12	B1c	Some existing uses on site
9335	Etruria Works, Etruscan Street, Shelton	13	-		2.05	Mixed	Derelict buildings. Site currently being used by Soto Building Foundations
9482	Site off Cannon Street, Hanley	13	-		0.44	B1a	A number of existing uses already exist on the site.
9436	Site off Grove Road, Heron Cross	13	-		1.44	mixed	-
1821	Stoke Train Station Sidings North, Vernon Road, Stoke	13		Former City Plan Allocation	1.07	B1a	-
9481	Marsh Street, Hanley	12	-		0.85	Mixed, B1a	-
1815	Site off Cobridge Road, Hanley	12	-		2.23	B1a, B1c	Some existing uses on site
9603	Marsh Street, Hanley	12	-		0.99	Mixed	-
1022	Land between Huntville Road and Scotia Road, Tunstall	12		Former City Plan Allocation	9.25	Mixed	Heavily tipped and overgrown site
9767	IPS Ceramics, Shelton New Road, Stoke	12	-		4.6	Mixed Industrial	Site currently occupied
2074	Cockshott Sidings, Shelton New Road, Shelton	12		Former City Plan Allocation	2.92	Mixed	Operational storage yard
4243	Land off Lordship Lane, Fenton	12		Former City Plan Allocation	6.87	B1a	-
9490	Former Spode Works, Eleanor Street Stoke	12	-		4.06	Mixed, B1a	Stoke City Council own the site and proposals are being put together for a mixed use scheme.
9496	Stoke Business Park, Woodhouse Street, Stoke	12	-		0.46	mixed	Aging industrial estate of poor quality

9775	Carpet Right, Etruria Road, Hanley	12	-	0.95	B1a and B1c	-
3020	East/West Precinct, Old Hall Street, Hanley	12	Former City Plan Allocation	0.43	B1a	Site is subject to comprehensive retail proposals, which may include some office use. Stoke to confirm B1 land take-up.
2427 & 9554	Land South of Clough Street, Hanley	11	-	7.76	Mixed	Some existing uses on site
2424	Land North of Clough Street, Hanley	11	-	6.05	Mixed	Some existing uses on site
2108B	Land adjacent to Mossfield Industrial Estate, Adderley Green	11	Former City Plan Allocation	7.36	Mixed	-
1790	North Staffs Royal infirmary, Hartshill	10	-	8.84	B1a	Site will become available in the future when hospital functions move from the site. Part of site likely to be suitable for B1a use.
2380B	Former Sports Field, Copp Lane, Tunstall	10	-	6.27	Mixed	Issues relating to road accessibility of the site.
2057A & 2057B	Northern section of Etruria Valley	8	Former City Plan Allocation	19.34	Mixed	Sites considered as one as they are all located adjacent to each other. The main issue in relation to these sites is the accessibility to the A500.
Newcastle-under-Lyme						
N1719	Georgia Pacific site. Outskirts of Newcastle Town Centre	16	-	0.56	B1a (part)	Remainder of Georgia Pacific Site and Maxims

N1607	Buildings at Water Street/George Street. Outskirts of Newcastle Town Centre	16	-	0.24	B1a	-
N1489	Buildings at Lymedale Cross. Knutton	13	-	0.39	B1a	Only apparent development land is a small area between main access road and Fairey Industrial Ceramics
N1487	Pepper Street Garage, Keele	13	-	1.1	B2	Site currently being marketed by Louis Taylor and has planning consent for B2/B8 uses. Site boundary on map will have to be adjusted to show the whole development site.
R69	Keele Science Park Phase 2	22	-	0.5	B1b	-
R68	Keele Science Park Phase 3	22	Site Allocated in Local Plan 1996-2011	28.74	B1b	-
R128	Former Children's adventure playbarn (next to Sheet Anchor PH), A53, Baldwins Gate	12	-	0.31	Mixed	Suggested that the site boundary shown on the map is altered.
R127	Land Between Cemetery Road & Keele Road, Keele	13	Green Belt Land	19.93	B1b	-
R114	Existing Home Farm Buildings, University of Keele, Keele	22	-	0.91	B1b	Site in the process of being converted to offices. Keep site in as figures contribute towards meeting the target.
NEW SITE near Talke	Former warehouse and yard, Congleton Road. Talke	12	-	3.48	Mixed	Site contains a derelict building of 157,811 square foot on an unoccupied site.

N893	Lowlands plot, Chatterley Valley (Phase 1)	16	Site Allocated in Local Plan 1996-2011	6.52	B8	-
N1732A	Former Blackfriars Bakery, telephone exchange, furniture retailer and ATS unit. Outskirts of Newcastle Town Centre	15	-	1.56	B1a (part)	Potential mixed use site - ATS needs acquiring.
N1731	Land Between Talke Road and A500	11	Green Belt Land	22.84	B1a (part)	-
N1730	Former Zanzibar Ballroom. Outskirts of Newcastle Town Centre	15	-	0.35	B1a (part)	Site appropriate for mixed use town centre scheme
N1728	Chesterton Speedway Stadium. Chesterton	11	-	4.86	B8	-
N1726	Land at Brampton Road and Sandy Lane.	16	-	0.6	B1a	Site only suitable for office use only, restricted to HQ-style. Ha. change following recommendation from Newcastle officers.
N1725	St Giles site (Former Primary School). Newcastle Town Centre	14	-	0.33	B1a	-
N1724	Newcastle Bus Depot, off A34	16	-	0.82	B1a	-
N1723B	Nelsons Place, Jubille Baths building	13	-	0.63	B1a	Site adjusted to now combine N1414 and N1723C
N1722	Public open space off London Road. Chesterton	18	-	2.9	Mixed	Site currently used as public open space. So it is likely that there would be planning issues related to using the

						site for employment uses.
N1721	Land South of A500, west of A34	9	Green Belt Land	30.21	Mixed, B1a	Major planning and highway issues to overcome in order to develop site for employment use
N1720	Hampton Scrap Yard and land to the west. Keele	13	-	5.02	B1b	-
N1628C	Site adjacent to new Sainsburys, Liverpool Road.	17	-	0.52	B1a	Site restricted to B1a use. 24,000 sq. foot of offices required as part of Sainsbury's planning consent.
N1616	Land at Lymedale Cross. Knutton	16	-	0.9	B1a	-
N1608	Site off Watermills Road. Chesterton	14	Site Allocated in Local Plan 1996-2011	1.45	B2	-
N1479	Silverdale Business Park, Cemetery Road. Silverdale	16	-	1.31	B1c	-
N1477	Land Adjacent to Centre 500. Wolstanton	13	Site Allocated in Local Plan 1996-2011	1.5	B1c, B8	Remaining land, Centre 500
N1474	Ex Chesterton Gasworks. Off London Road	15	-	9.29	Mixed	-
N1471	Rowhurst Close, off Watermills Road	15	-	20.49	B2	Sites incorporates N1576, N1696 and N1523
N1468	Chatterley Valley Phase 2. Peacock Hay	9	Site Allocated in Local Plan 1996-2011	44.28	Mixed	A number of constraints exist to bringing the site forward including topography, access and infrastructure. A sizeable strategic site however.
K309	Land off West Avenue. Kidsgrove	14	-	2.06	B1c	-

K295	Site off West Avenue. Kidsgrove	16	-	5.02	B1c	Planning permission granted for mixed use. Employment element is for 1.83 ha.
K275	Kidsgrove Train Station Yard	13	Site Allocated in Local Plan 1996-2011	0.91	B1c	-
Total Number of ha to take forward to stage 2				561		

9.4 Appendix 3 - Full econometric analysis and economic forecasting report by Adroit Economics

November 10

Employment Land Review - economic assessment

Prepared by Adroit Economics

For and on behalf of

Stoke on Trent and Newcastle under Lyme

Author: Dr Stephen Sheppard, PhD Cantab
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1. Introduction

- 1.1 Adroit Economics Ltd was commissioned to assist the URS-Scott Wilson team undertake an economic land review for Stoke on Trent (Stoke) and Newcastle under Lyme (NuL). Our role was to undertake an economic analysis of the two economies, to formulate a method for forecasting employment change and to model the implications for future employment land requirements.
- 1.2 This paper sets out the approach and methodologies used and summarises the results of this work.
- 1.3 If you have any questions or require further information, please do not hesitate to contact the author
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The author....Dr Steve Sheppard, Managing Director, Adroit Economics Ltd

Dr Steve Sheppard has a PhD from the University of Cambridge, in economic development and regeneration

He has worked in the fields of regional and local economic policy and development for 20 years, in academia, in industry and in consultancy, undertaking a wide range of assignments for the UK Government, regional agencies, local authorities...and internationally for the EU, World Bank and some foreign governments

He set up Adroit 5 years ago as a small specialist consultancy providing senior experienced people capable of thinking creatively and innovatively

Prior to Adroit, he was a director of economics at DTZ

Over the last 10 years he has specialised in

- Local economic analysis and growth strategies
- Industry and business sector analysis and strategies
- Infrastructure and property development

He has a particular expertise in technology and economic transformation, with strong experience in policy for, business cases and funding and evaluation of

- Science parks, mediparks, technology parks, incubators, enterprise centres, innovation and enterprise policy
- Growth of technology sectors – medtech, bio, pharma, new materials, advanced engineering, digital, renewable energy, electric vehicles....and so on
- Policy, procurement and funding of infrastructure of the future – superfast broadband, electric renewable and vehicle charging infrastructure for example

2. Executive Summary

2.1 Adroit Economics Ltd was commissioned to assist the URS-Scott Wilson team undertake an economic land review for Stoke on Trent (Stoke) and Newcastle under Lyme (NuL). Our role was to undertake an economic analysis of the two economies, to formulate a method for forecasting employment change and to model the implications for future employment land requirements.

2.2 This paper sets out the approach and methodologies used and summarises the results of this work.

Methodology

2.3 To estimate future employment land needs for Stoke and NuL to 2025, we undertook two assessments

- First, we estimated future employment change for each industry and business sector (at 2-digit SIC level). These employment change projections were amalgamated into 6 broad land-use types and converted to floor space (using appropriate average floor space per worker metrics), then to land-take (using appropriate site density metrics). This provided estimates of the land required to support net employment growth.
- Second we estimated land needs to support modernisation - further land will be required to meet the needs of existing firms/ activities that will seek more modern premises on more appropriate sites in more appropriate locations, suitable to meet the needs of a modernising industrial economy. Modernisation land needs were estimated for each of the 6 broad land-use types

2.4 The results of the two assessments – land needed to support employment growth and land needed to support modernisation of existing activities – were added together to provide an overall estimate of total future employment land needs by 2025.

2.5 Outwith this paper, the team then matched existing supply against these future need estimates to determine the extent to which current supply could meet these needs.

2.6 In parallel, as a cross check and also to explain where the demand for additional land originates, we undertake a detailed assessment of (i) small firm growth and associated land needs and (ii) of inward investment trends and associated land needs.

Conclusions - future employment land requirements

2.7 We estimate that land (HA) required by 2025 will be in the vicinity of 370 HA. This figure breaks down as follows:

- to meet upgrade/ modernisation needs of existing occupied stock will be

= Stoke	124 ha
= NuL	45 ha
= Stoke + NuL	170 ha
- to accommodate net additional jobs will be

= Stoke	103 ha
= NuL	104 ha
= Stoke + NuL	207 ha
- Totalling.....

=	Stoke	227 ha
=	NuL	150 ha
=	<u>Stoke+NuL</u>	377 ha

2.8 Breaking down these figures into broad land use type suggests a very different set of land requirements for each of Stoke and NuL, as follows:

<u>For Stoke</u>	<u>For NuL</u>
<ul style="list-style-type: none"> ▪ Significant falling requirement for heavy industrial land ▪ Significantly increasing requirement for in logistics land ▪ Limited / static requirement for the other land use types 	<ul style="list-style-type: none"> ▪ Significant requirement for logistics, office and retail land ▪ Limited requirement for light industrial land ▪ Limited decline in requirement for heavy industrial land ▪ Static demand for medium industrial land

3. Approach and Methodology

Summary

- 3.1 To estimate future employment land needs for Stoke and NuL to 2025, we undertook two assessments
- First, we estimated future employment change for each industry and business sector (at 2-digit SIC level). These employment change projections were amalgamated into 6 broad land-use types and converted to floor space (using appropriate average floor space per worker metrics), then to land-take (using appropriate site density metrics). This provided estimates of the land required to support net employment growth.
 - Second we estimated land needs to support modernisation - further land will be required to meet the needs of existing firms/ activities that will seek more modern premises on more appropriate sites in more appropriate locations, suitable to meet the needs of a modernising industrial economy. Modernisation land needs were estimated for each of the 6 broad land-use types
- 3.2 The results of the two assessments – land needed to support employment growth and land needed to support modernisation of existing activities – were added together to provide an overall estimate of total future employment land needs by 2025.
- 3.3 Outwith this paper, the team then matched existing supply against these future need estimates to determine the extent to which current supply could meet these needs.

Methods used in more detail

1) Method used for estimating employment land needs based on net employment growth projections

- 3.4 We adopted a 3-stage methodology as follows
1. **Baseline context** - first we undertook a high level economic baseline assessment, mapping employment, employment change and relative strengths in the two economies, compared with (benchmarked against) a range of other comparable cities/ towns
 2. **Employment projections** - second, we undertook a more detailed analysis of the stoke and NuL economies, at 2-digit SIC level, examining past trends and estimating future potential employment, productivity (GVA per FTE) and GVA
 3. **Converting net employment growth to land requirements** - Third, we formulated a model to convert estimated employment change into future demand for employment floor space and sites.
- 3.5 The following table shows stages 2 and 3 in more detail

Model to convert employment forecasts to demand/need for floor space and land	
Step	Details
Stage 2.1	Download 2-digit SIC employment data for the latest period (in this case 1998-2008) and convert to FTE (assuming 2 PT = 1 FT)
Stage 2.2	Project forward to target year (2025) by applying annual % change to each year (either the change pa derived from the actual data, or where it's necessary to override this default, an assumed % change ¹)

¹ We applied an assumed employment growth rate (rather than one based past trends), to sectors where the percentage of employment change over the period appeared unreasonably high. This occurred in a number of cases

Stage 2.3	Allocate actual and projected FTE employment data from the c.60 2-digit SICs to 6 broad employment land use categories
Stage 3.1	Convert employment to floor space equivalent by applying an average sq ft per FTE for each land use type (allow for density change over time)
Stage 3.2	Convert floor space to land take, assuming an appropriate development density ratio
Step 3.3	This analysis provides estimated floor space and land take pa. Calculate change from current year to end of period (2010-25)

3.6 In parallel, as a cross check and also to explain where the demand for additional land originates, we undertake a detailed assessment of (i) small firm growth and associated land needs and (ii) of inward investment trends and associated land needs.

2) Outline of methods used to assess modernisation land needs

3.7 It is clear that a proportion of existing sites and premises occupied by existing activities are already or will become less than ideal, such that the firms/ activities will require better, more modern, more appropriate premises on more appropriate sites in better locations, if they are to remain competitive and indeed potentially expand.

3.8 In the absence of an occupier survey, we have estimated the proportion of existing stock that will need to modernise over the period to 2025 as follows

- We start with current employment (FTE) relating to each of the 6 broad land use types
- Based on the team's knowledge of existing land supply and on consultations with developers, investors and wider stakeholders, we have made a broad judgment of the percentage of the stock that will require modernisation
- The percentage figure was applied to existing employment (2010 est.) and translated into floor space then into land requirements using the same conversation metrics as in the employment growth model

Further details of the methodology

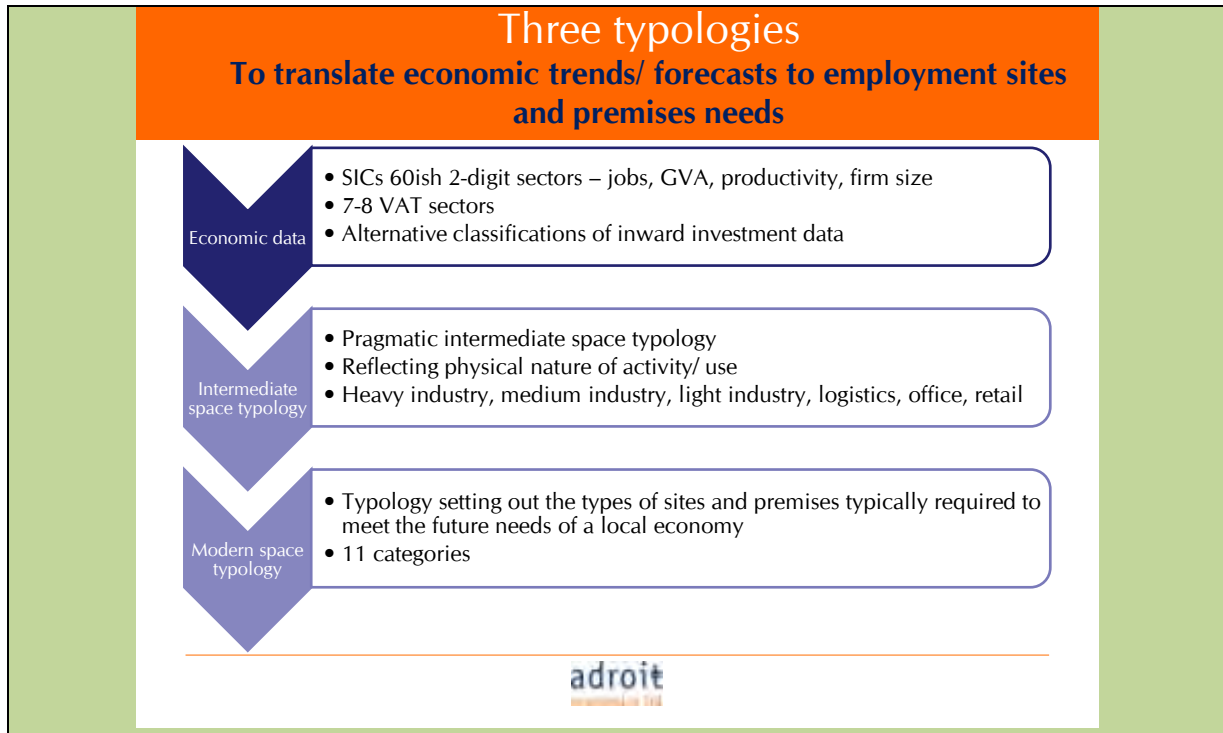
3.9 It's worth drawing attention to several features of the methodology

- The various typologies used to capture the economic data and convert it to floor space and land needs
- Key assumptions in the spreadsheet model used to bring all the calculations together
- Bottom-up reality check

Typologies used to convert SIC-based employment growth to requirements for specific types of sites and premises

3.10 Three typologies lie at the centre of the process, the first seeks to capture the economic data, the second (an intermediate typology) seeks to convert this into 6 broad types of floor space and land and the third translates this into the specific types of sites and premises that are likely to be required by a modernising industrial economy.

either because the base number was very low such that a single small inward investment trebled or quadrupled existing employment or because the base number was zero because it had been screened due to confidentiality reasons). In such cases it was inappropriate to project future employment based on past change as this would result in exponential employment growth that was unreasonable. Instead, we assumed a lower, more reasonable growth rate based on the team's knowledge of the local economy, knowledge of the area and on consultations with developers, investors and other stakeholders.



Economic data – source data typologies

- 3.11 In the analysis, we drew on 4 sources of economic data, presented using 3 different typologies
- Data from the Annual Business Inquiry dataset (ABI) which provides employment (FT and PT) and firm size, **by SIC**
 - Data from ONS which provides GVA **by SIC** at national and regional level
 - VAT data showing registrations, deregistration and net change at **broad industry/ business level**
 - **Bespoke** inward investment data provided by the inward investment agency (In-Staffs)
- 3.12 The SIC classification system breaks the economy down from a handful of very broad groupings to hundreds of sub sectors. The latest SIC coding is 2003. We have used the 2-digit level classification that provides c. 60 or so sectors
- 3.13 VAT data is presented at a much higher level – with a sectoral breakdown limited to 7 or 8 broad sectors
- 3.14 The inward investment data, provided by In-Staffs, included number of projects, estimated employment and floor space. Additional fields allow the data to be grouped in different ways, the most useful of which were – by date, by sector, by geography

Intermediate typology

- 3.15 We then needed a suitable, simple, pragmatic typology that can marshal the economic analysis in a suitable way, before we then translate the analysis in to very specific sites and premises needs.
- 3.16 We used the following simple land-use typology

Heavy industrial	HI
Logistics	L
Light industrial	LI

Medium industrial	MI
Office	O
Retail	R ²

Typology reflecting the specific types of floor space and sites required to meet the needs of a modern transforming economy

- 3.17 We then need to translate the intermediate analysis into need/ demand for the specific types of sites and premises which an evolving modernising local economy will need
- 3.18 We've formulated such a typology based on the team's wider experience of modernising industrial economies.
- 3.19 The following table sets out the typology and the subsequent table cross references this against the main types of economic activity in an economy

R	Home
B1	Town centre/ suburban secondary property market
B1	Bespoke office building in town centre/ suburbia
B1	Stand alone enterprise centre/ incubator
B1	Business Park/ Science park - incubator
B1	Business Park/ Science park - grow on and larger space
B1	Stand alone managed workshops
B1/2/8	Trading estate - mixed use light industrial/warehouse park
B1/2/8	Standalone manufacturing site
B8	Dedicated logistics park
B2	Heavy industrial park/ area

	Office activities	Light manufacturing activities	Heavy industrial activities	Storage and distribution activities
Home	micros	micros (v light activity in garage or shed)	X	X
Town centre/ suburban secondary property market	micros and mediums	micros (v light)	X	X
Bespoke office building in town centre/ suburbia	micros, mediums and large	X	X	X
Stand alone enterprise centre/ incubator	micros	R&D/ prototyping micros	X	X
Business Park/ Science park - incubator	micros	R&D/ prototyping micros	X	X
Business Park/ Science park - grow on and larger space	mediums and large	R&D/ prototyping mediums	X	X
Stand alone managed workshops	X	micros	X	X
Trading estate - mixed use light industrial/warehouse park	mediums	all sizes	X	micro/medium

² We included retail as a category for completeness and because some of the activities under the retail heading may have employment land needs (i.e. they may relate to warehousing/ logistics and to some office activities)

Standalone manufacturing site	ancillary	large/ very large	large/ very large	ancillary
Dedicated logistics park	ancillary	ancillary	X	medium/large/v large
Heavy industrial park/ area	ancillary	ancillary	all sizes	ancillary

Key assumptions in the spreadsheet model used to bring all the calculations together

3.20 The analysis includes a number of **key assumptions**....the team have reviewed the assumptions in the light of the field work and their wider experience, and are happy with the balance of assumptions made

3.21 Key assumptions are

- To project future employment per land use type
 - = Estimated annual % change per 2-digit SIC 1998-2025
 - = Allocation of 2-digit SICs to 6 broad land use types
- To convert employment to floor space
 - = Average floor space per FTE average for the 6 land use types
 - = Annual % change in floor space per FTE 2010-25
- To convert floor space to land
 - = Average development density for each of the 6 land use types
- To estimate upgrade/ modernisation needs
 - = Estimated % of current occupied stock that will need to upgrade/ modernise via relocating to new (better) sites and premises

Bottom-up reality check

3.22 The data analysis can be subject to error, the key sources of which can be:

- The way some of the employment data is categorised makes it difficult to cross match it with one of the 6 main land use types
- Some of the employment data may be missing (screened due to confidentiality)

3.23 It is therefore important to cross-check the emerging results from a bottom-up perspective, from the team's knowledge of what has actually happened on the ground. This provides a reality check. It also helps us refine the assumptions and categorisations. This is an iterative process ensuring that the detailed modelling is generating results that are sensible given what we know has happened on the ground and what the development industry thinks is likely to happen.

4. Benchmarking the Stoke and NuL economies

4.1 This section sets out the results of benchmarking the Stoke and NuL economies, in terms of employment, against comparator towns/ cities:

- Crewe
- Derby
- Stafford
- Wolverhampton

4.2with all bench marked against the wider England economy (minus the greater Southeast as these figures distort the comparison)

4.3 In the analysis we consider

- Size of employment by broad industrial sector
- Share of total employment for each sector
- Change in employment over the period for which data is available (1998-2008)
- Relative concentration of employment, in each area, against the England average

Share of total employment by Sector

4.4 The following table shows where employment is concentrated in each of the areas:

- Wholesale/Retail is relatively large in Newcastle, with transport and storage close behind
- Manufacturing followed by wholesale and retail are the largest in Stoke

Distribution of Employment by Sector (2008)							
	Newcastle-under-Lyme	Stoke-on-Trent	Crewe	Derby	Stafford	Wolverhampton	Eng (Minus greater SE)
Agriculture, hunting and forestry	0.7%	0.0%	1.2%	0.1%	2.3%	0.0%	1.0%
Mining and quarrying	0.0%	0.1%	0.3%	0.2%	0.0%	0.0%	0.2%
Manufacturing	10.4%	18.5%	17.3%	21.4%	12.4%	16.0%	14.4%
Electricity, gas and water supply	0.1%	0.5%	0.3%	0.6%	0.7%	0.1%	0.5%
Construction	5.0%	5.9%	4.6%	4.6%	3.4%	5.2%	5.7%
Wholesale and retail trade;	23.9%	16.3%	18.7%	14.1%	14.3%	17.2%	16.3%
Hotels and restaurants	5.2%	3.9%	5.3%	3.9%	5.4%	4.3%	5.6%
Transport, storage and communication	15.6%	8.5%	6.6%	4.6%	5.9%	5.7%	6.0%
Financial intermediation	1.7%	1.8%	3.0%	2.6%	1.1%	3.3%	3.4%
Real estate, renting and business activities	11.4%	10.9%	17.4%	17.5%	12.6%	15.5%	16.1%
Public administration and defence; compulsory social security	2.2%	3.7%	4.3%	4.1%	12.1%	6.5%	5.9%
Education	12.8%	8.0%	7.4%	7.9%	8.3%	10.4%	8.7%

Health and social work	7.8%	16.9%	9.6%	14.8%	17.8%	11.8%	11.8%
Other community, social and personal service activities	3.3%	4.9%	4.0%	3.7%	3.6%	3.8%	4.3%
Total	100%	100%	100%	100%	100%	100%	100%

Source: ABI 2008.

NB: All areas defined as district authorities apart from Crewe which is defined as a postcode area town.

Relative concentrations of employment (as at 1998)

- 4.5 Relative concentrations of employment in each area are indicated by the following metric.....**Employment Log Location Quotient** (Versus England minus Greater South East)....this essentially compares the % share of employment for a given sector in the area against the % share of the sector in the wide England economy (although we take out the greater southeast region as this distorts the comparison)
- 4.6 It's interesting to see that even manufacturing is less represented in Stoke and Newcastle than the England average – this is in contrast to the other comparator areas and particularly Derby where it remains stronger thanks to companies like Roll Royce and rail manufacturing activities.

Log Location Quotient (Comparing with England minus Greater South East)						
	Newcastle-under-Lyme	Stoke-on-Trent	Crewe	Derby	Stafford	Wolverhampton
Agriculture, hunting and forestry	(0.36)	(0.36)	(3.18)	(3.18)	0.15	0.15
Mining and quarrying	(3.44)	(3.44)	(0.25)	(0.25)	0.52	0.52
Manufacturing	(0.32)	(0.32)	0.25	0.25	0.18	0.18
Electricity, gas and water supply	(1.98)	(1.98)	(0.13)	(0.13)	(0.48)	(0.48)
Construction	(0.14)	(0.14)	0.03	0.03	(0.23)	(0.23)
Wholesale and retail trade;	0.38	0.38	(0.00)	(0.00)	0.14	0.14
Hotels and restaurants	(0.07)	(0.07)	(0.35)	(0.35)	(0.05)	(0.05)
Transport, storage and communication	0.95	0.95	0.34	0.34	0.09	0.09
Financial intermediation	(0.70)	(0.70)	(0.66)	(0.66)	(0.14)	(0.14)
Real estate, renting and business activities	(0.35)	(0.35)	(0.39)	(0.39)	0.08	0.08
Public administration and defence; compulsory social security	(0.98)	(0.98)	(0.47)	(0.47)	(0.31)	(0.31)
Education	0.38	0.38	(0.08)	(0.08)	(0.16)	(0.16)
Health and social work	(0.41)	(0.41)	0.36	0.36	(0.21)	(0.21)
Other community, social and personal service activities	(0.28)	(0.28)	0.13	0.13	(0.07)	(0.07)
Total	(0.36)	(0.36)	(3.18)	(3.18)	0.15	0.15

Source: ABI 2008.

NB: All areas defined as district authorities apart from Crewe which is defined as a postcode area town.

Log LQ>0 = Sector overrepresented compared to comparator location, Log LQ,0 = Sector underrepresented compared to comparator location,

Comparing employment change by sector (1998-2008)

- 4.7 Manufacturing and Financial Intermediation have seen significant falls in employment over the period in Stoke and NuL. All other areas have also experience a fall but not as steep....with Derby experiencing the least fall, and lower than the England average (of -34%)
- 4.8 In contrast, Stoke and NuL have seen significant increases in transport, storage and communication actions (essentially warehousing/ logistics)

Employment Change by Sector (1998-2008)							
	Newcastle-under-Lyme	Stoke-on-Trent	Crewe	Derby	Stafford	Wolverhampton	Eng greater SE (Minus)
Agriculture, hunting and forestry	-30.9%	-37.3%	915.4%	-39.6%	1.4%	-13.3%	-6.0%
Mining and quarrying	-99.5%	-39.0%	-47.5%	-	150.0%	-97.9%	-38.8%
Manufacturing	-56.6%	-57.4%	-26.6%	-18.6%	-54.0%	-45.5%	-33.7%
Electricity, gas and water supply	1300.0% ³	-43.7%	35.8%	44.5%	-	-82.8%	-11.9%
Construction	-4.3%	-4.1%	-25.5%	-7.2%	-22.5%	-33.7%	18.6%
Wholesale and retail trade;	-12.9%	-11.3%	27.9%	-0.8%	9.1%	-2.3%	3.9%
Hotels and restaurants	9.5%	5.9%	30.7%	-0.1%	16.1%	8.8%	16.6%
Transport, storage and communication	287.9%	54.2%	28.7%	25.3%	12.0%	18.6%	15.6%
Financial intermediation	-33.7%	-28.8%	128.9%	45.9%	-30.1%	-19.4%	3.8%
Real estate, renting and business activities	55.4%	14.1%	45.2%	19.9%	3.0%	91.7%	47.8%
Public administration and defence; compulsory social security	-3.9%	10.6%	51.6%	31.1%	-17.8%	37.8%	16.3%
Education	21.4%	-19.6%	52.0%	2.2%	17.8%	20.8%	25.8%
Health and social work	26.3%	35.6%	123.7%	24.4%	26.3%	121.4%	33.4%
Other community, social and personal service activities	-4.8%	14.0%	25.1%	4.2%	-1.2%	22.3%	19.7%
Total	0.2%	-17.0%	20.6%	3.9%	-9.1%	0.9%	7.7%

Source: ABI 2008.

NB: All areas defined as district authorities apart from Crewe which is defined as a postcode area town.

³ This is an anomaly due to the statistics...a very small number of jobs at the beginning of the period

Comparing the three factors together

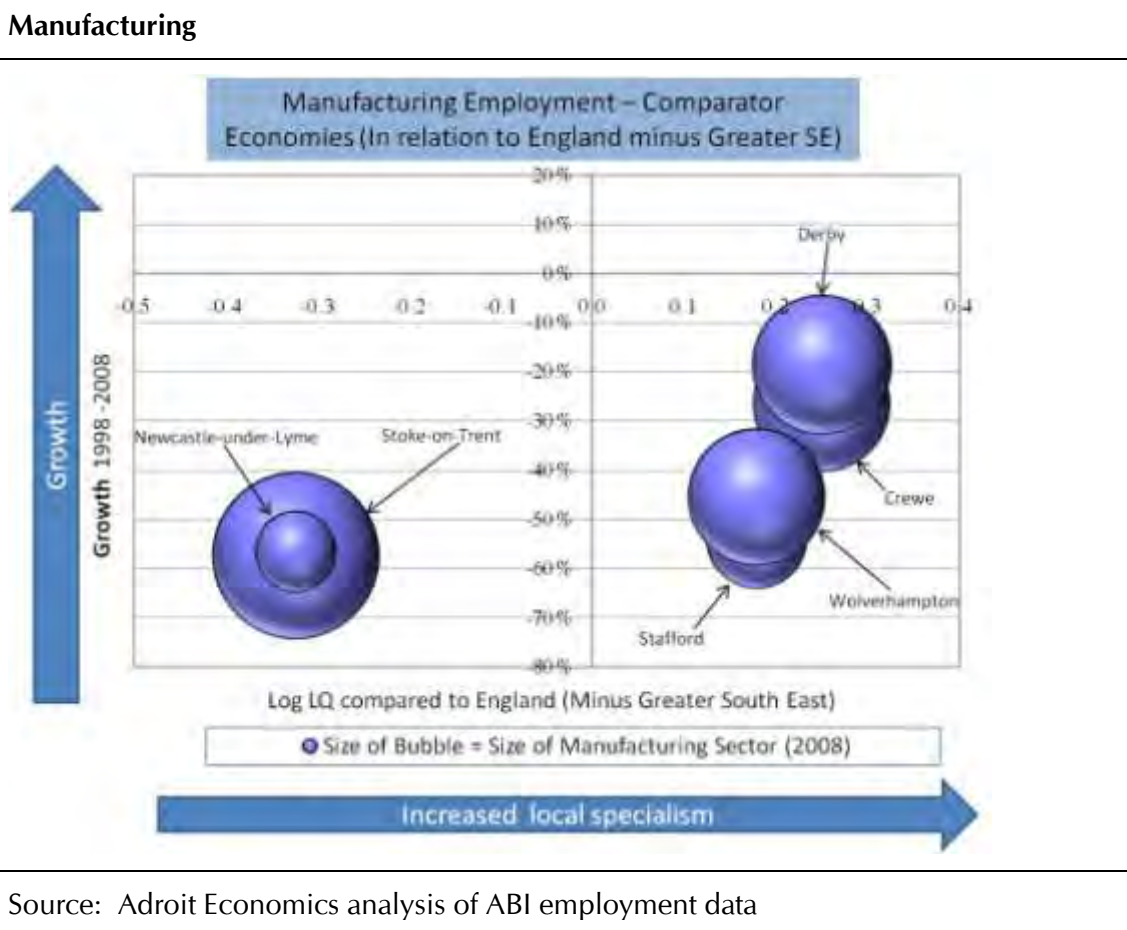
4.9 The following diagrammes, show for each main sector

- Size of employment – indicated by the size of the bubble
- Extent of growth or decline (1998-2008) – indicated by the vertical position on the chart...any bubble above the centre line has grown, any bubble below has declined
- Relative concentration (against the wider England economy minus the greater Southeast) – indicated by the horizontal axis.....any bubble to the right of the centre line has a greater concentration than the England average, any to the left a weaker concentration

Key findings

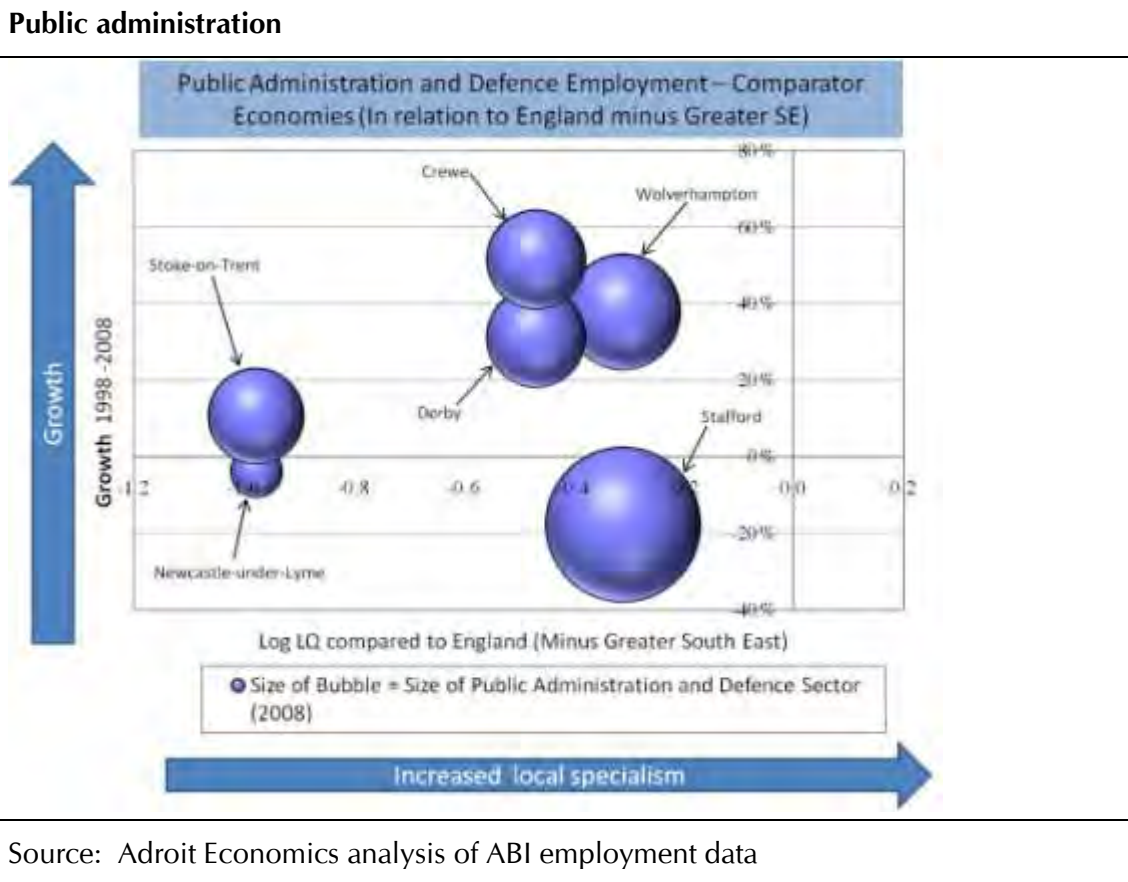
Manufacturing

- All areas have seen a decline in manufacturing employment, and at a greater rate than the England average
- Stoke and NuL have weaker concentrations in manufacturing employment than the England average....whereas all the other areas have a stronger concentration



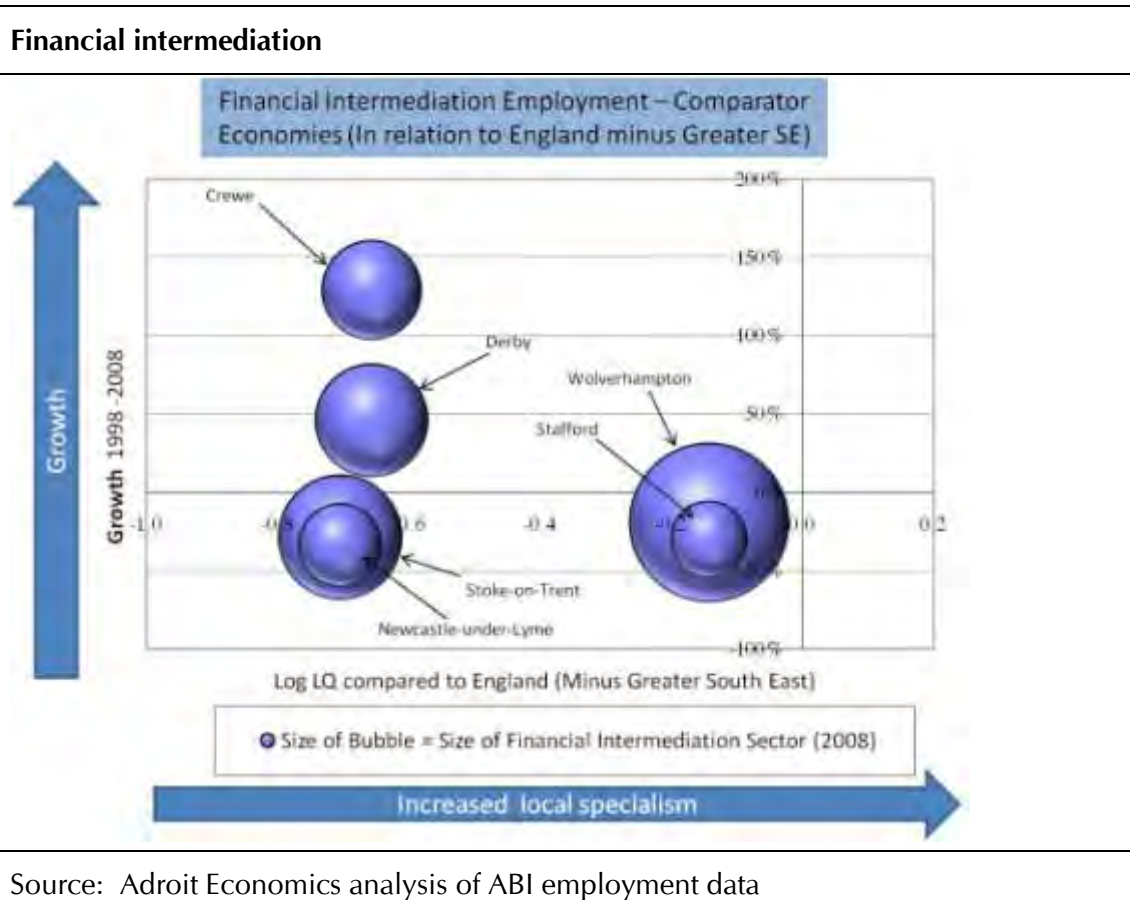
Public administration

- All areas, apart from NuL and Stafford have seen increased in employment 1998-2008
- But all areas have a weaker concentration (reliance) on public sector employment than the England average...with Stoke and NuL having the weakest concentration (reliance) of all areas



Financial intermediation

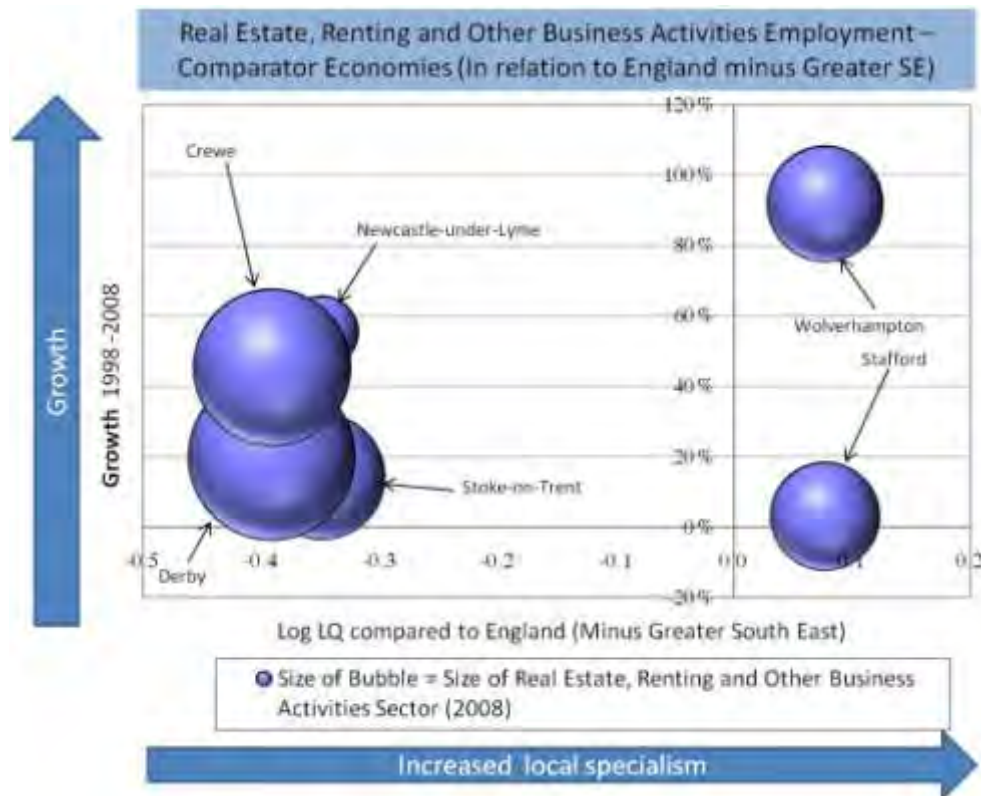
- Stoke and NuL, along with Stafford and Wolverhampton have seen a decline in employment 1998-2008...whereas Derby and Crew have seen significant growth
- All areas have weaker concentrations in employment than the England average...Wolverhampton and Stafford being the least weaker...the other areas demonstrating significant weakness (under concentration) compared with the England average



Real estate, renting and other business activities

- All areas except Stafford have seen growth in employment, with NuL and Crew experiencing the most growth and Stoke the least
- Only Wolverhampton and Stafford have strong concentrations of employment and the England average, with the other areas having significantly weaker concentrations

Real estate, renting and other business activities



Source: Adroit Economics analysis of ABI employment data

5. National economic context

- 5.1 What is happening in and what is likely to happen in the national economy will have a significant bearing on future prospects for both the Stoke and NuL economies.
- 5.2 At the risk of over simplification, national economies can be seen as subject to two major influences
- Short term trends – the cycle nature of capitalist economies (boom and bust)...growth and correction
 - Longer term underlying trends reflecting the changing location and balance of economic power
- 5.3 National economic forecasters, such as Cambridge Econometrics, Oxford Economics and Experian, reflect a combination of longer term underlying trends and shorter term cyclical change in their forecasts.
- 5.4 We explain the difference between these two trends below and provide some illustrations of recent national economic forecasts...one from Oxford Economics and one from the University of Warwick and Cambridge Econometrics.
- 5.5 To prepare our estimates of future floor space and land demand/ need in Stoke and NuL, we've focussed on applying the longer term trends, rather than the shorter term cycle trends, for two reasons:
- First it's difficult to predict shorter term cyclical trends as these are heavily influence by national/ international policy, which can change, radically and unpredictable, due to the outcome of elections and other political change
 - Second, supply of sites and premises is by definition, a long term process, that needs to respond to longer term change rather than to the shorter term ups and downs of the economic cycle.

Explaining short term and long term trends

Short term cyclical trends

- 5.6 The UK economy along with the rest of the G8/20 economies has experience a particularly long period of growth followed now, by a period of substantial correction
- 5.7 Through aggressive implementation of the right combination of policy by the G8/20 (a reflationary Keynesian approach), we have avoided a very rapid correction. This approach was learnt from mistakes made in the 1930s but had not be attempted in earnest. Hence, no one could be certain it would work. It apparently has...in that it turned a dramatic correction into a gentle but long slide down, with a few bumps on the way

Boom and bust, boom and bust

- It looks like Marx was right (Karl and Harpo)
- Karl - default position – boom and bust – only question is timing
- Harpo – climb all the way up to the top and fall straight down the other side, then start climbing up again
- The issue is whether we fall off a cliff or gently slide on our collective backsides down the hill

National policy has a significant influence

- Get it right (as Brown and the G8/20 did) - and we will have a soft landing...this inevitably takes time to reach the bottom – ***we are probably half way down at the moment***
- Get it wrong (as the Fed did in the 30s, as Thatcher/Lawson did in the late 80s) and we will fall off a

cliff. This is over with quickly but it then takes time to dust ourselves off before we begin the climb back up

- 5.8 But....we are now seeing aggressive implementation of an alternative policy.....cuts, cuts and more cuts
- 5.9 The theory is that reducing the cost of the state and red tape will unleash a new wave of entrepreneurial growth
- 5.10 The counter theory is that the cuts will undo the initial Keynesian approach and turn our gentle slide down the hill into a cliff half way down
- 5.11 But...how fast will the cuts actually occur and will they be countered by infrastructure and other spend?
- 5.12 The strong influence of policy on short term trends makes the life of the economic forecaster tricky, indeed....but let's also consider underlying long term trends

Underlying longer term trends

Clear established underlying long term trends

- Relatively easier to spot and project - policy has less and more indirect influence, but right policy can put in place long term building blocks – especially skills and infrastructure

Not good news though

- Rational for the UK's dominant economic role has been evaporating since the end of the first world war
- Few natural resources, reliant on importing energy, food and materials
- Manufacturing - UK lost low value manufacturing, first to E Europe, then to China India
- Remaining high value manufacturing a competitive, with GVA increasing....but often associated with falling employment (jobless growth)
- Now starting to lose higher value activities to France/ Germany
- Services – strong growth of high value activities, but increasing off-shoring of back office

The UK needs to reinvent itself economically – the main likely opportunities are

- Export of financial and businesses services is likely to be at the centre of the game
- Digital/ creative offers universal opportunity
- Continued investment in a smaller but competitive high value manufacturing sector
- Linked to commercialisation of science base

Illustrations of recent national economic forecasts

- 5.13 Following are charts and tables taken from two recent national forecasts⁴

⁴ We have had to refer to these forecasts because none were available regionally and the work undertaken by Experience for North Staffordshire does not include full forecasts. The report made available to us focussed on an employment forecast but did not include productivity or GVA. The latter two indicators are important when considering the prospects of former industrial economies given that key trends in manufacturing at the UK and local level are those of increasing productivity (measured in terms of GVA per FTE) and increasing GVA, set against falling employment. Looking at employment only provides part of the picture.

- The first set are from Oxford Economics recent forecasts prepared for Greater Manchester and available on the AGMA website – these were published in September 2010
- The second set are from the University of Warwick’s and Cambridge Econometrics’ recent forecast – these were formulated just prior to the recession but have been adjusted to take the recession into account

National economic prospects – jobs and GVA

5.14 The following OE charts suggest

- A significant but short term dip in employment and GVA, up to 2015
- Followed by a return to trend growth

Implications for economic forecasters

- Focus on long term trends
- Add bumps in to reflect short term cycles
- Take a position on the impact of short term policy

...taken from OE’s recent economic forecasts for GM

Employment outlook

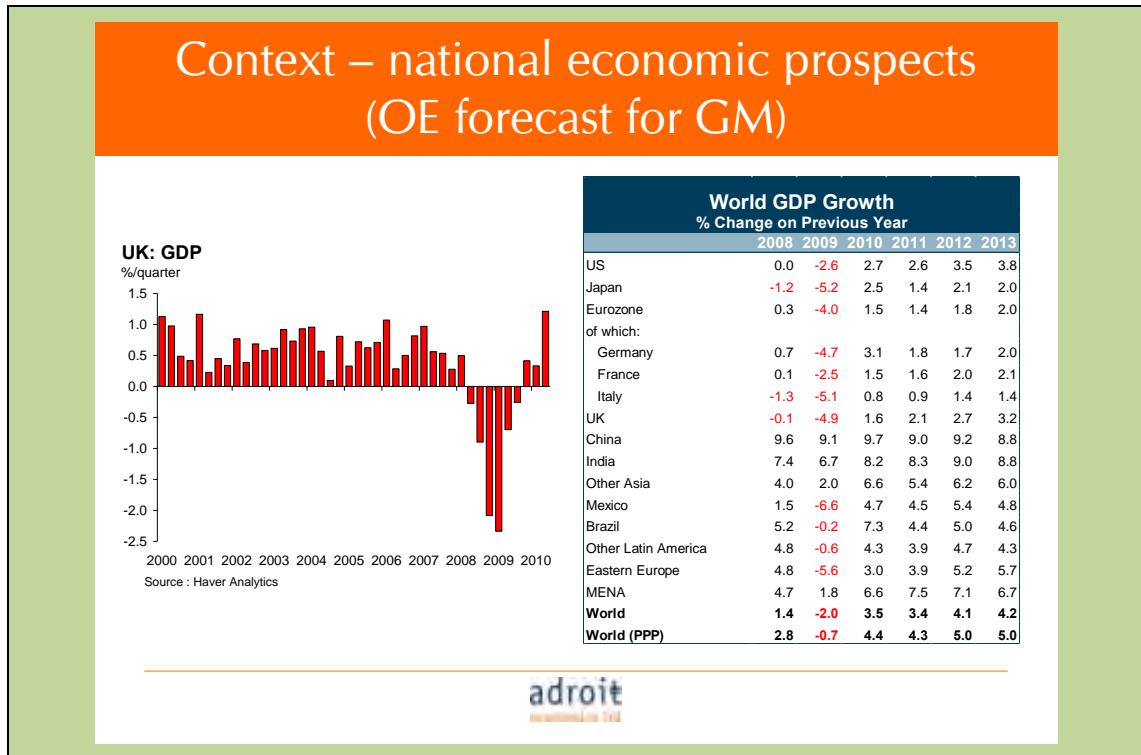
Source : GMFM

Productivity outlook

Source : GMFM

5.15 The following OE charts suggest that UK GDP has been hit particularly badly in 2008 falling by nearly 5%, with only Italy (-5.1%), Japan (-5.2%) and Mexico (-6.6%) showing a bigger fall.

5.16 UK GDP growth is anticipated to return 2009 onwards but at a slower rate than most other countries. The November report of the Office of Budget Responsibility (set up by the Government to, amongst other things, provide independent forecasts for the UK economy), confirms this expectation



Prospects for individual industry and business sectors

5.17 The following OE chart suggests that:

- Manufacturing employment, which fell by 1.4m 98-08, lost 350 thousand jobs during the recession (08-10), is expected to continue to fall over the next 10 years in the UK, but at a third of the rate as in 98-08. ***This is of particular relevance to the Stoke and NuL economies***
- Transport and communications, which generated 230 thousand jobs over 98-08, lost 135 thousand during the recession (08-10), is expected to generate 187 thousand jobs by 2020. ***This is of particular relevance to the Stoke and NuL economies***
- Financial services employment which generated 54,000 jobs 98-08, lost one and a half times the number of jobs during the credit crunch (08-10), is expected to generate a similar number of jobs as over 98-08
- Business services, which generated the most jobs over 98-08 (1.6m), lost only 112 thousand jobs during the recession and is expected to generate the most jobs of all sectors by 2020 (1.8m). ***This is of particular relevance to the Stoke and NuL economies***
- Public administration and defence, having grown by 180 thousand jobs over 98-08, is expected to lose 195 thousand jobs by 2020 (the November report of the office of Budgetary Responsibility reduces its own job loss forecasts from 450 to 350 thousand)

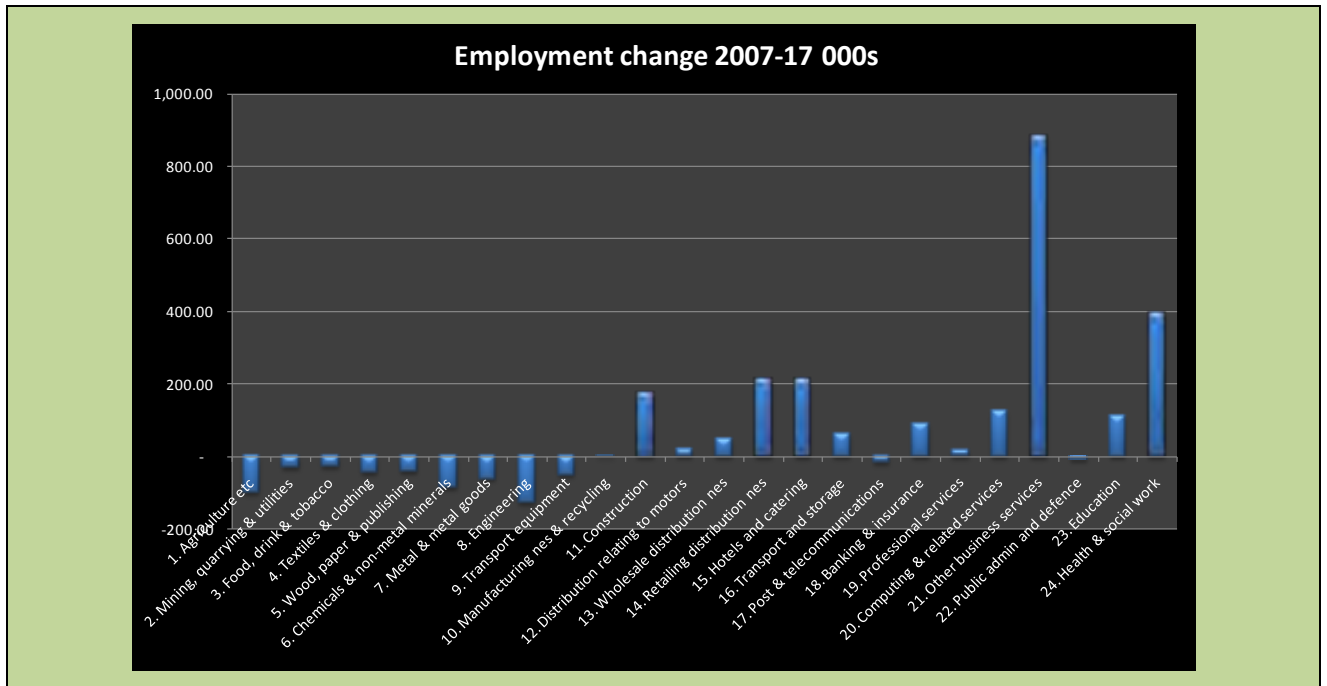
Context – national economic prospects (OE forecast for GM)

Sectoral employment change

	1998 - 2008	2008 - 2010	2010 - 2020
	(000s)	(000s)	(000s)
Agriculture	-67	79	-98
Extraction	-3	-8	-17
Manufacturing	-1417	-348	-514
Utilities	-24	6	-14
Construction	398	-202	188
Distribution & retail	185	-374	417
Hotels & catering	253	-83	222
Transport & comms	229	-135	187
Financial services	54	-78	55
Business services	1630	-112	1778
Public admin & defence	179	-11	-195
Education	549	56	-112
Health	791	232	74
Other personal services	363	-56	335
Total	3030	-1030	2298

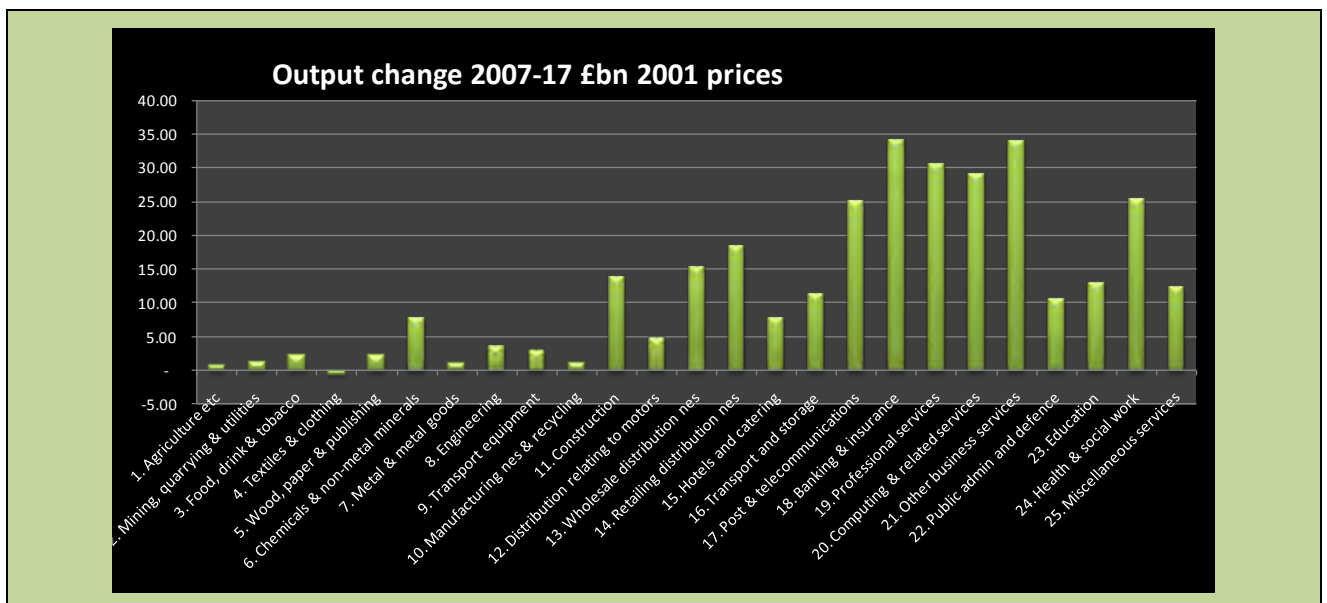
adroit
economics ltd

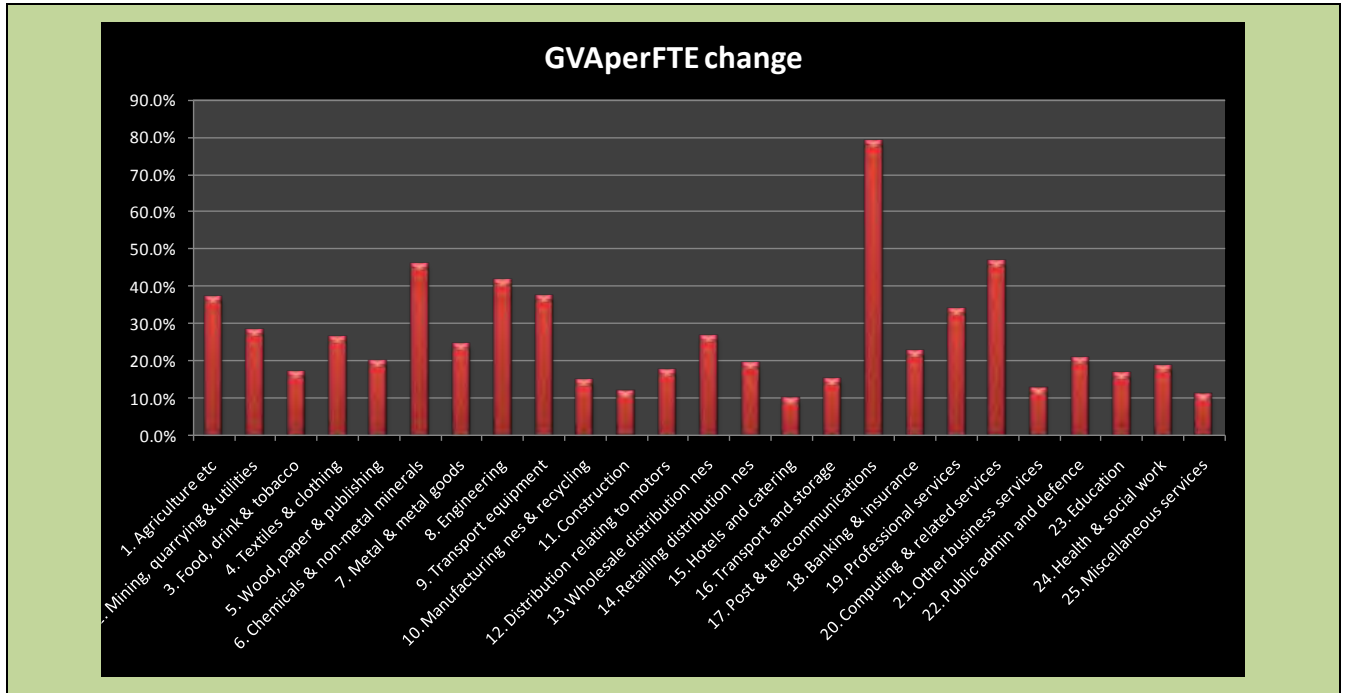
- 5.18 The following Warwick University/CE charts suggest a broadly similar picture (allowing for the different sector typology used)
- With other business services showing the most potential employment growth over the period 2007-17
 - Followed by retail and distribution, hotels and catering and construction
 - Followed by computing and related services, then banking and insurance.
- 5.19 Again, these are very relevant to the future of the Stoke and NuL economies.



5.20 WU/CE also forecast productivity and output change by sector to 2017, as shown below, with the results reinforcing a well known long term trend for the UK economy of:

- Limited output growth for manufacturing, resulting from increasing productivity offset but contracting employment
- Strong output growth across the service sector and particularly in financial and business services





6. Stoke and NuL employment projections

6.1 The benchmarking analysis, set out in section 3, considers past trends – based on the available time series employment data (1998-2008) – at a broad level (at 1-digit level of the standard industrial classification (SIC) system).

6.2 This section takes the analysis further, and estimates future employment change by 2025 at a finer grain level - at the 2-digit SIC level (covering some 60 or so individual industry and business sectors)

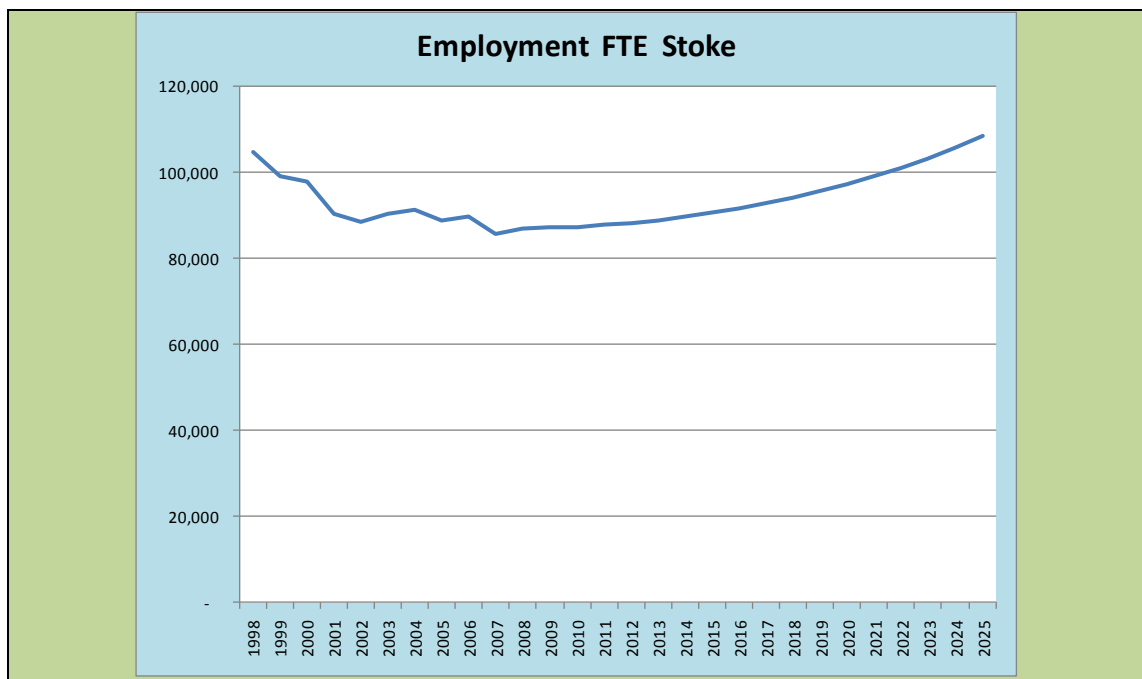
Results

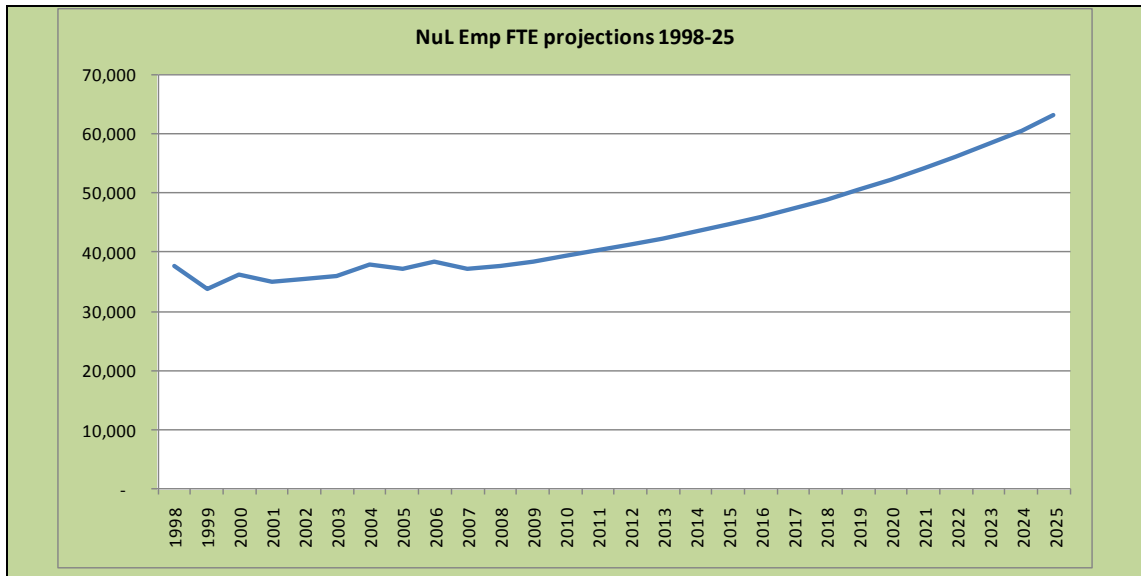
Total employment

6.3 The following charts suggests that:

- Overall employment in Stoke, which has been falling (98-2008) is likely to gently increase, compensating for jobs lost, by 2025
- In contrast, in NuL, overall employment has been steadily increasing since 1998 and is expected to increased at a faster from 2010 onwards

6.4 Please note that the analysis is based on projecting long term trends forward and does not take account of actual job loss that occurred during the recession (08-10). The data does not capture this and without a survey of firms we cannot identify actual job loss over this period

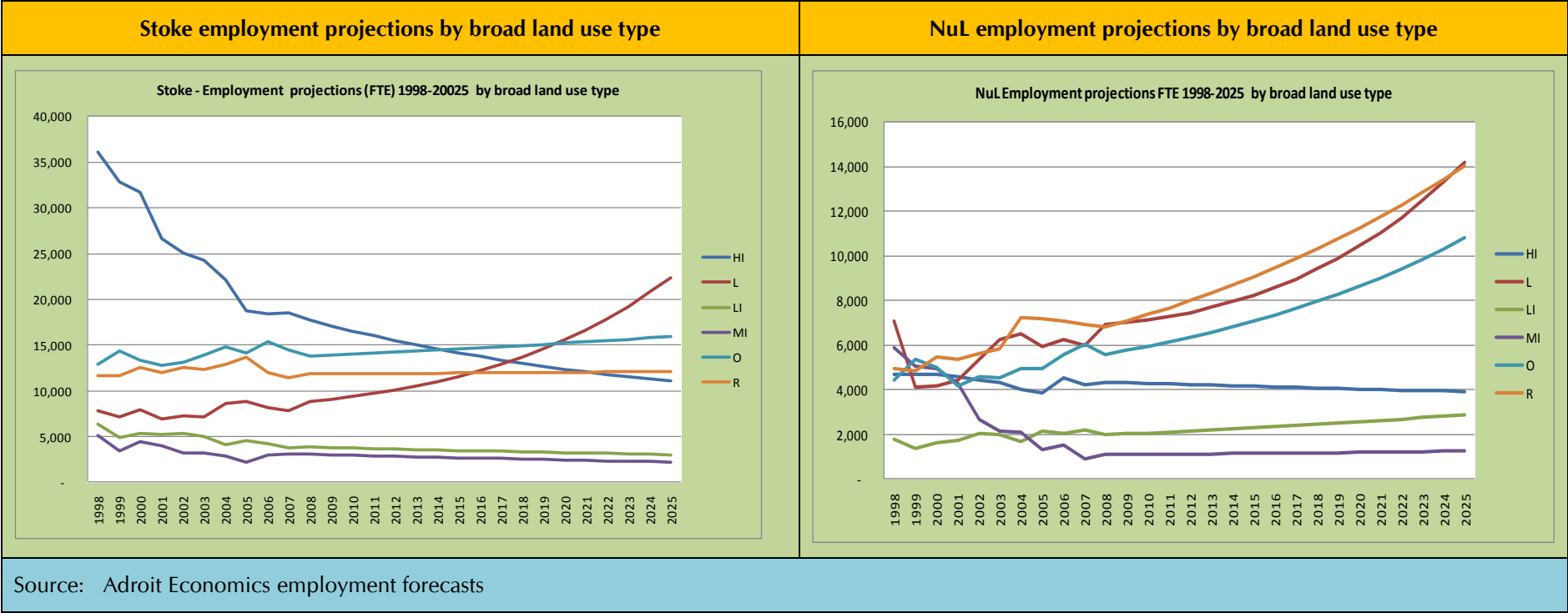




Sectoral breakdown of employment projections for Stoke and NuL

- 6.5 The following charts show past and future anticipated employment change (FTE) by broad land use type
- 6.6 The charts suggest the two very different land use type employment scenarios for Stoke and NuL, as follows:

<u>For Stoke</u>	<u>For NuL</u>
<ul style="list-style-type: none"> ▪ Significant but decelerating loss of heavy industrial jobs ▪ Significant growth in logistics jobs ▪ Limited growth in office based jobs ▪ Static retail employment ▪ Marginally falling employment in light industrial and medium industrial jobs 	<ul style="list-style-type: none"> ▪ Significant employment growth in logistics, retail and office based activities ▪ Some growth in light industrial jobs ▪ Static position in medium industrial jobs ▪ Continued limited decline in heavy industrial jobs



Cross checking our employment projections with those provided by *Experian* for North Staffordshire

- 6.7 Our projections are higher than Experian's, by 24,000. This is principally because the team, based on local consultation, believe that the opportunity for logistics growth remains significant, and that employment densities in logistics activities are likely to increase, substantially, through the increasing inclusion of back office, sales and other functions alongside those directly associated with storage and distribution.
- 6.8 If we remove this assumption from our projections, our figures are almost identical to those proposed by Experian.

Cross checking our employment forecasts against those provided for N Staffordshire by Experian				
<i>Adroit Economics Employment Projections</i>			<i>Experience Projections</i> <i>(taken from visual interpretation of a line graph)</i>	
Stoke	NuL	Total	Experian (mid scenario)	Experian high scenario
108,000	63,000	171,000 ⁵	14,500	147,000

⁵ Assumes continued and substantial logistics growth

7. Converting employment projections to broad land requirements

- 7.1 In this section, we translate the employment projections set out in the previous section into estimated demand/ need for 5 broad types of sites and premises⁶
- 7.2 We used the following simple land-use typology:

Heavy industrial	HI
Logistics	L
Light industrial	LI
Medium industrial	MI
Office	O
Retail	R

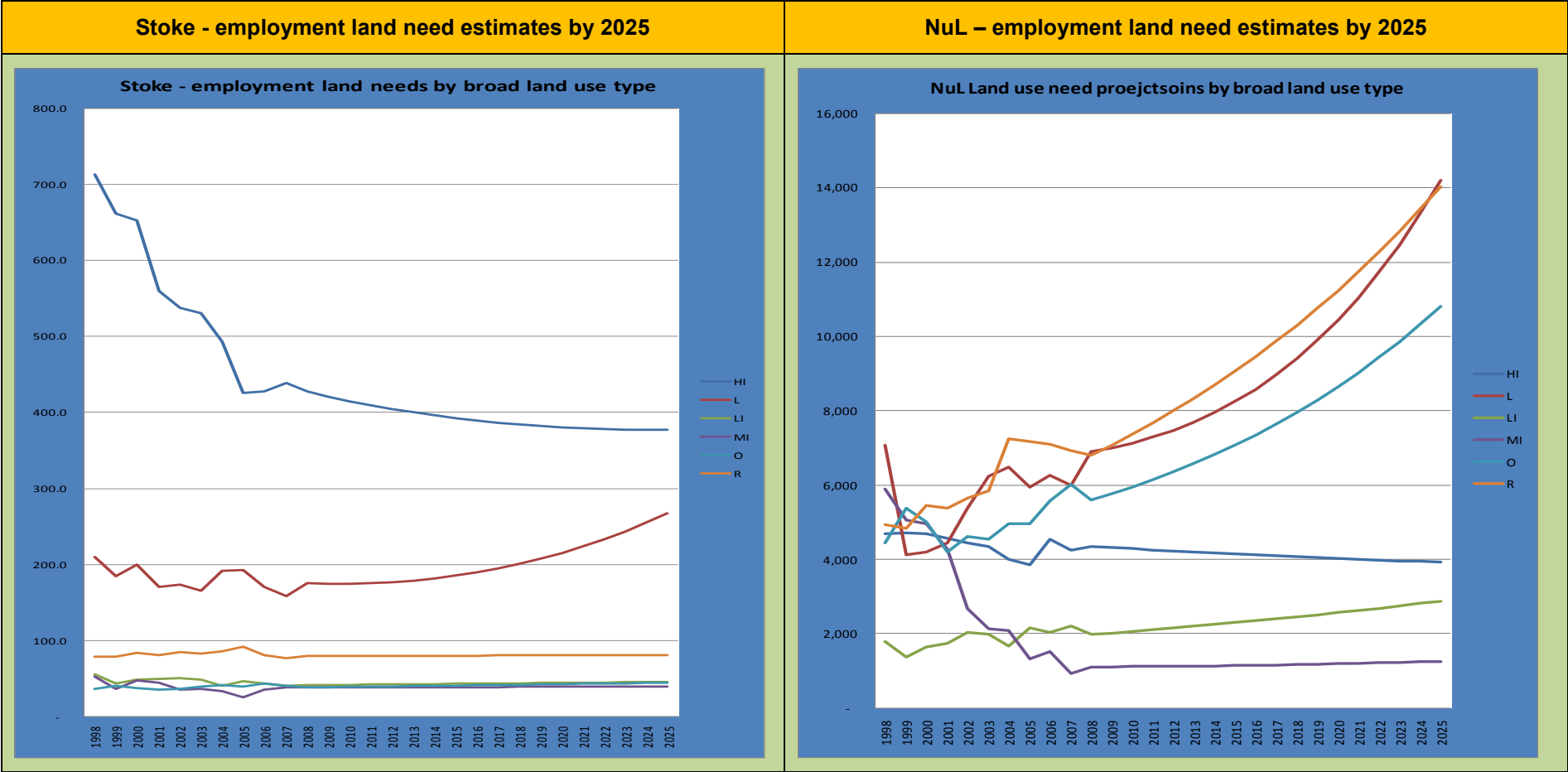
Conclusions - future employment land requirements

- 7.3 We estimate that land (HA) required by 2025 will be in the vicinity of 370 HA. This figure breaks down as follows:
- to meet upgrade/ modernisation needs of existing occupied stock will be
 - = Stoke 124 ha
 - = NuL 45 ha
 - = **Stoke + NuL 170 ha**
 - to accommodate net additional jobs will be
 - = Stoke 103 ha
 - = NuL 104 ha
 - = **Stoke + NuL 207 ha**
 - Totalling.....
 - = Stoke 227 ha
 - = NuL 150 ha
 - = **Stoke + NuL 377 ha**
- 7.4 The following charts show employment land need estimates by 2025 by broad land use type for Stoke and for NuL
- 7.5 The charts suggest the two very different land use type employment scenarios for Stoke and NuL, as follows:

⁶ We've included retail as a 6th category, not because retail activities are included in the employment land assessment but because some of the activities under the retail heading may be warehousing and distribution. We felt that it was important for the study to be cognisant of the scale of employment and hence sites and premises associated with retail. This can be taken into consideration towards the end of the process where we consider a number of factors – quantitative and qualitative – to arrive out our overall judgement of future demand

<u>For Stoke</u>	<u>For NuL</u>
<ul style="list-style-type: none"> ▪ Significant falling requirement for heavy industrial land ▪ Significantly increasing requirement for in logistics land ▪ Limited / static requirement for the other land use types 	<ul style="list-style-type: none"> ▪ Significant requirement for logistics, office and retail land ▪ Limited requirement for light industrial land ▪ Limited decline in requirement for heavy industrial land ▪ Static demand for medium industrial land

7.6 The subsequent three tables provide a detailed breakdown of each set of figures, and, at the bottom, for comparison, show parallel estimates of employment land required to support future small firms growth and to support future inward investment.



STOKE		Final results						
Adding additional land to meet upgrade/modernisation needs		Land HA required by 2025			Land HA required by 2025 (all negatives converted to zero)			
	% of stock in 2010 that will require upgrading/modernisation AND on new land (rather than on existing land)	upgrade HA	HA based on emp growth	Total upgrade and growth	upgrade HA	HA based on emp growth	Total upgrade and growth	
Heavy industrial	20%	83.0	-	44.9	83.0	-	83.0	
Logistics	10%	17.4	92.9	110.4	17.4	92.9	110.4	
Light industrial	20%	8.3	3.9	12.3	8.3	3.9	12.3	
Medium industrial	20%	7.7	0.9	8.6	7.7	0.9	8.6	
Office	20%	7.8	5.3	13.1	7.8	5.3	13.1	
Retail	10%	7.9	1.6	9.6	-	-	-	
		132.2	66.6	198.8	124.2	103.1	227.4	
Inward investment contribution							110.8	49%
Additional small firms (contribution)							61.6	27%



NuL		Final results						
Adding additional land to meet upgrade/modernisation needs		Land HA required by 2025			Land HA required by 2025 (all negatives converted to zero)			
	% of stock in 2010 that will require upgrading/ modernisation AND on new land (rather than on existing land)	upgrade HA	HA based on emp growth	Total upgrade and growth	upgrade HA	HA based on emp growth	Total upgrade and growth	
Heavy industrial	20%	21.5	25.7	47.2	21.5	25.7	47.2	
Logistics	10%	13.2	37.1	50.4	13.2	37.1	50.4	
Light industrial	20%	4.6	20.4	25.0	4.6	20.4	25.0	
Medium industrial	20%	2.9	7.6	10.5	2.9	7.6	10.5	
Office	20%	3.3	13.5	16.9	3.3	13.5	16.9	
Retail	10%	4.9	44.6	49.5	-	-	-	
		50.5	148.9	199.4	45.5	104.3	149.8	
Inward investment contribution							27.8	19%
Additional small firms (contribution)							55.0	37%

Stoke + NuL		Final results					
Adding additional land to meet upgrade/ modernisation needs	Land HA required by 2025			Land HA required by 2025 (all negatives converted to zero)			
	upgrade HA	HA based on emp growth	Total upgrade and growth	upgrade HA	HA based on emp growth	Total upgrade and growth	
Heavy industrial	104.5	- 12.4	92.1	104.5	25.7	130.2	
Logistics	30.7	130.1	160.7	30.7	130.1	160.7	
Light industrial	12.9	24.3	37.3	12.9	24.3	37.3	
Medium industrial	10.6	8.5	19.0	10.6	8.5	19.0	
Office	11.1	18.9	30.0	11.1	18.9	30.0	
Retail	12.9	46.2	59.1	-	-	-	
Total	182.7	215.5	398.2	169.8	207.4	377.2	
Inward investment contribution						138.6	37%
Additional small firms (contribution)						116.5	31%

8. Inward investment analysis

8.1 In-Staffs provided us with a database recording all past inward investments over the period 2006 to 2010 (midyear).

- Inward investment is defined as projects from or funded from outside the UK and also from within the UK but outside of the area – hence the database includes domestic projects as well as foreign
- We also understand that re-investment was included alongside new investment. Some reinvestments also coincide with a relocation of existing activity within the area

Conclusions

8.2 We estimate that additional inward investment between 2010-25 will required the following land

- Stoke 111 ha
- NuL 28 ha

Further details of the analysis

8.3 The database suggests that 3,200 jobs were generated by inward investment (as defined) over the 3 and a half year period (2006-10 midyear), requiring 123,000 sq m of floor space (c. 1.2 million sf).

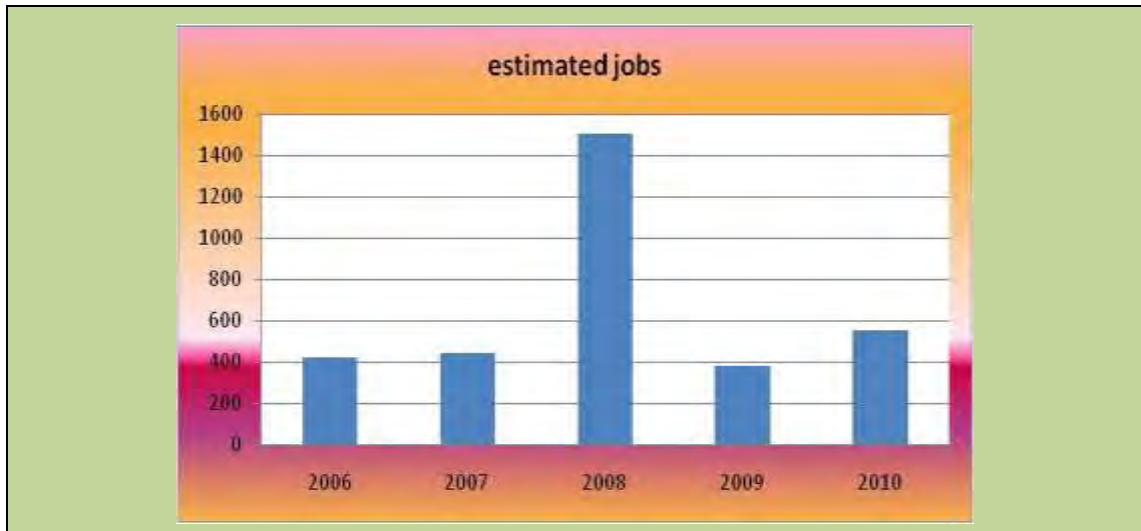
Analysing inward investment by jobs and floor space

8.4 Inward investment peaked in 2008

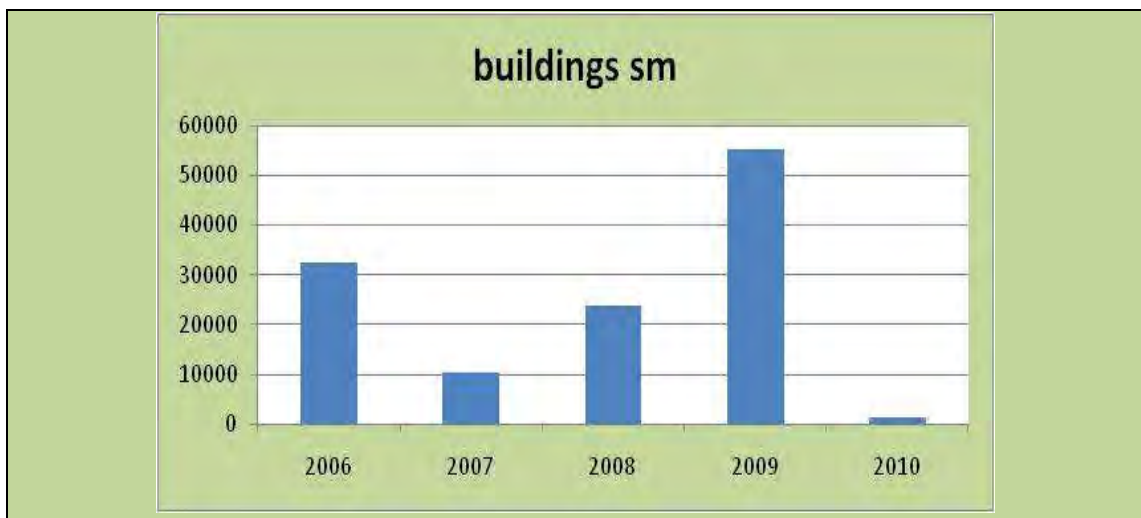
all projects in all areas by year						
estimated jobs			buildings sm			sf per job
2006	418	13%	2006	32,615	26%	840
2007	305	10%	2007	10,355	8%	365
2008	1,589	50%	2008	23,803	19%	161
2009	844	26%	2009	55,120	45%	703
2010	45	1%	2010	1,352	1%	323
Total	3,200	100%		123,245	100%	

8.5 Jobs generated by the inward investment are spread across the period as follows

- C. 1,500 jobs in the peak year of 2008
- And an approximate average of 4-500 jobs per year in the other years (please note that the actual figure for 2010 may be higher as the data base only captures projects to mid year)



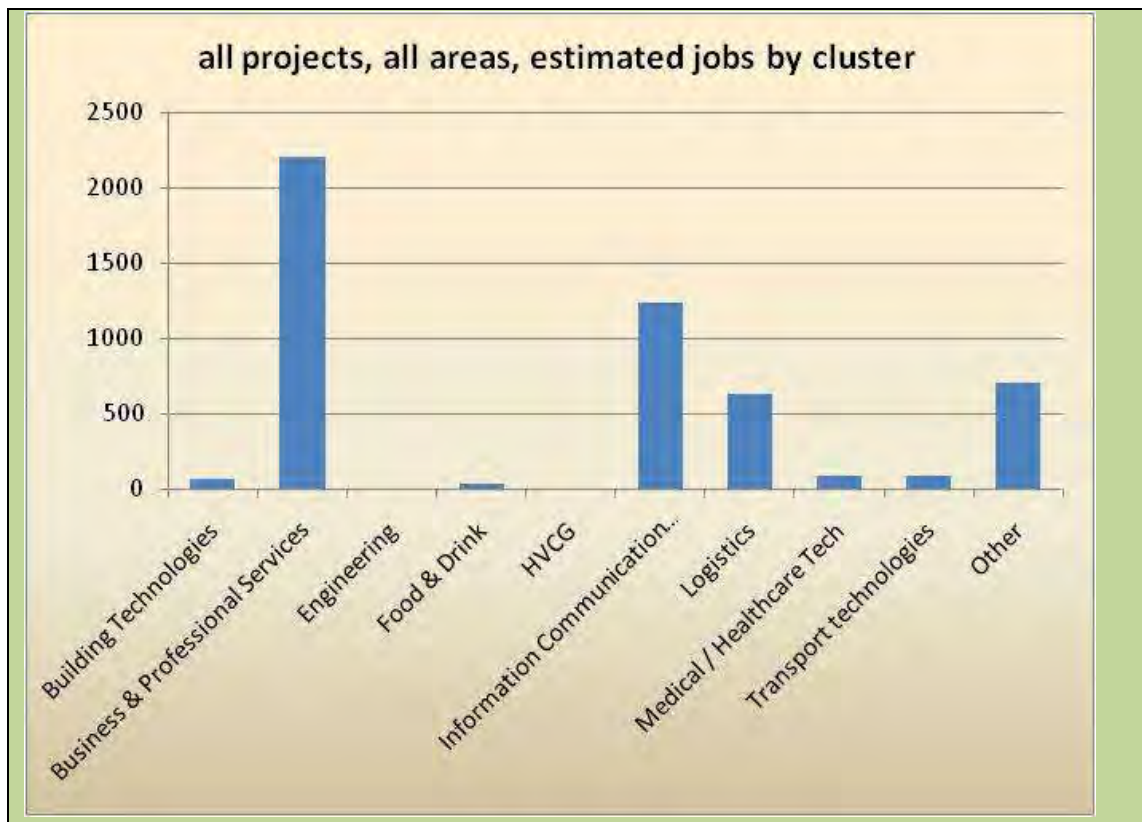
8.6 The profile of floor space per year does not however correspond to the profile of jobs over the period. This we believe is because of the significant distortion resulting from substantial warehousing/ logistics investment, as indicated by the subsequent table



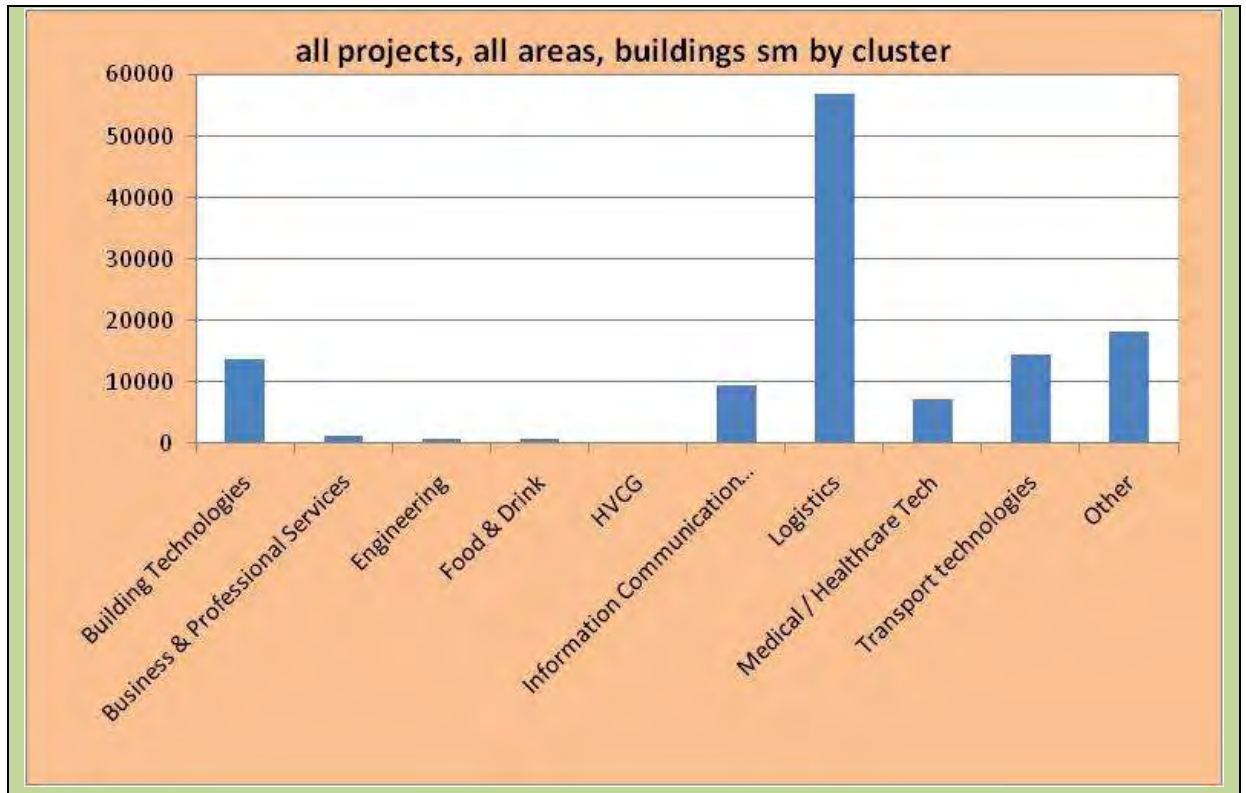
all projects all areas by cluster					
estimated jobs			buildings sm		
	jobs			sq m	
Building Technologies	65	2%	Building Technologies	13,800	11%
Business & Professional Services	163	5%	Business & Professional Services	1,310	1%
Engineering	10	0%	Engineering	750	1%
Food & Drink	31	1%	Food & Drink	800	1%
HVCG	6	0%	HVCG	295	0%
Information Communication Tech	1,207	38%	Information Communication Tech	9,388	8%
Logistics	916	29%	Logistics	56,880	46%
Medical / Healthcare Tech	222	7%	Medical / Healthcare Tech	7,182	6%
Transport technologies	175	5%	Transport technologies	14,532	12%
Other	406	13%	Other	18,308	15%
Total	3,200	100%		123,245	100%

Analyzing inward investment by cluster

- 8.7 The database allows us to review projects by cluster (or by broad sector)
- The majority of jobs are associated with business and professional services inward investment
 - The second highest with ICTs
 - The third highest fall into ‘the other category’
 - With logistics in fourth place



8.8 When we look at floor space, logistics is however in first place



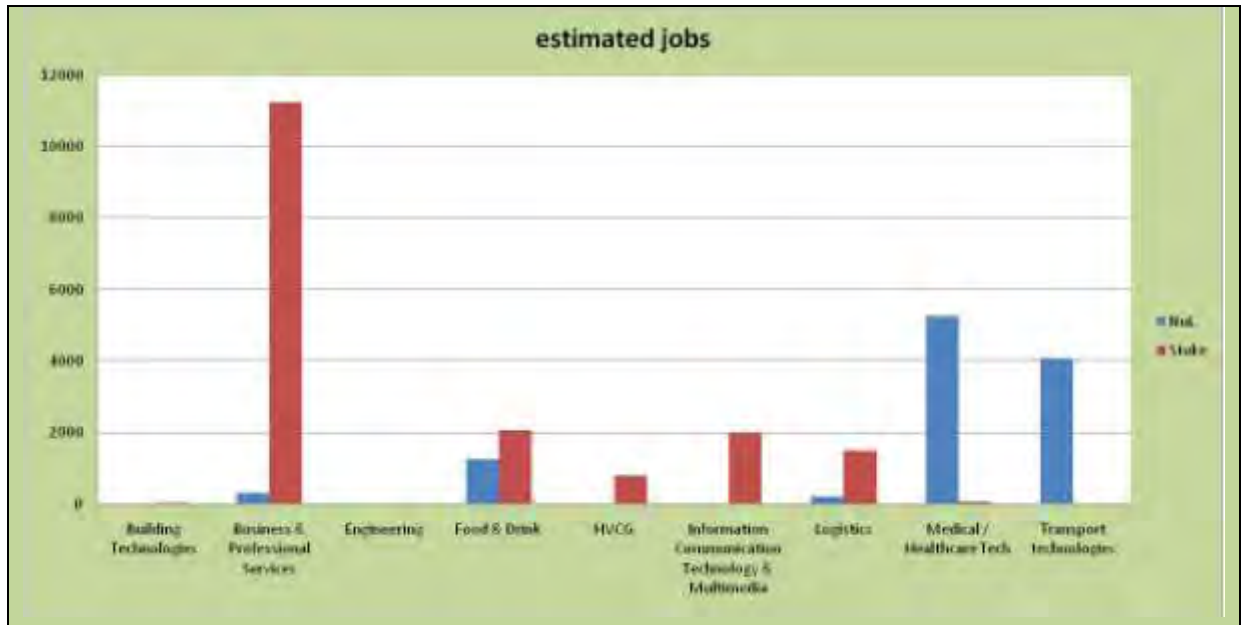
Differentiating between Stoke and NuL Inward investment

8.9 Inward investment over the period generated 2,300 jobs (requiring 95,000 sm of space) in Stoke and 875 (requiring 24,000 sm of space) in NuL.

- In Stoke, the cluster generating the most jobs was ICTs (1,207), followed by Logistics (698)
- In NuL, the cluster generating the most jobs comes under the category of 'other' (265); closely followed by Logistics (213) then medical/ health care (159)

Projects by cluster	Estimated jobs				buildings sm			
	NuL		Stoke		NuL		Stoke	
Building Technologies	20	2%	45	2%	500	2%	13,300	14%
Business & Professional Services	69	8%	94	4%	300	1%	1,010	1%
Engineering	-	0%	10	0%	1	0%	750	1%
Food & Drink	16	2%	16	1%	500	2%	300	0%
HVCG	-	0%	6	0%	-	0%	295	0%
Information Communication Technologies	-	0%	1,207	53%	-	0%	9,388	10%
Logistics	213	24%	698	31%	-	0%	56,630	59%
Medical / Healthcare Tech	159	18%	63	3%	6,650	27%	532	1%
Transport technologies	134	15%	1	0%	11,132	46%	100	0%
Other	265	30%	140	6%	5,367	22%	12,909	14%
Total	875	100%	2,279	100%	24,450	100%	95,214	100%
			3,154				119,664	

8.10 The following chart illustrates visually the significant contrasts between the two areas in terms of inward investment employment



Estimating future inward investment floor space and land needs

- 8.11 The following two tables set out the calculations made to estimate future inward investment floor space and land needs for both areas
- 8.12 To arrive at these estimates, we have assumed that past trends, as indicated by the database, continue into the future.
- 8.13 Clearly this needs to be treated with a degree of caution however
 - First the time period covered by the database is short
 - Second the impact of the recession and future patterns of recovery are not yet fully clear regarding inward investment
- 8.14 This said, the team’s in-depth consultation with developers, land owners and other key stakeholders close to the market, suggest that significant inward investment opportunities remain for both areas and are likely to be one of the key sources of investment and jobs going forward

NuL floorspace sq m						
	Heavy industrial	Logistics	Light industrial	Medium industrial	Office	Retail
Building Technologies	250	-	-	200	50	-
Business & Professional Services	-	-	-	-	300	-
Engineering	0	-	0	1	-	-
Food & Drink	-	150	-	350	-	-
HVCG	-	-	-	-	-	-
Information Communication Technology	-	-	-	-	-	-
Logistics	-	-	-	-	-	-
Medical / Healthcare Tech	-	-	-	6,650	-	-
Transport technologies	-	3,340	2,226	5,566	-	-
Other	805	1,342	805	1,342	1,073	-
Total	1,055	4,831	3,032	14,108	1,423	-
<i>Dev density</i>	<i>3.00</i>	<i>2.00</i>	<i>2.00</i>	<i>2.00</i>	<i>2.00</i>	<i>3.00</i>
Land take HA	0.32	0.97	0.61	2.82	0.28	-
Total land take HA						5.00
Land take pa						1.11
Land take 2010-25						27.75

Stoke floorspace sq m						
	Heavy industrial	Logistics	Light industrial	Medium industrial	Office	Retail
Building Technologies	6,650	-	-	5,320	1,330	-
Business & Professional Services	-	-	-	-	1,010	-
Engineering	150	-	225	375	-	-
Food & Drink	-	90	-	210	-	-
HVCG	295	-	-	-	-	-
Information Communication Technology	-	-	5,633	-	3,755	-
Logistics	-	56,630	-	-	-	-
Medical / Healthcare Tech	-	-	-	532	-	-
Transport technologies	-	30	20	50	-	-
Other	1,936	3,227	1,936	3,227	2,582	-
Total	9,031	59,977	7,814	9,714	8,677	-
<i>Dev density</i>	<i>3.00</i>	<i>2.00</i>	<i>2.00</i>	<i>2.00</i>	<i>2.00</i>	<i>3.00</i>
Land take HA	2.71	12.00	1.56	1.94	1.74	-
Total land take HA						19.95
Land take pa						4.43
Land take 2010-25						110.81

9. Small firms analysis

9.1 Small firms typically account for 80% plus of firms in any local economy and Stoke and NuL are no exception. The number of small firms, nationally, is anticipated to rise, for a variety of reasons, hence understanding the quantum of small firms in the two economies, how this may change, and hence their premises requirements is an important part of the exercise

Data sources

9.2 We've gained an insight into small firm trends and needs through analysis of two complimentary data sets

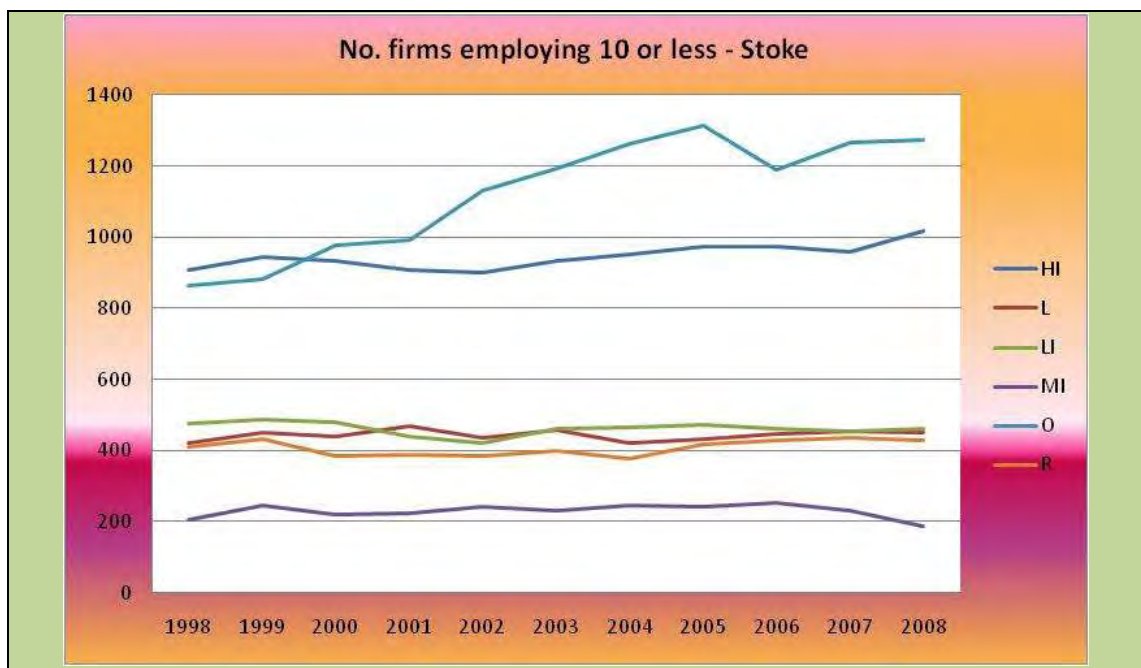
- ABI firm size data – we were able to undertake a fine grained analysis based on the 2-digit SIC classification
- VAT data – in contrast, we could only undertake a high level analysis, limited by the 7 to 8 broad industry categories by which VAT data is collected, but VAT data allows us to look at new starts as well as net change

ABI analysis

9.3 Analysis of the ABI data shows that small firms (those employing 10 or less) have grown in numbers in both areas, but particularly in NuL

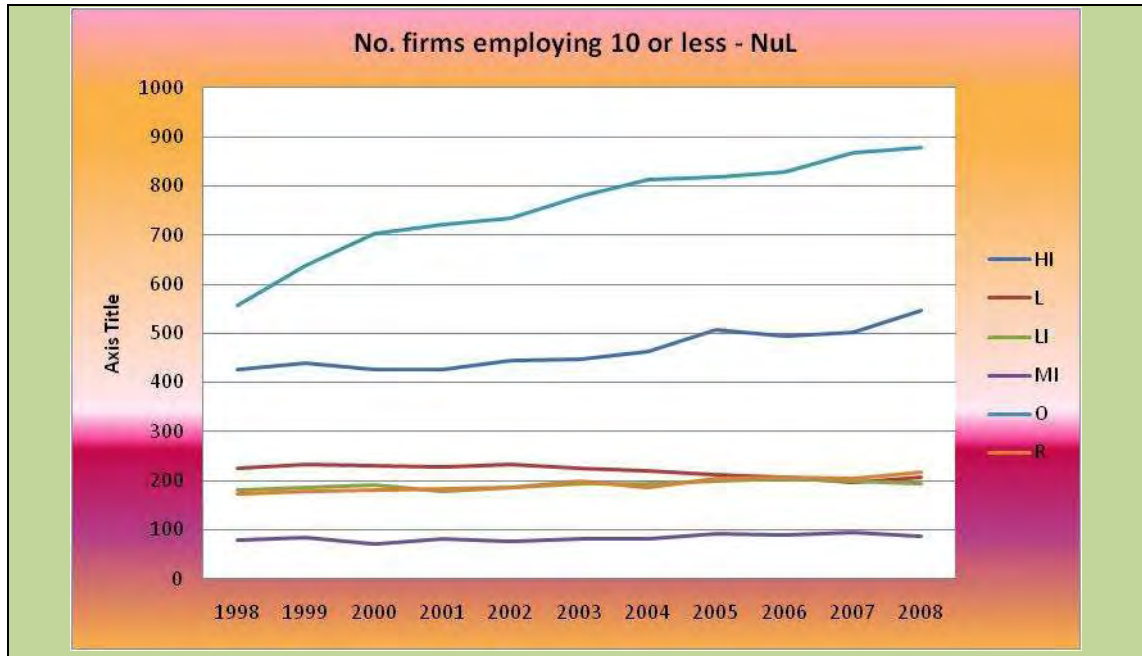
9.4 In Stoke, the following chart shows that

- The number of small firms requiring office space has increased the most
- Those in the heavy industry sector have increased the second most
- Those in the medium industry sector have fallen in number
- With the other broad sectors remaining roughly static over the period

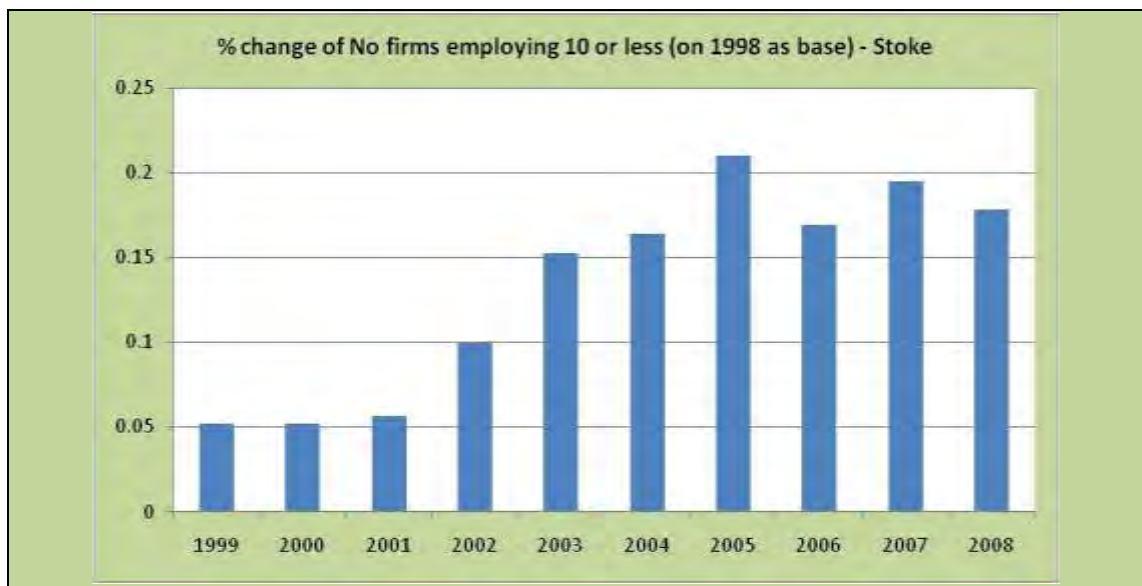


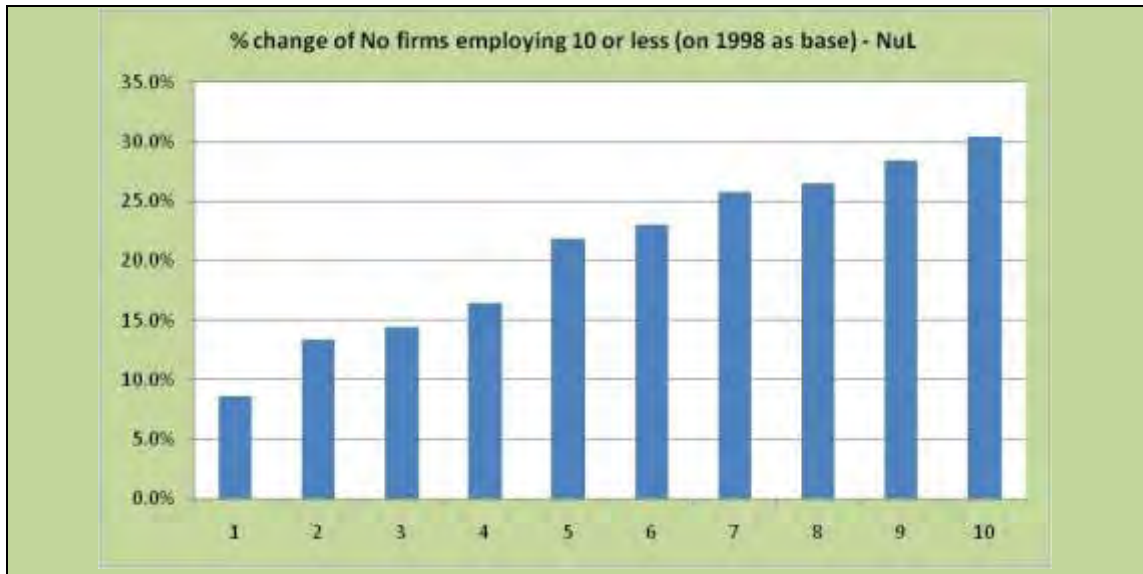
9.5 In NuL, the following chart shows that

- Small firms requiring office space have grown in number the most, almost doubling over the period
- With small firms in the heavy industry sector the second most
- The other sectors have more or less flat-lined over the period



9.6 The following two charts show how the rate of growth has increased over the period in both areas





Estimating future land needs for small firms

9.7 We have assumed that the increase in number of small firms will continue and have estimated future growth and consequent land needs based on this.

- Additional small firms in Stoke will required 61.5 HA of land, accounting for 27% of total additional land needs
- Additional small firms in NuL will require 55 HA of land, accounting for 37% of total additional land needs
- Stoke and NuL together, will required 116.5 HA of land to accommodate small firm growth (accounting for 31% of total additional land needs)

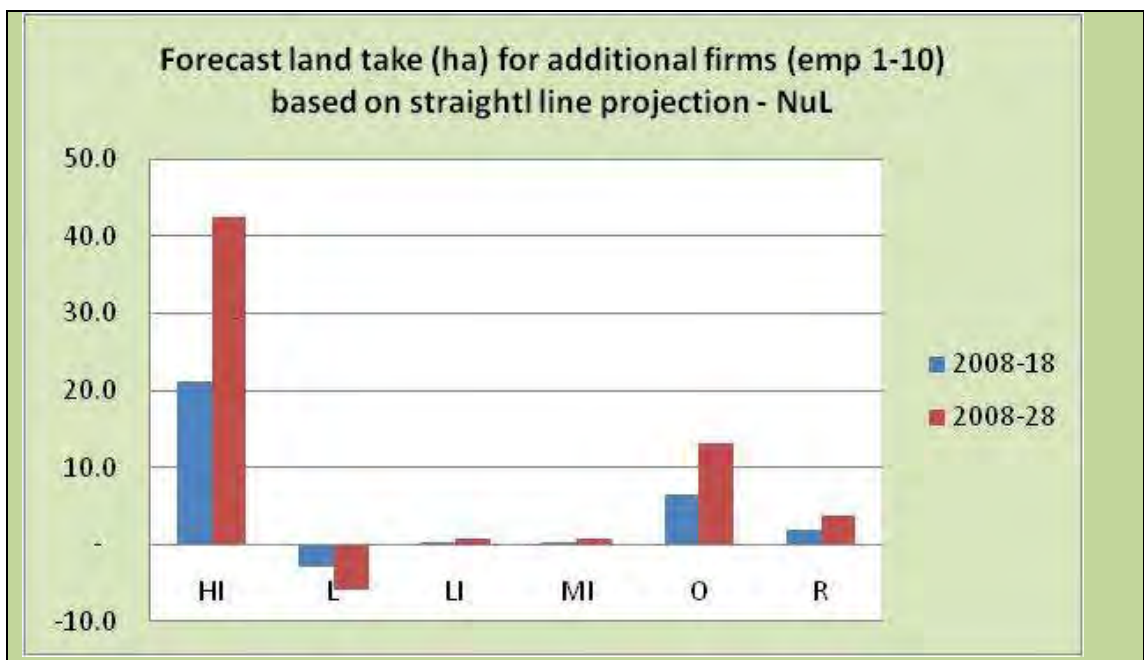
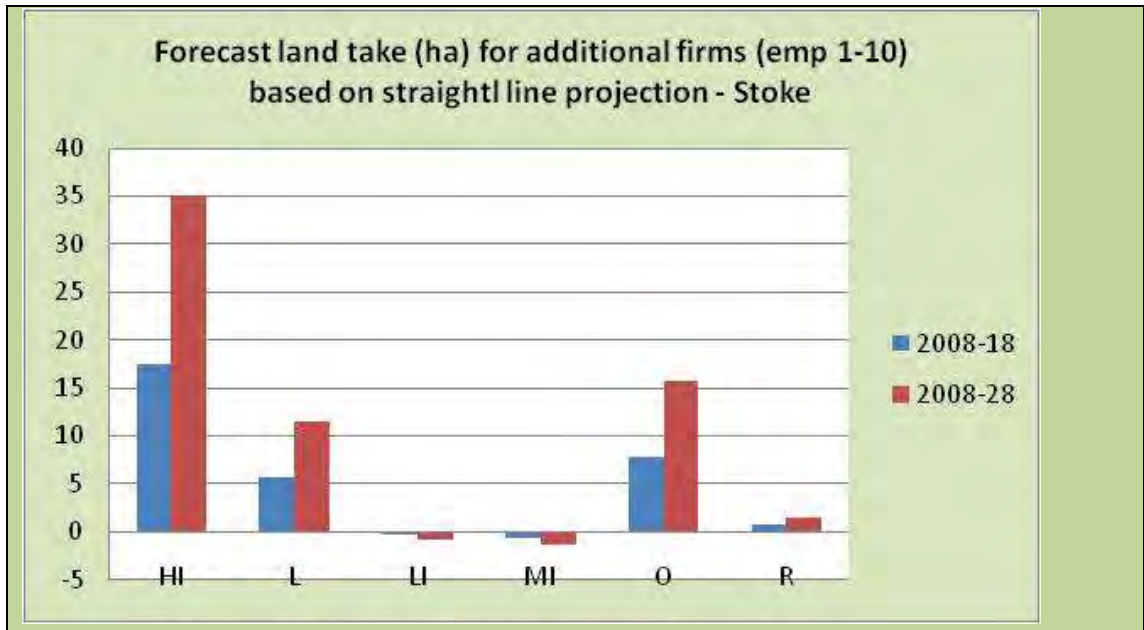
Additional land required to support small firm growth and inward investment in Stoke and NuL by 2025

	<i>Additional land required (HA) by 2025</i>	<i>% of total additional land required</i>
Stoke	61.6	27%
NuL	55.0	37%
Stoke+ NuL	116.5	31%

Breakdown of future small firm land needs by broad land use type

9.8 The following two charts provide a breakdown of future small firms land needs by land use type

- In both areas, small firm growth in the heavy industry sector is anticipated to require the most land
- Small firm growth in the office sector, the second most
- And logistics the third most (in Stoke only)



10. Translating broad employment land forecasts into demand for specific types of sites and premises

10.1 To this point, we've assessed the likely future demand/need for 5 broad types of land and premises⁷. Whilst useful when considering broad land supply issues, it is also important to go one step further and to seek to translate these broad estimates of future demand/ need into specific types of floor space, premises and sites that the Stoke and NuL economies will need as they modernise and transform.

10.2 We've adopted the following approach to do this

- First, we've undertaken an independent high level assessment of both economies, identifying those sectors (and niches) likely to offer most growth opportunity going forward. This begins to provide a better qualitative understanding of the specific economic activities that will require sites and premises
- Second, we've formulated a typology of reflects the specific sorts of floor space, premises and hence sites, that former industrial economies, like Stoke and NuL, will require as they evolve and modernise
- Third, drawing on the team's in-depth consultation with developers, land owners and other key stakeholders in the market, we've identified the types of sites and premises that the market thinks will be required and that the market is willing and able to provide

10.3 Triangulation of these three considerations has then enabled the team to form clear views on the specific needs of both economies going forward – for sites and for premises

Identifying key sectors and niches offering the most growth opportunity

10.4 The principal question for a given locality is the implications of the underlying longer term trends driving the re-structuring/ reinvention of the UK's global economic role, rather than the shorter term cyclical ups and downs

10.5 Local economic policy can probably do more to respond to longer term opportunities than it can to address short term shocks.

10.6 The principal issue therefore is whether your area is in the right location with the right industrial structure to benefit from transition, or if it is a victim...and if a victim....the principal question is what to do about it

10.7 Stoke-NuL is one of the most serious casualties of economic transition....but it has some assets enabling it to secure a share of new high growth sectors and markets

10.8 The right local economic development policy is essential though..to put in place the necessary building blocks...and as part of this the right land and premises policy is essential

10.9 To understand what these are, we need to look more closely at the way the economy is restructuring and at potential growth sectors/ niches.

Rationale for identifying sectors offering growth opportunity

10.10 Growth sectors are driven by a combination of

- High growth markets – nationally/ globally
 - = New technology...i.e....digital, new materials
 - = New regulations/ policy objectives i.e. Low carbon

⁷ Six if we include retail

- = Emerging new markets – aging population, new countries
- Local sources of competitive advantage
 - = Natural resources/ natural environment – these are given, the issue is identifying and optimising them
 - = Investment in infrastructure, skills and knowledgebase – this includes major past (legacy) investment, but also new investment
 - = Catalysts/ triggers that exploit these – major dynamic inward investor, rapid growth local firm, dynamic cluster

Applying this rational to the Stoke and NuL economy

10.11 The following table sets out a very high level assessment of the key sectors and niches that offer most opportunity going forward and of the specific needs of each. This is not based on a detailed study but instead is based on Adroit’s in-depth experience of identifying key growth sectors and on the team’s knowledge of Stoke and NuL.

Sector/ niche	Opportunity & progress	Need
Health (med-tech)	Regions with strong research base, specialist skills base, engineering cluster and available lab space can capture growing share of this market	Provision of more expensive lab facilities with proximity to skills and research base
Renewable energy	Emergent – develop supply chains, installation and servicing	Pilot programmes– industry, residential, public sector Skills training centre combined with pilot/ technical service centre
Electric Vehicles	Most main UK primes likely to manufacture their electric car to serve European market – starting 2015 onwards. Opportunity to gain share of supply chain, of distribution and servicing – and charging infrastructure	Explore and promote opportunities to local manufacturing base Market motorway sites to inward investors Pilot Evs and EV charging infrastructure
Ceramics	Unique legacy skills and tacit knowledge base – already attracting new investment	Right types of space in right locations Retraining/ deskilling and assistance to work
Digital	Everywhere can join this party – grow the local IT/digital/creative sector Also, ensure wider economy adopts and exploits ICTs – c.£3.3bn GVA uplift in region over next 5-7 years	Aggressive ICT business support programme Aggressive ICT skills programme Aggressive support to local IT sector Pro-actively explore commercial deployment of world class broadband (FttP)
Wider manufacturing	Only broad sector that has shown strong employment growth – we need to understand this more???	Right types of space in right locations Retraining/ deskilling and assistance to work Research wider needs of this sector
Logistics	Motorway proximity will continue to attract mobile logistics operations	Sites with immediate motorway access offering right space on right terms
Financial and business services	Motorway proximity will continue to attract regional and national (back office) functions	Sites with immediate motorway access offering ready-to-occupy space – especially including small flexible units

Types of sites and premises essential for economic revival and modernisation of the economy

Role of Property in economic revival

10.12 The availability (and choice) of the right sites and premises, at any one time, is an important component of economic revival.

Site and premises are primarily an enabler

- Lack of supply of the right types of sites and premises, in the right place, on the right terms will frustrate/ prevent growth
- The issue for the economy is not total quantum of supply but that there is immediate availability and choice, across the portfolio, and any one time and at all times

In some cases, specialist sites and premises can also act as catalyst and drive growth

- Flagship, highly visible, high profile, high-tech looking business parks, distribution parks
- Science parks – especially those providing specialist accommodation, supported by expensive infrastructure and technical services
- Start-ups space – specialist incubators, high profile business centres

The wrong portfolio of sites and premises can have a catastrophic impact on growth

10.13 It is important not to under estimate the implications of getting it wrong. If established firms can't upgrade and/or find additional space, this will frustrate growth and damage competitiveness

One of the most common failures is availability of suitable space for small firms

Small firms make up 80+ % of businesses – and growing

They have very specific needs, which if not met, can stop them starting, can stop them growing

- Right location and security are first requirements
 - Different for offices and workshops
- Small spaces – office (150-500 sf); workshop (500-1,000 sf)
 - Former industrial economies tend to offer mainly larger spaces, in wrong locations and of poor quality
- Flexible tenure – easy-in, easy-out...plug and play...is very important
 - Requirement to sign a lease for 3, 5 7 years often a major barrier
- Reasonable service charges
 - Excise add on costs is a barrier
- Rates are a big issue
 - And is reason why so much secondary space is not let to micro firms on flexible terms
- Broadband at consumer prices is a given
 - Higher symmetric bandwidth is a positive advantage to a growing number

Home 'working' is also an increasingly important source of employment space

10.14 Home working is already significant and is set to grow

- Employees who work from home some or all of the time
- Self employed and micro firms, based at home

10.15 Key enablers are

- Space – office space, workshop space (shed, garage)
- Broadband – 2Mbps no longer good enough, need at least 6-8Mbps. Soon this won't be good enough and will need NGB

10.16 Availability of local drop-in centres potentially also important

- Dedicated hot-desk centres don't seem to work very well
- Costa etc plays this role to an extent
- Need to think clever – library, community centre, school?

Types of floor space, premises and sites required by a modernising economy

10.17 The following table sets out a list of the specific types of floor space, premises and sites required by a modernising economy

R	Home
B1	Town centre/ suburban secondary property market
B1	Bespoke office building in town centre/ suburbia
B1	Stand alone enterprise centre/ incubator
B1	Business Park/ Science park - incubator
B1	Business Park/ Science park - grow on and larger space
B1	Stand alone managed workshops
B1/2/8	Trading estate - mixed use light industrial/warehouse park
B1/2/8	Standalone manufacturing site
B8	Dedicated logistics park
B2	Heavy industrial park/ area

10.18 The following table matches the above typology to the main types of economic activity in an economy, indicating in particular which types of property are most relevant to which sizes of firm.

	Office activities	Light manufacturing activities	Heavy industrial activities	Storage and distribution activities
Home	micros	micros (v light activity in garage or shed)	X	X
Town centre/ suburban secondary property market	micros and mediums	micros (v light)	X	X
Bespoke office building in town centre/ suburbia	micros, mediums and large	X	X	X
Stand alone enterprise centre/ incubator	micros	R&D/ prototyping micros	X	X
Business Park/ Science park - incubator	micros	R&D/ prototyping micros	X	X
Business Park/ Science park - grow on and larger space	mediums and large	R&D/ prototyping mediums	X	X
Stand alone managed workshops	X	micros	X	X
Trading estate - mixed use light industrial/warehouse park	mediums	all sizes	X	micro/medium
Standalone manufacturing site	ancillary	large/ very large	large/ very large	ancillary
Dedicated logistics park	ancillary	ancillary	X	medium/large/v large
Heavy industrial park/ area	ancillary	ancillary	all sizes	ancillary

Estimating broad quantum’s of floor space, premises and sites likely to be required

- 10.19 We are now in a position to combine the quantitative floor space and land demand estimates with the above qualitative assessment of the economy and of the property market, to arrive at broad indications of the quantum of space likely to be required under each heading.
- 10.20 This will be undertaken in stage two of the work.

9.5 Appendix 4 – Factual Review of competitor areas – Derby and Wolverhampton

DERBY – Population: 244,130 (mid-2009 estimate from ONS)

Background to the Area:

9.5.1 Traditionally Derby has relied on its advanced engineering industries which created large swathes of manufacturing land, particularly for its specialist rail and aerospace industries. This heritage remains though for various reasons the city centre has suffered from a lack of investment, leading to a poor quality stock of offices. However this has not impacted too badly because of the success of Pride Park – an 80 hectare business park built over a ten year period on former rail-related manufacturing works to the south western edge of the city centre. It is approaching complete build out and demand is still considered to be strong for large allocations (such as Raynesway and Chellaston Business Park – see below) from developers and occupiers. Stakeholders in Derby generally want to see more land come forward. There is limited large scale distribution demand in Derby because of relatively high land values and better alternative options elsewhere.

Employment Land Overview:

9.5.2 Derby City Council, Amber Valley Borough Council and South Derbyshire District Council jointly commissioned the preparation of an Employment Land Review (ELR) of what is known as the Derby Housing Market Area (HMA) in 2008. Its purpose was to consider the areas employment land requirements up to 2026 (the period covered by the Regional Spatial Strategy) and to review the quantity and quality of the HMA's existing and allocated employment land supply.

9.5.3 The study noted that most of the immediately available land in Derby was small in-fill sites, many with development proposals attached. The next tranche of land was dependent upon the servicing of a site known as Chaddesden Sidings (to expand the Pride Park area) and the Raynesway site – which is approximately 20 hectares and is targeted for B1 and B2 uses, and is effectively the logical follow-on site to Pride Park, though further removed from the city centre. However over 58% of the allocated employment in Derby land lacked services and access at the time of the ELR – including large allocations such as Chellaston Business Park (86.6 hectares) and Acordis Spondon (39.2 hectares).

9.5.4 In total Derby had 232.4 hectares of allocated employment land in 2008, of which 21.5 hectares was deemed as immediately available, and 97.14 hectares deliverable within three years. Take up figures since 2008 have been low – with new employment development hovering around the 5 hectare mark in 2008, 11 hectares in 2009, and dropping to less than 3 hectares in 2010. The 2010 Annual Monitoring Report (AMR) for Derby notes: 'The level of additional completions has gradually decreased since the 2005/06 monitoring period as popular sites such as Pride Park have neared

completion and, due to the recession, a lack of readily available new sites have come on stream.'

Agent's Views:

- 9.5.5 Linking in with the findings from the AMR commercial agents noted that the East Midlands economy generally has had a rollercoaster few years – it fell as a whole by 6% year on year between 2008 and 2009 (West Midlands fell by 5.5% in the same period), but rose by 3% in 2010 (West Midlands saw just 1% growth).
- 9.5.6 Locally, market conditions remained difficult throughout 2010 in Derby, but it was felt they showed improvement on 2009. Overall the level of enquiries remain low, however a reduced supply of good quality accommodation is now beginning to match the levels of demand. Occupiers are taking advantage of the deals available in the market, whether through discounted pricing or substantial incentives packages. The limited availability of funding is impacting on freehold take-up, with some businesses unable to move. Much of the new build stock is gradually being taken up and with limited speculative development. Poor quality stock in secondary locations continues to struggle and across the East Midlands generally the desire is for modern space along the M1 corridor or in major industrial estates.
- 9.5.7 Prime industrial rents in Derby typically hover around the £56-£57 per sq m per annum level, ahead of the Black Country (£53-£54), and Wolverhampton (£48-£49), but behind the East Midlands' prime hubs of Leicester (£59-£60) and Nottingham (£61-£62). Pricing is likely to remain stable for the foreseeable future in prime locations with downward pressure on secondary locations.
- 9.5.8 In terms of the office market, conditions are now starting to balance – frustrated latent demand is beginning to be able to upgrade to better space at reduced costs. There will be significant growth in second hand office supply, and a continued lack of Grade A office space due to a lack of speculative development. Dated stock in Derby (as elsewhere) has a bleak future – with the cost of refurbishment, long voids and low rents sterilising its viability. Prime office rents will hold due to a lack of stock.
- 9.5.9 It is widely recognised that Midlands generally has a strategic location that is a key asset in the continued growth of internet retailing. Agents know there are active requirements from retailers for 'big sheds' with many seeking land for self-build – and Derby needs to bring forward sites more quickly to capitalise (a key new junction serving Raynesway opened in February 2011 which is a key step forward for Derby). Some agents noted a potentially more significant dearth of available sites has actually been avoided to a degree by the recession slowing take-up, but key major new allocations still need to be brought forward as soon as possible. Growth in demand for industrial land for recycling and green energy uses is set to continue. The volume of secondary market stock will remain high. It was noted that across all cities developers are increasingly seeking to secure positions on strategic development land in anticipation of improved conditions.

WOLVERHAMPTON – Population: 235,800 (mid-2007 estimate from ONS)

Background to the Area:

- 9.5.10 As Stoke & Newcastle sit at the heart of a recognised wider sub-regional market, Wolverhampton is viewed as a key centre at the heart of the Black Country market area. The four constituent Black Country Local Authorities (Dudley, Sandwell, Walsall and Wolverhampton) worked together to produce a Black Country Core Strategy (BCCS) and employment site policy is derived at this strategic level. The BCCS deals not only with land use but also environmental, economic and social issues and sets out the vision, objectives and strategy for future development in the Black Country to 2026. The Core Strategy is a Development Plan Document and forms the basis of the Black Country Local Authorities' Local Development Frameworks. A joint Employment Land Review of the four authorities was undertaken in 2008, building a demand assessment into the comprehensive 2005 Black Country Study which had examined the capacity of employment land available.
- 9.5.11 Wolverhampton's population peaked in the early 1970s at around 269,000 and has steadily fallen since. The town has relatively good communication links, with access to the motorway network provided by the M6 to the east of the city and the M54 to the north. A bypass around Wednesfield, to the northeast of Wolverhampton, was completed in 1999, as was the first Midland Metro line running between the city centres of Birmingham and Wolverhampton, with a journey time of just under 20 minutes – further Metro extension plans are currently being reviewed. Nonetheless, congestion on the M6 has always been a major issue, though some alleviation has been reported since the M6 Toll opened.

Employment Land Overview:

- 9.5.12 As of 2008 Wolverhampton had a total employment land capacity of between 568ha and 802ha (effectively 802ha existed – the difference between the figures represents flexibility for potential residential development on employment sites). Consultants undertaking the study deemed 111ha of the 802ha to be 'High Quality' i.e. likely to be able to attract non-local growth and investment.
- 9.5.13 Subsequently at the end of 2009 a more detailed assessment of supply was undertaken across the Black Country, and sites scored as High Quality; Potential High Quality and Local Quality. This study assessed all of Wolverhampton's existing employment sites (55 in total) through an assessment matrix and deemed that ten sites, totalling 114.53 hectares, was of High Quality, and that a further eight sites, totalling 245.61 hectares, was of Potential High Quality. A detailed demand assessment using trend analysis and econometric forecasting suggested that a total of 347.4 hectares (high growth scenario) of employment land would be needed to 2026 to accommodate new growth in the B1, B2 and B8 sectors (plus an 'automotive' sector that stands alone from the 'B' use classes in the Black Country studies). Effectively therefore in quantitative terms at least Wolverhampton's high quality and sites with potential can meet demand without requiring local quality sites.

- 9.5.14 Wolverhampton sits on the western edge of the Black Country and the wider West Midlands conurbation, so unsurprising the focus of economic development tends to be south and east of the City Centre, as well as the Centre itself. The principal areas are:

Bilston Corridor:

- 9.5.15 In the south east of the borough, stretching along the canal and Metro line between Wolverhampton City Centre and Bilston Town Centre, the Corridor is a focus for regeneration and environmental transformation. Bilston has three employment sites deemed to be of high quality, but only totalling 51.65 hectares, a relatively small amount for the scale of the area.

City Centre:

- 9.5.16 Wolverhampton is aiming to develop a City Centre that will be an 'established, confident centre with a wide variety of quality shops and cultural attractions, 21st century offices, urban living and a city-scale public transport interchange'. Notably the City Centre has no employment sites deemed as High Quality or Potential High Quality.

Stafford Road and Pendeford:

- 9.5.17 Stafford Road (A449) is the key northern artery into Wolverhampton. A single site of 15.37 hectares is considered 'High Quality' at present – however, a further three sites, totalling 49.07 hectares have been deemed 'Potential High Quality', indicating the area's capability to deliver longer-term economic growth. Lying north of Stafford Road, the Pendeford area is focused around the M54 Junction 2, together with the i54 site, will have fulfilled its potential to become one of the premier employment locations in the West Midlands. The i54 is a 220 acre (96 hectare) site at Wobaston Road, Pendeford, on the boundary of South Staffordshire and Wolverhampton which is under development for a technology-based business park. The site is on the northern side of Wobaston Road, just to the west of the Staffordshire and Worcestershire Canal with the M54 motorway running across the northern part of the site.

- 9.5.18 In summary, analysis of Wolverhampton's stock of employment land suggests that the north of the City will become increasingly key to future employment development and in theory more of a direct threat to Stoke and Newcastle given its excellent accessibility to the motorway network at the M54 that reduces the advantage Stoke/Newcastle has of being better placed than Wolverhampton for the northern markets coupled with its greater proximity to the West Midlands market.

Agent's Views:

- 9.5.19 Wolverhampton has seen relatively healthy take-up of employment land in the past couple of years (8.35 hectares in 2008/09 and 7.96 hectares in 2009/10 – compared to just 1.6 hectares in 2007/08) which has been principally due to two significant completions (a former Corus site taken up for steel storage and part of a former Rolls Royce site being developed as a motorcycle test centre). There is considered to be a good range of available employment land in suitable locations by both the Council and

- local agents. Consequently little development tends to occur on greenfield sites (99.5% of all 2009/10 employment development was on previously developed land).
- 9.5.20 Whilst the West Midlands is starting to see a strengthening office market Wolverhampton is over supplied with low grade office stock and suffers from proximity to Birmingham, where good deals on Grade A space are relatively easy to agree at present.
- 9.5.21 Whilst considerable media focus has been witnessed on the decision by Moog Inc., a US-based precision engineering company, to become the first tenant at i54 in a purpose built 250,000 sq ft unit, it was noted that the firm is simply moving its existing Wolverhampton operations from a nearby site. However, the move does safeguard jobs that would most likely have been lost as Moog sought expansion – and even though technically the new development is in South Staffordshire – there is a recognition that i54 is key to Wolverhampton’s future and anticipated to become a very successful cluster of technology businesses over the next few years employing anywhere from 4,000-6,000 dependent on various expert opinions.

9.6 Appendix 5 – Map of the new Portfolio of Employment sites

9.7 Appendix 6 – Summary of Stage 2 Site Appraisals (The Proposed Portfolio)

Stoke-on-Trent

Site Reference	Address	Overall size of site (Hectares)	Total overall score following stage 2 appraisal to establish preferred use(s) (N.B. Some uses score low as they were not subjected to Part B of the Stage 2 Appraisal)				Suggested total Hectareage available for preferred use(s) (N.B. Where a site has scored well for a number of uses during the stage 2 appraisal, a market informed view has been taken in relation to the preferred use. However, the table also accounts for where a site may be appropriate for an alternative use(s). The preferred and alternative use(s) are distinguished using the key below)				Comment on Deliverability (N.B. Where a site is appropriate for other uses in addition to the preferred use, this is noted)
			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key				
							B1a/b (Predominantly Offices)	Preferred Use	Alternative Use	B8 (Logistics)	
Likely Realistic Timescale for Redevelopment - 0-6 years											
*9764	Development Site south of Wades, Festival Park	1.15	122.5	122.5	122.5	38	1.15	1.15	1.15	0	
*2417A & 2552	Development land at Trentham Lakes	20.14	27.5	32.5	121	121	0	0	7.1	7.1	Only proportion of site area likely to be developed for employment uses under current planning permission.
*2417B	Development Plot off Stanley Matthews Way, Trentham Lakes	1.35	30	35	121.5	39	0	0	1.35	0	
*2065	Etruria Valley South, Forge Lane, Festival Park	5.97	122.5	122.5	122.5	122.5	5.97	5.97	5.97	5.97	
*9763	Land at Festival Court, Forge Lane, Festival Park	0.5	119.5	119.5	119.5	41	0.5	0.5	0.5	0	
*New Site 1	Development Site off Campbell Road, Stoke	0.82	104.5	35.35	35.35	35.35	0.82	0	0	0	
*2551C	Land off Gordon Banks Way, Trentham Lakes	5.86	36.5	119	119	119	0	5.86	5.86	5.86	

Site Reference	Address	Overall size of site (Hectares)	Total overall score following stage 2 appraisal to establish preferred use(s) (N.B. Some uses score low as they were not subjected to Part B of the Stage 2 Appraisal)				Suggested total Hectarage available for preferred use(s) (N.B. Where a site has scored well for a number of uses during the stage 2 appraisal, a market informed view has been taken in relation to the preferred use. However, the table also accounts for where a site may be appropriate for an alternative use(s). The preferred and alternative use(s) are distinguished using the key below)				Comment on Deliverability (N.B. Where a site is appropriate for other uses in addition to the preferred use, this is noted)
			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key	Preferred Use	Alternative Use		
							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
*2014B	Land in front of Genesis Park, Chatterley Valley	1.05	115.5	31	31	31	1.05	0	0	0	
*2138	Radial Park, Sideway, Stoke	24.84	28.5	28.5	38.5	118	0	0	0	24.84	
*7324D	Land south of Tunstall Bypass, Sandyford	4.04	97	97	101	101	1.35	1.35	1.35	1.35	Only proportion of site area likely to be developed for employment uses under current planning permission.
*6275A	Land towards south of Media Way, Festival Park	1.68	122.5	122.5	122.5	122.5	1.68	1.68	1.68	1.68	
*2551F	Land off George Eastham Avenue, Trentham Lakes	0.68	36	36	36	112.5	0	0	0	0.69	
*3140B	Ex Phoenix Timber, Foley Road, Longton	1.75	30	35	106.5	111.5	0	0	1.75	1.75	
*2417F & 2417G	Development Land off Eastern Rise, Trentham Lakes	2.86	27.5	32.5	114	42.5	0	0	0.27	0	Only proportion of site area likely to be developed for employment uses under current planning permission.
*9219	Former Cookson Mathey Site, Whittle Road, Meir	8.66	19.5	19.5	19.5	113	0	0	0	8.66	

Site Reference	Address	Overall size of site (Hectares)	Total overall score following stage 2 appraisal to establish preferred use(s) (N.B. Some uses score low as they were not subjected to Part B of the Stage 2 Appraisal)				Suggested total Hectareage available for preferred use(s) (N.B. Where a site has scored well for a number of uses during the stage 2 appraisal, a market informed view has been taken in relation to the preferred use. However, the table also accounts for where a site may be appropriate for an alternative use(s). The preferred and alternative use(s) are distinguished using the key below)				Comment on Deliverability (N.B. Where a site is appropriate for other uses in addition to the preferred use, this is noted)
			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key	Preferred Use	Alternative Use		
							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
*9912	Land off Stanley Matthews Way, Trentham Lakes	0.74	36	36	116.5	116.5	0	0	0.74	0.74	
*2426A & 2326D	Former Diamond Gimson Works, King Street, Fenton	2.58	24.5	29.5	94	94	0	0	0.59	0.59	Remediation works likely to be required on the site as areas of land currently tipped. Only proportion of site area likely to be developed uses under current planning permission.
*9877	Former Shires Bathroom, Normacot	1.57	24	29	29	85	0	0	0	1.57	Site has planning permission for B8 use
*6097	Land at Cannon Street, Hanley	1.57	118	37.5	32.5	27.5	1.2	0	0	0	Only proportion of site area likely to be developed for employment uses under current planning permission. Total ha estimated from outline planning application submitted for the site.
*7324C	Land north of Tunstall Bypass, Sandyford	3.25	97	97	101	101	0	0	1.08	1.08	Only proportion of site area likely to be developed for employment uses under current planning permission.
*9756	Caradon Twyfords Excelsior Works and Garner Street, Cliffe Vale	5.72	29	34	98	98	0	0	5.72	5.72	
*2425A & 2425B	Former Fuchs/ Lear Management site, York Street, Hanley	5.33	83.5	29.5	26.5	26.5	1.78	0	0	0	Site has planning permission for retail and leisure development, which is likely to restrict its potential for employment use. Employment area reduced of site area to account for this.

Site Reference	Address	Overall size of site (Hectares)	Total overall score following stage 2 appraisal to establish preferred use(s) (N.B. Some uses score low as they were not subjected to Part B of the Stage 2 Appraisal)				Suggested total Hectareage available for preferred use(s) (N.B. Where a site has scored well for a number of uses during the stage 2 appraisal, a market informed view has been taken in relation to the preferred use. However, the table also accounts for where a site may be appropriate for an alternative use(s). The preferred and alternative use(s) are distinguished using the key below)				Comment on Deliverability (N.B. Where a site is appropriate for other uses in addition to the preferred use, this is noted)
			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key				
							Preferred Use	Alternative Use			
						B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)		
*2015B	Land off Chatterley Road, Sandyford	3.11	24	24	99	99	0	0	3.11	3.11	
*9631	Land at Etruscan Street, Etruria	1.45	28.5	33.5	98.5	98.5	0	0	1.45	1.45	
*9491	Former Royal Doulton Works & Visitors Centre, Burslem	1.47	96	96	22.5	22.5	1.47	1.47	0	0	
*1625	Land at Coronation Avenue, Longton	1.08	84.5	83.5	24	24	1.08	1.08	0	0	Historically the site has been considered for residential but concerns raised in relation to air pollution.
*9482	Site off Cannon Street, Hanley	0.44	92.5	32.5	27.5	27.5	0.44	0	0	0	
*1821	Stoke Train Station Sidings North, Vernon Road, Stoke	1.07	98.5	33.5	28.5	28.5	1.07	0	0	0	
*9490	Former Spode Works, Eleanor Street Stoke	4.06	95.5	95.5	25.5	25.5	1.28	1.28	0	0	Only proportion of site area likely to be developed for employment uses under current proposals.
3020	East/West Precinct, Old Hall Street, Hanley	6.44	94.5	29.5	24.5	24.5	0.43	0	0	0	Only proportion of site area likely to be developed for employment uses under current planning permission.

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*2380B	Former Sports Field, Copp Lane, Tunstall	6.27	23	28	30	86.5	0	0	0	6.27	Issue currently exists relating to capability of bridge close to the site to accommodate additional traffic generated by development on the site. However, site has planning permission for B8 use.
Committed Developments			Sites currently being development. Sites should be counted as they contribute towards meeting the Core Strategy Target				1.08	0	2.77	4.17	
						Gross Supply of Land (Ha) 0-6 Years (shown as a range)	17.7 - 22.35	3.83 - 20.52	12.89 - 42.44	66.45 - 82.60	
Likely Realistic Timescale for Redevelopment - 6-11 years											
9253	Land off High Street, Sandyford	0.42	23	80	29	27	0	0.42	0	0	
*9954	Former Michelin Tyre Factory	5.32	41.5	30.5	35.5	95.5	0	0	0	5.32	Design features within the factory would make it problematic in terms of converting to B8 use.
9432	Site off Whieldon Road, Stoke	6.85	31.5	38.5	87.5	32.5	0	0	6.85	0	Demolition and potential remediation issues would need to be addressed in order to deliver new development on the site.
*2134	Land at corner of Anchor Road and Park Hall Road, Adderley Green	1.42	95	32.5	28.5	23.5	0.47	0	0	0	Only proportion of site area likely to be developed for employment uses under current planning permission.

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2130	Former Water Works, Uttoxeter Road, Meir	1.65	17.5	17.5	23.5	82.5	0	0	0	1.65	
9576	Land off Station Street, Middleport	29.5	29.5	97	32.5	24.5	0	1.05	0	0	
2413A & 2413B	Land off Dewsbury Road, Fenton Industrial Estate, Fenton	11.74	24	30	97.5	30	0	0	11.74	0	Site affected by poor access. Poor junction out onto Victoria Road.
2131	Development land at Park Hall Business Village, Park Hall	0.59	96	98	21	23.5	0.59	0.59	0	0	
2428B	Minton Hollins Land, Shelton Old Road, Stoke	2.23	86.5	86.5	29.5	29.5	2.23	2.23	0	0	Current access to the site is poor.
*2066	Stoke Train Station Sidings South, Station Road, Stoke	3.63	90.5	32.5	27.5	27.5	3.63	0	0	0	
9677	Former Hewitts Premises, Victoria Road, Fenton	1.98	31.5	82.5	82.5	31.5	0	1.98	1.98	0	
*9196	Former Clarence Primary School, Sampson Street, Hanley	0.43	90	31.5	26.5	26.5	0.13	0	0	0	Only proportion of site area likely to be developed for employment uses.
2421	Etruria Vallley, Forge Lane	20.26	118.5	36	118.5	118.5	20.26	0	20.26	20.26	Main constraint to development is access issue for the site.

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9435	Site off Cobridge Road, Hanley	0.48	30.5	83	25.5	25.5	0	0.48	0	0	Site likely to be in demand for higher value end use than employment.
9283	Land off Scotia Road, Tunstall	1.88	21	28	79	26	0	0	1.88	0	Currently heavily tipped and likely to require remediation in order to ensure it is developable.
9477	Former railway goods, yard and buildings, Station Street, Longport	3	29.5	29.5	85.5	85.5	0	0	3	3	
2182A & 2182B	Land at Mossfield Industrial Estate, Adderley Green	2.07	22	27	82	82	0	0	1.41	1.41	Part of site has planning permission for a household waste recycling centre. Estimated that 1.41 ha available for employment use.
9534	Renew Site (PO9) off Potteries Way, Hanley	1.44	85.5	29.5	24.5	24.5	1.44	0	0	0	Potentially issues over land assembly on the site.
2046A, 2046B & 9479	Sites off Leek New Road, Cobridge	6.84	24.5	75.7	76.5	76.5	0	6.84	6.84	6.84	Land assembly may be an issue due to multiple owners.
9564	Site off Eutruria Road, Hanley	2.02	32.5	80.5	27.5	27.5	0	0.67	0	0	Only proportion of site area likely to be developed for employment uses.
9411	Land at Crowcrofts Road, Newstead	8.28	17.5	80.5	82.5	80.5	0	8.28	8.28	8.28	Not a very prominent site with limited appeal but on established employment site.

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							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
3209A	Land East of Brownhills Road, Tunstall	4.07	22.5	22.5	77.5	77.5	0	0	4.07	4.07	Site has the liability of delivering the Tunstall Southern Access Road once developed out. High value uses likely to be required on the site to finance the Road.
9335	Etruria Works, Etruscan Street, Shelton	2.05	26.5	29.5	84.5	84.5	0	0	2.05	2.05	
9436	Site off Grove Road, Heron Cross	1.44	25.5	30.5	86.5	86.5	0	0	1.44	1.44	
9481	Marsh Street, Hanley	0.85	81.5	29.5	24.5	24.5	0.28	0	0	0	Only proportion of site area likely to be developed for employment.
1815	Site off Cobridge Road, Hanley	2.23	85	86	28	28	2.23	2.23	0	0	Prominent site close to Festival Park with potential for higher value use than employment.
9603	Marsh Street, Hanley	0.99	81.5	29.5	24.5	25.5	0.33	0	0	0	Only proportion of site area likely to be developed for employment uses.
9767	IPS Ceramics, Shelton New Road, Stoke	4.6	29	24	91	91	0	0	4.6	4.6	
9496	Stoke Business Park, Woodhouse Street, Stoke	0.78	31	82	80	27	0	0.26	0.26	0	Site identified in recent Stoke masterplan as a potential hotel and residential site. Air pollution may be an issue. Employment area reduced a third to account for this.

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9775	Carpet Right, Etruria Road, Hanley	0.95	86.5	88.5	26.5	26.5	0.95	0.95	0	0	Highly likely that this site will continue to retain its retail use.	
1790	North Staffs Royal infirmary, Hartshill	8.84	85.5	27	26	26	2.95	0	0	0	Only proportion of site area likely to be developed for employment uses under current proposals for the site.	
2057A & 2057B	Northern section of Etruria Valley	19.34	31	36	100.5	100.5	0	0	19.34	19.34	Accessibility to A500 is an issue as there is currently no access road for the site. Also areas of tipped land on the site.	
2427 & 9554	Land South of Clough Street, Hanley (ONLY 9554 VACANT LAND)	7.76	34	85	85	35	0	7.76	7.76	0	Potential mixed use comprehensive redevelopment area including employment uses. But land assembly would be a major constraint.	
2424	Land North of Clough Street, Hanley	6.05	34	84	84	33	0	6.05	6.05	0	Potential mixed use comprehensive redevelopment area including employment uses. But land assembly would be a major constraint.	
						Gross Supply of Land (Ha) 6-11 Years (shown as a range)						
							9.23 - 35.49	22.69 - 39.79	54.14 - 107.81	46.57 - 78.26		
Likely Realistic Timescale for Redevelopment - 11-16 years												

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9663	Former John Tams Pottery, Sutherland Road, Normacot	2.05	25	24	72	25	0	0	2.05	0	Demolition works would be required on the site along with potential remediation work. Site unlikely to come forward in the short term.
1022	Land between Huntillie Road and Scotia Road, Tunstall	9.25	21	77	77	21	0	9.25	9.25	0	Owner of the site currently has aspirations for a residential scheme on the site. Heavily tipped site.
2419	Land adjacent to Newstead Industrial Estate	4.87	17.5	80.5	82.5	82.5	0	4.87	4.87	4.87	Not a very prominent site with limited appeal but on established employment site.
2099A & 2099B	Former Berry Hill Potteries, Fenton	15.19	26.5	86.5	86.5	26.5	0	15.19	15.19	0	Site affected by poor access. Poor junction out onto Victoria Road. Site also appropriate for B1c use.
9394	Former Portland Works, Sutherland Road, Longton	1.39	24	84	85	26	0	1.39	1.39	0	Numerous poor quality properties in locality. Suitable employment site but limited demand.
2423	Former Brownhills Tileries, Harewood Street, Tunstall	8.69	21	24	78	25	0	0	8.69	0	Site has the liability of delivering the Tunstall Southern Access Road once developed out. High value uses likely to be required on the site to finance the Road.
2119	Land at Whieldon Road, Stoke	5.52	26.5	85.5	38.5	29.5	0	5.52	0	0	
9456	Boundary Works, King Street, Longton	1.06	24.5	75.5	78.5	30.5	0	1.06	1.06	0	Well established employment location, but rundown area with low demand.

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			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key	Preferred Use	Alternative Use			
							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)		
3209B	Land West of Brownhills Road, Tunstall	5.32	22	25	75	25	0	0	5.32	0	Site has the liability of delivering the Tunstall Southern Access Road once developed out. High value uses likely to be required on the site to finance the Road.	
9489	Shelton Enterprise Centre, Shelton	2.12	28.5	76.5	28.5	28.5	0	2.12	0	0	In current market, site is likely to continue to be used as an Enterprise Centre with high occupancy rates.	
2074	Cockshott Sidings, Shelton New Road, Shelton	2.92	29.5	88.5	30.5	29.5	0	2.92	0	0		
4243	Land off Lordship Lane, Fenton	6.87	83	29.5	28.5	28.5	6.87	0	0	0	Main issue relates to access as site does not currently have an access road.	
2108B	Land adjacent to Mossfield Industrial Estate, Adderley Green	7.36	25.5	25.5	75.5	75.5	0	0	7.36	7.36	Access to the site and remediation issues would be main constraints to development.	
						Gross Supply of Land (Ha) 11-16 Years (shown as a range)						
							6.87	6.43 - 42.32	53.79 - 55.18	0 - 12.23		

Newcastle-under-Lyme

Note: The sites that comprise the total land that is considered deliverable (i.e. without significant constraint) in the study area within the short to medium term are identified with an asterisk in the table below.

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Likely Realistic Timescale for Redevelopment - 0-6 years											
*K295	Site off West Avenue. Kidsgrove	5.02	19	84	24	24	0	2.51	0	0	The site has planning permission for a mixed use scheme and only 50% area adjudged to come forward for employment use. Potentially remediation issues due to presence of rubble and crushed brick on the site.
*N1477	Land Adjacent to Centre 500. Wolstanton	1.5	27	90	90	90	0	1.5	1.5	1.5	Well located site but currently has no access point.
*N1479	Silverdale Business Park, Cemetery Road. Silverdale	1.31	22	84	26	21	0	1.31	0	0	
N1487	Pepper Street Garage, Keele	1.06	16	21	83	83	0	0		1.06	
*N1608	Site off Watermills Road. Chesterton	1.45	17	22	86.5	22	0	0	1.45	0	Access to the site from the primary road network likely to be an issue.
*N1628C	Site adjacent to new Sainsburys, Liverpool Road.	0.52	98	32	27	27	0.52	0	0	0	
*N1719	Georgia Pacific site. Outskirts of Newcastle Town Centre	0.56	107.5	33	28	28	0.56	0	0	0	
N1723B	Nelsons Place, Jubille Baths building	0.63	105.5	33	28	28	0.63	0	0	0	Shape of site is likely to restrict its use.
*N1725	St Giles site (Former Primary School). Newcastle Town Centre	0.33	103.5	33	28	28	0.33	0	0	0	
N1732A	Former Blackfriars Bakery, telephone exchange, furniture retailer and ATS unit. Outskirts of Newcastle Town Centre	1.56	102.5	37	28	28	0.47	0	0	0	This is likely to be a mixed use scheme and only 30% of area adjudged to come forward for employment use.

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							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
*N893	Lowlands plot, Chatterley Valley (Phase 1)	6.52	24	34	106	107	0	0	6.52	6.52	
*NEW SITE near Talke	Former warehouse and yard, Congleton Road. Talke	3.48	17	22	82	82	0	0	3.48	3.48	
*R128	Former Children's adventure playbarn (next to Sheet Anchor PH), A53, Baldwins Gate	0.31	64	64	12	12	0.31	0.31	0	0	Site is not located within the urban conurbation of Newcastle-under-Lyme with few surrounding employment uses.
*R68	Keele Science Park Phase 3	28.74	119	26	21	21	28.74	0	0	0	
*R69	Keele Science Park Phase 2	0.5	116	25	20	20	0.5	0	0	0	
Committed development			Sites currently being developed. Site should be counted as it contributes towards meeting Core Strategy target				0.91	0	0	0	
					Gross Supply of Land (Ha) 0-6 Years (shown as a range)						
						32.66 - 32.97	4.13 - 5.63	5.99 - 14.01	8.02 - 12.56		
Likely Realistic Timescale for Redevelopment - 6-11 years											
N1471	Rowhurst Close, off Watermills Road	20.49	19	24	84.5	24	0	0	20.49	0	Access to the site from the primary road network likely to be an issue.
N1474	Ex Chesterton Gasworks. Off London Road	9.29	34.5	94.5	94.5	94.5	0	9.29	9.29	9.29	
N1607	Buildings at Water Street/George Street. Outskirts of Newcastle Town Centre	0.24	90.5	33.5	28.5	28.5	0.24	0	0	0	
*N1724	Newcastle Bus Depot, off A34	0.82	102.5	33	27	27	0.82	0	0	0	
N1726	Land at Brampton Road and Sandy Lane.	1.36	102.5	26	26	26	1.36	0	0	0	Site currently used as public open space, which may restrict its use for employment uses.
N1730	Former Zanzibar Ballroom. Outskirts of Newcastle Town Centre	0.35	91	28.5	28.5	28.5	0.35	0	0	0	

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							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
K309	Land off West Avenue. Kidsgrove	2.06	29	84	24	24	0	2.06	0	0	The site has been marketed the site for for 5 years employment use without success. Remediation works likely to be required as topographical issues present on the site. Residential likely to be only viable use.
					Gross Supply of Land (Ha) 6-11 Years (shown as a range)						
						2.77	2.06 – 11.35	29.78	0 – 9.29		
Likely Realistic Timescale for Redevelopment - 11-16 years											
K275	Kidsgrove Train Station Yard	0.91	16.5	71	20.5	20.5	0	0.91	0	0	Access to the site would be major constraint.
N1468	Chatterley Valley Phase 2. Peacock Hay	44.28	24.5	34.5	85	86	0	0	44.28	44.28	A number of costly constraints (estimated at £10M+) exist to bringing the site forward - topography, access and infrastructure. Site retained though given its strategic location.
N1728	Chesterton Speedway Stadium. Chesterton	4.86	27	30	88	93	0	0	4.86	4.86	Site would be an extension to Lymedale Business Park. However, the site currently is in use for speedway, is likely to have reclamation issues, has no current access to the Business Park and will therefore have viability issues..
					Gross Supply of Land (Ha) 11-16 Years (shown as a range)						
						0	0.91	0 – 49.14	49.14		

9.8 Appendix 7 – Sites discounted after stage 2 appraisal

Site Reference	Address	Overall size of site (Hectares)	Total overall score following stage 2 appraisal to establish preferred use(s) (N.B. Some uses score low as they were not subjected to Part B of the Stage 2 Appraisal)				Suggested total Hectareage available for preferred use(s) (N.B. Where a site has scored well for a number of uses during the stage 2 appraisal, a market informed view has been taken in relation to the preferred use. However, the table also accounts for where a site may be appropriate for an alternative use(s). The preferred and alternative use(s) are distinguished using the key below)				Reason for Discounting Site
			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key				
							B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
Stoke-on-Trent											
6276	Vacant land, Butler Street, Stoke	0.46	88	89	30	27	0.46	0.46	0	0	Site suggested for alternative use in Stoke masterplan
9397	Former Stanley Pottery, Newport Lane, Middleport	1.77	23.5	24.5	74.5	23.5	0	0	1.77	0	Site unlikely to attract interest for employment use.
2093	Land off Peacock View, Fenton	13.76	25	78	78	25	0	13.76	13.76	0	Site unlikely to attract interest for employment use.
Newcastle-under-Lyme											
N1489	Buildings at Lymedale Cross. Knutton	0.39	100.5	100.5	25	25	0.39	0.39	0	0	Site too small for development

Site Reference	Address	Overall size of site (Hectares)	Total overall score following stage 2 appraisal to establish preferred use(s) (N.B. Some uses score low as they were not subjected to Part B of the Stage 2 Appraisal)				Suggested total Hectareage available for preferred use(s) (N.B. Where a site has scored well for a number of uses during the stage 2 appraisal, a market informed view has been taken in relation to the preferred use. However, the table also accounts for where a site may be appropriate for an alternative use(s). The preferred and alternative use(s) are distinguished using the key below)				Reason for Discounting Site
			B1a/b (Predominantly Offices)	B1c (Light Industrial)	B2 (Medium and Heavy Industrial)	B8 (Logistics)	Key				
							Preferred Use	Alternative Use	B2 (Medium and Heavy Industrial)	B8 (Logistics)	
N1616	Land at Lyndale Cross. Knutton	0.9	100.5	100.5	25	25	0.9	0.9	0	0	Shape of site does not lend itself to development of employment uses
R127	Land Between Cemetary Road & Keele Road, Keele	19.93	93	32.5	32.5	32.5	19.93	0	0	0	Site within the Green Belt
N1721	Land South of A500, west of A34	30.21	21	31	90.5	90.5	0	0	30.21	30.21	Site within the Green Belt
N1731	Land Between Talke Road and A500	22.84	25.5	74	82	82	0	0	22.84	22.84	Site within the Green Belt
N1720	Hampton Scrap Yard and land to the west. Keele	5.02	93	31	23	23	0	0	0	0	The realistic use for this site assuming the scrapyard use ceases would be residential. This is based on knowledge of the site owner's aspirations, the likely high site remediation costs and the recent adjacent residential development.
N1722	Public open space off London Road. Chesterton	2.9	30.5	36.5	104	104	0	0	2.9	2.9	Site currently used as public open space and the site is included in the SHLAA.