

Greater Nottingham

Broxtowe Borough Council
Erewash Borough Council
Gedling Borough Council
Nottingham City Council
Rushcliffe Borough Council

Employment Background Paper

June 2012



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Contents

A Purpose of paper and context

- Purpose and description
- National Planning Policy

B Previous evidence base Work

- The Nottingham City Region Employment Land Study (NCRELS) 2007 and NCRELS update 2009
- The October 2010 Aligned Core Strategies Update Paper

C Updating the office jobs forecasts for the purpose of planning policy

- Economic context and forecasts
- NCRELS labour demand and the labour force
- Labour demand in NCRELS
- Labour force capacity 2003-28
- Labour demand and supply comparison 2003-28
- Quantifying potential further changes in the labour force
- Consideration of changes over the Plan Period
- Other factors not quantified
- Conclusions in relation to jobs and labour force comparison

D Distribution of future office jobs between authorities

- Local factors suggesting a distribution of office jobs

E Dealing with office floorspace

- Translating job growth into an updated floorspace estimate.
- Estimated Capacity of authorities for office floorspace
- Relating the office floorspace requirement to capacity and policy factors.
- Qualitative considerations relating to the existing capacity
- Conclusions over Office floorspace provision

F Updating the industry and warehousing land requirements

- Findings of the Nottingham City Region Employment Land Study
- Accounting for the period 2011 to 2028
- Quality of industrial and warehousing Land
- The Demand for Industry and warehousing Land
- The Supply of Industry and warehousing Land
- The 2011 to 2028 Demand accounting for the 'Frictional Margin'.
- Conclusions
- Aligned Core Strategy Policy for Industrial and Warehousing Land
- City / District balance of industry and warehousing

APPENDIX A: Table A1: Possible Distributions of office jobs

APPENDIX B: Industrial Land Allocations and Distribution

APPENDIX C: Tables of Sites and source tables

A. Purpose of Paper and Context

Purpose and description

1. This paper applies to the area covered by the Broxtowe, Gedling and Nottingham City Aligned Core Strategies, the Erewash Borough Core Strategy and the Rushcliffe Core Strategy¹. Accordingly, the term “Core Strategies” in this document can be taken as meaning all the above named Core Strategies. Where the Rushcliffe Core Strategy was also aligned (i.e. up until the ‘Option for consultation’ version of the Aligned Core Strategies) this is explicitly mentioned.
2. The purpose of Policy 4 in the Core Strategies is to support the growth of the area’s economy in providing for jobs and premises to support increased numbers of workers, and to facilitate the shift from manufacturing sectors, where job decline is forecast, towards other sectors, including offices, for which specific provision needs to be made.
3. This Employment Background paper reviews and rolls forward aspects of the Nottingham City Region Employment Land Study (NCRELS) so as to ensure that the evidence base supporting policy 4 (Employment Provision and economic Development) in the Core Strategies is up-to date and fit for purpose². The Paper considers the implications of the proposed revocation of the Regional Strategy and determination of housing need at the local level along with current economic circumstances. It considers the impact of these upon the conclusions of the NCRELS study with consequent conclusions for the evidence base and policy.
4. The paper concludes that, for the purposes of the Policy, the anticipated scale of employment growth based upon external economic factors (e.g. national and international circumstances) in NCRELS is still a valid basis to plan for, bearing in mind the uncertainties associated with forecasting.
5. Apart from the local economy’s sensitivity to external factors there is a link between the local economy and the labour force to support it. The labour force is derived for the most part from the population within the labour market area, and

¹ The Hucknall part of Ashfield District Council is not included and none of Ashfield District is part of the Nottingham Core HMA. However, Hucknall is included in the definition of Greater Nottingham and included in the tables as the NCRELS and subsequent employment work included it.

² A full review of NCRELS was not considered appropriate at this point in the economic cycle given the uncertainties associated with making economic forecasts at the present time. The findings of NCRELS are still considered robust for the reasons set out in this paper.

its future growth, which in turn is supported by the housing to be provided in the Core Strategy. The paper considers the latest information about jobs and labour supply and concludes that, with the population now forecast to emanate from proposed housing provision, and a 'pent-up' demand for work arising from recent reductions in economic activity levels, the housing and economic policies are sufficiently aligned, bearing in mind the uncertainties inherent in the work.

6. The paper differentiates between the office and the industrial/warehousing sectors. The office based employment sector is forecast to grow strongly and requires appropriate provision to be made for new offices and to replace older office floorspace so as to improve the quality of the overall office stock. Whilst industrial/warehousing sector employment is forecast to decline, the paper concludes that land still needs to be allocated so as to allow for the replacement of older obsolete sites and premises with better quality provision. The paper also considers the other employment sectors where employment is also expected to grow significantly, that do not fall within the business use class.
7. A second stage of work for both office and industrial/warehousing provision is to provide for the distribution of land and floorspace across the Greater Nottingham authorities. This was highlighted by the consultants in NCRELS as a further piece of work not encompassed by the original study, but requiring co-operation and joint consideration by the constituent planning authorities. This work is described, as is the way it informs policy 4.

National Planning Policy

8. This paper has been produced within the context provided by the National Planning Policy Framework (NPPF) which was published on the 27th March 2012. The NPPF stresses that the purpose of the planning system is to contribute to sustainable development. The NPPF makes it clear that there are three dimensions to sustainable development: an economic role, a social role and an environmental role and that these should be integrated.
9. Within the context of building a strong competitive economy, the NPPF makes it clear that Government is committed to supporting sustainable economic growth. In terms of drawing up plans local planning authorities should:
 - set out a clear strategy and vision for the area which positively encourages economic growth;
 - set criteria for identifying strategic sites
 - support business sectors taking into account whether they are expanding or contracting and plan for new or emerging sectors and to build in flexibility to meet business needs not anticipated;

- plan positively for the location, promotion and expansion of clusters of knowledge driven, creative or high technology industries;
 - identify priority areas for economic regeneration and infrastructure provision and environmental enhancement.
10. The NPPF maintains the Government's town centre first policy emphasising that local planning authorities should promote the vitality and viability of town centres. Local plans should define the network and hierarchy of centres and allocate a range of sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. In allocating sites the NPPF gives priority to town centre locations followed by edge of centre sites and lastly accessible out of centre locations if required to meet any remaining need provided they are well connected to the town centre.
11. The NPPF includes an additional test of soundness - that is the plan should be positively prepared based on a strategy which seeks to meet objectively assessed development requirements. The other tests remain the same as those previously set out in PPS 12 "Local Spatial Planning" (now rescinded), and include the test most relevant to the evidence base - that plans should be justified and based on evidence that is proportionate to the task. In particular plans and policies should be based on a clear understanding of business needs within and across the economic markets operating in the area. To achieve this, local planning authorities should work together with county and neighbouring authorities to prepare and maintain a robust evidence base which should assess:
- The needs for land or floorspace for economic development both quantitatively and qualitatively for all foreseeable types of economic activity.
 - Review the existing and future supply of land available for economic development and assess its sufficiency and suitability to meet identified needs.
12. The authorities consider the requirements of National Planning Policy have been met for the following reasons. Firstly, the Nottingham City Region provides a good fit with the economic markets operating in the area as it covers the Nottingham travel to work area and therefore the Nottingham labour market.
13. Secondly the NCRELS study, which has been updated, provides an authoritative assessment of future floorspace requirements for the office and industrial and warehousing sectors (B1, 2 and 8 land). The authorities have also robustly re-assessed the adequacy of the existing supply of land in the Nottingham office, industrial and warehousing markets.

14. Thirdly, the authorities have worked in partnership and the policy is positive in its support for economic development based on an objective assessment of the requirements of the various economic sectors. In addition to providing for a range and choice of employment sites, Policy 4 specifically identifies strategic employment sites and positively encourages site allocations for high technology users. The policies in all the Core Strategies promote a network and hierarchy of town centres and direct office development to the city and town centres and other accessible locations within the Sustainable Urban Extensions.
15. Furthermore, by treating the job, land and floorspace forecasts as minimum targets, the Core Strategies build in flexibility for the office market to respond positively to potential growth opportunities and gear up to the increasing pressure for good quality office floorspace from growth sectors in the local economy including high technology knowledge based industry.

A Previous Evidence Base Work

The Nottingham City Region Employment Land Study (NCRELS) 2007 and NCRELS update 2009

16. The Nottingham City Region Employment Land Study (NCRELS) is a key element of the local evidence base supporting the economic development policies of the Core Strategies covering the whole of Greater Nottingham. It was published in 2007, and updated in March 2009 to reflect the housing provision figures in the final Regional Strategy.
17. By way of background, the NCRELS study forecast future employment change and more specifically gives quantitative estimates of jobs for those employment sectors most likely to require (at that time) specific floorspace and land allocations (categories B1, 2 and 8 of the Use Classes Order)³. The study treated office and industrial and warehousing sectors separately, and for offices, the forecast numbers of B1(a & b) jobs were subsequently converted into floorspace requirements using typical worker density ratios as a proxy⁴. Importantly the NCRELS work forecasts the net change in employment or in other words job gains minus job losses to give a net employment change.
18. The NCRELS findings forecast that for the period 2003 – 2016 there would be a further shift towards a more service based local economy with growth in the service sector more or less offsetting losses in traditional employment such as manufacturing. Office employment is expected to grow by around 13,300 jobs⁵ which is approximately half of all employment growth (about 50% of employment growth was forecast in non-B Class sectors such as retail, health and education). In contrast industrial/warehousing employment was forecast to decline by 13,400 jobs.
19. In terms of office floorspace the NCRELS estimated that the 13,300 new office jobs would require about 240,000 square metres (sq.m.) of office type floorspace. NCRELS emphasised that economic investment is highly mobile or “footloose” and it is important that policy provides quality employment sites in accessible

³ NCRELS described this as ‘B-space employment’ - the jobs that occupy industrial space, warehousing and offices, comprising Classes B1 - B8 of the Use Classes Order and certain sui generis uses (3.19). Part ‘B’ of the Use Classes Order includes B1a (office), B1b (research), B1c (light industry), B2 (General Industry) B8 (storage and distribution). The NCRELS consultants estimated that about half of all employment fits broadly into ‘B-space’ employment.

⁴ NCRELS uses the figure of 18 sq. m per office worker and 31 sq. m for warehousing and industrial.

⁵ The actual figure is 13,310

locations. The total estimated capacity (including planned development) would exceed this need but planning policy should ensure office floorspace is provided in sustainable locations to meet the economic aspirations of Greater Nottingham, and to replace the loss of existing poorer quality office space to other uses.

20. For industrial and warehousing jobs the resultant floorspace requirement would be negative (as jobs are forecast to fall) but NCRELS makes it clear that even where industrial employment is in decline new floorspace is required in order to renew older obsolete floorspace or to meet the specific requirements of firms relocating or expanding.
21. Roger Tym were asked to update NCRELS in 2009 in order to provide updated evidence in support of the Aligned Core Strategies Option For Consultation. The NCRELS Update Report increased the figure of 13,310 office jobs by a further 5,325 (to reflect the higher housing requirement of the Regional Plan) to give a total jobs figure of 18,635 between 2003 and 2016 equating to 1,433 jobs per annum. For industrial and warehousing land, it concluded that the increased housing would not affect the findings of the 2007 study

The October 2010 Aligned Core Strategies Update Paper

22. The Councils published a paper in October 2010 in order to explain the derivation of the office employment figures set out in the Greater Nottingham Aligned Core Strategies Option for Consultation Policy 4 (February 2010). Essentially, it rolled forward the findings of NCRELS to cover the period 2009 to 2026. The main findings of the 2010 Update were as follows:
- It projected the NCRELS annual growth rate of office jobs (1,433 jobs per annum) to the end of the then Plan period (2026) to give a figure in the region of 24,400⁶ jobs
 - As forecasting is acknowledged to be an inexact science the Update emphasised that the figure of around 24,400 jobs should be regarded as an indicative minimum for planning purposes in Greater Nottingham 2009 – 2026.
 - The indicative minimum office jobs figure translated into a need for about 439,200 square metres of office floor space in Greater Nottingham, based on a floorspace multiplier of 18 square metres per job.

⁶ The figure is slightly different from the figure of 23,550 set out in paragraph 3.4.3 of the Aligned Core Strategies Option for Consultation February 2010. This was based on a figure 1,385 jobs pa giving a total of 23,545 (23,500 rounded) derived from rounding the NCRELS forecast of 18,635 to 18,000 (18,000/13 = 1385.).

23. Note that this 2012 Employment Background Paper replaces the councils' 2010 Update Paper.

B Updating the NCRELS office jobs forecasts for the purpose of planning policy

24. This section considers the changed National economic context since the earlier NCRELS work and the update paper of 2010. It also considers whether labour supply would support the anticipated job growth underlying the employment provision over the period 2003 to 2028⁷. It seeks to demonstrate that the housing and economic policies are sufficiently aligned, bearing in mind the uncertainties inherent in long-term economic projections.

Economic context and forecasts

25. It is acknowledged that forecasting is not an exact science and is especially difficult in the current economic climate. The Planning Inspectorate's view⁸ is that plans especially core strategies are long term planning strategies and therefore should be prepared for normal economic times and can be reviewed if necessary if exceptional economic conditions prevail.

26. Clearly the wider economic circumstances have changed significantly since the NCRELS work was done in 2007 and 2009. Recent economic conditions have fluctuated in recent years as the economy slowly recovers from the major recession of 2008/9. A recent report⁹ notes that growth in terms of gross domestic product (GDP) was weak in 2011 and that the economy had barely grown over the previous 18 months. For the future, the report acknowledges that there are particular difficulties in forecasting output over the short term but its broad conclusions are that the "bigger picture" is of a gradual recovery in output over the next few years. It also identifies that the greatest risks to recovery are the current difficulties and uncertainties in the Euro area. The state of the wider economy has implications for the local economy, particularly for sectors such as retail because consumer confidence is closely linked to the wider economic conditions and many households are preoccupied with paying back debt.

27. The impact of these wider economic factors on local economic fortunes largely depends upon the economic structure of the local economy as this determines

⁷ It is noted that the Rushcliffe Core Strategy runs from 2011-26. However, for the purposes of this paper the period used for all LPAs' calculations is to extend housing provision pro-rata to 2028. This does not imply that planned housing or employment provision for Rushcliffe should necessarily continue at that level beyond 2026.

⁸ Examining Development Plans Documents: Learning from Experience 2009 The Planning Inspectorate

⁹ Bank of England Quarterly Inflation Report May 2012

how it will react to economic shocks. The impact of the recession can be seen locally in the recent unemployment statistics which show a considerable increase in unemployment within the administrative area of Nottingham City where unemployment amongst the working age population has risen by over 4.2 % points between March 2007 and March 2011, at almost twice the national average¹⁰ to stand at 14.1%. In comparison unemployment data for the wider Nottingham Housing Market Area as a whole indicates that unemployment has increased by 2.8% points from 6.6 % of the working age population in March 2007 to 9.4% in March 2011, which is above the national average of 7.7%. This analysis suggests that much of Greater Nottingham's unemployment is heavily concentrated in Nottingham City (illustrated in absolute terms as the numbers of unemployed in Nottingham City rose from 14,400 in March 2007 to over 19,300 by March 2011). This tends to indicate that the employment structure and weaker skills profile of Nottingham City residents make them more vulnerable to economic shocks.

28. The policy priority is to address joblessness especially within Nottingham City through initiatives aimed at improving skills and to match these new skills to the needs of local employers. Improving access to business finance is also a priority and so too is supporting identified clusters of firms such as those in medical science and health care. The designation of the Enterprise Zone around the Boots site, including the Beeston Business Park, Nottingham Science Park and the Medi Park located near the Queens Medical Centre) in Nottingham City and Broxtowe Borough is also a major policy intervention with the target of creating around 10,000 jobs (source: Nottingham Economic Growth Plan Consultative Draft, February 2012).
29. Whilst, the skills profile of many City residents is an identified weakness, there is evidence to suggest that the wider Greater Nottingham economy as a whole is now more resilient than it was in the past (evidence such as the Nottingham Office review 2010 by the Nottingham Office Forum). This is because it is much less dependent upon traditional manufacturing and generally has a higher skilled and more qualified workforce that is close to the UK average. The economic base is orientated towards the service sector with particular strengths in business and financial services and also in health care.

¹⁰ All of the unemployment data quoted in this report is from the Office for National Statistics' Annual Population Survey (APS). The information relates to the quarterly surveys in the 12 months ending at the date given and is sourced from Nomis (www.nomisweb.co.uk). This has the advantage over the claimant count rate of including all people who are actively looking for a job and would be able to start one, not just those claiming benefits. Because APS data is only available at district level, Hucknall is excluded from the figures.

30. In terms of key sectors for the future of the local economy, the sectors for economic focus identified by the Derbyshire and Nottinghamshire Local Enterprise Partnership are Transport equipment manufacturing, Medical/Bio-science, Food and Drink manufacturing, Construction, the Visitor Economy and Low Carbon and Environmental goods services¹¹, but some of these are not of such importance in Greater Nottingham. Nottingham City Council has recently published an Economic Growth Plan for consultation¹², which is intended to have a significance beyond the Council's boundaries. This identifies the following key sectors for support in the local economy:
- Business Services,
 - Retail Services,
 - Health and Life-sciences,
 - Creative and Digital Industries; and
 - Low carbon and Environmental Goods and Services
31. Given this more resilient economic structure for Greater Nottingham, it is reasonable to assume that the long-term growth prospects for the service sector (including office based employment growth in financial/business services, research and development) remains broadly the same as identified by NCRELS. Similarly the trend for manufacturing employment to decline again identified by NCRELS would hold true. Whilst, the scale and rate of employment growth as set out in NCRELS is likely to have changed it is reasonable to plan for the minimum amount of office based jobs anticipated by NCRELS over the Plan period as the economy resumes long term trends and because of policy objectives to diversify the local economy further.

NCRELS labour demand and the labour force

32. By concluding that the NCRELS work is a reasonable basis for planned growth in the number of jobs for the purposes of the Core Strategies, this indicates that the suggested minimum level of office job provision for Greater Nottingham is that given in the update paper of October 2010, i.e. 24,400. This figure is a starting point to inform a policy that needs to account for market requirements, economic aspirations and the quantity and quality of office floorspace capacity.
33. Therefore an assessment can be made as to whether there is likely to be sufficient capacity in the existing and future population, based upon planned housing provision. While this cannot assume rates of job growth or a direct relationship between jobs and population growth, it is one way of assessing

¹¹ "D2N2 Strategic Priorities & Areas of Economic Focus", Nottingham Business School Economic Strategy Research Bureau, 2011.

¹² "Nottingham Economic Growth Plan, Consultation Draft", Nottingham City Council, February 2012.

whether the housing provision and likely outcome of economic policies are compatible. The following sections consider the labour demand and supply since 2003 and anticipated to 2028 to see whether that compatibility exists.

34. Changes in labour force may be compared to the jobs forecasts arising from the NCRELS work and based upon Plan policies. However, to do this from 2011 does not account for the NCRELS starting date, nor changes covering the NCRELS period to date, where the economy has performed in a very different manner to the longer-term expectations that NCRELS, and the Plan, anticipate. Consequently the period 2003-28 is used to estimate a comparable labour force growth (supply) emanating from the Plan's housing policies.
35. It would also be useful to compare the actual change in jobs between 2003 and 2011 with what was forecast by NCRELS. Unfortunately, consistent data on the number of jobs is not available over that period because of changes in the way that the Office for National Statistics collects the data and the definitions used. It is clear, however, that, due to the recession the anticipated number of jobs has not been provided. This is reflected in the increased number of unemployed people (see paras. 51-53).

Labour Demand in NCRELS

Labour demand in NCRELS (2003-16)

36. The original NCRELS study estimated job demand using economic and employment forecasts produced by Experian for emda. Those Experian/emda forecasts incorporated population growth based on the draft Regional Plan housing provision. Overall almost zero job growth in office and industrial/warehousing sectors was forecast, with equivalent growth and decline of around 13,300 jobs respectively.¹³
37. For the NCRELS update of 2009, which included a higher housing provision assumption the consultants estimated office job growth by stating that:-

“For this update we have assumed that the industrial and warehouses sectors will not decline any further because the City Region has a larger population.

¹³ All three studies mentioned concentrated on 'B-class' employment uses, and derived job growth figures for those sectors alone. Therefore it is difficult to establish an overall scale of estimated job growth, aside from a figure in the 'ELPS' report indicating 3,552 job growth 2003-16 in Nottinghamshire (inc. Nottingham City) (Table 2.1) and the statement above in paragraph 29, indicating that additional job growth, based on (additional) population change would be attributable to Offices and non-B uses.

However the additional population may allow the growing sectors to grow faster. As explained in our previous study the City Region's labour supply was already 'tight' [evidenced by low unemployment rates] and the limited availability of new labour produced a potential constraint to growth. "

38. NCRELS update took a population growth, derived from the increased housing figures, of 26,600 for 2003-16 to derive an additional labour force¹⁴ growth of 10,700. A job growth assumption based on this labour force growth was split 50-50 between office and 'non-B' jobs, and a 1:1 relationship of job-worker was assumed, ignoring full/part time jobs, second jobs and commuting in/out of the HMA. The result was 5,300 office jobs.
39. It was this outcome of the NCRELS update that formed the basis for the 24,400 office jobs growth figure for the Plan period at that time (2009-26) in the 2010 Update paper (see para. 22), which as suggested earlier in this section can be a reasonable basis for the current Core Strategy.
40. Taking this as a starting point an estimate of overall job growth for 2003-16 can be made as follows. NCRELS in 2007 forecast a decline in industry and warehousing of 13,400 jobs with an increase in B1 (office jobs) of 13,300, to which is added an equivalent implied growth in 'non-B' jobs (i.e. 13,300). To this can be added an estimated 10,700¹⁵ office and non-B jobs in the 2009 update with no further decline in industry and warehousing jobs.¹⁶ This produces a 2003-16 NCRELS job growth estimate of 23,900.
41. The figures appearing above and in the rest of this section are set out in tabular form in Table C.1 (page 20), which also shows the calculations involved.

Labour Demand from NCRELS to encompass the period to 2028

42. In extending the NCRELS overall job growth to the end of the Plan period (2028) certain assumptions are made¹⁷. These are firstly that growth in Offices and 'non-B' jobs continues at the rates identified in NCRELS over the whole period 2003 to

¹⁴ The terms Labour Force and Economically Active population are used to mean the same thing in this document, i.e. the population either in work or seeking work. This is derived from population by applying age-related economic activity rates to the working age (16-74) population.

¹⁵ Rounded figures are used throughout this paper and consequently some figures do not appear to sum correctly. In this instance the result of the sum of figures that round to 5,300 rounds to 10,700.

¹⁶ At paragraphs 5.11 - 5.12 in the January 2007 study and paragraph 2.7 of the update in 2008.

¹⁷ The period 2003-28 is used as in this paper to establish conclusions for all the Core Strategies; see paragraph 93 regarding the Rushcliffe Core Strategy.

2028. This is a direct outcome of the acceptance of the NCRELS rates of office growth 2003-16. For 2016-28 this would indicate 17,200 growth in both offices and 'non-B' jobs, i.e. 34,400. For Industrial and Warehousing job losses it would be neither reasonable nor ambitious to assume that these continue at the same rates, although the economic uncertainties mentioned above still apply. Therefore losses at half the rate of loss in NCRELS are assumed to occur, i.e. 6,200 Industrial and Warehousing jobs from 2016-28.

43. Consequently a labour force requirement (or demand) can be tentatively established, of 28,200 (34,400 minus 6,200) total jobs for the period 2016-28. This would indicate a 2003-28 total of 52,100. The above working is also the basis for the 37,400 net growth in all jobs (2011-28) stated in the Aligned Core Strategies, this is based upon the above rates for the appropriate period.

Labour force capacity 2003-28

44. From 2003, with a labour force of around 350,000, growth to 2011 has amounted to about 20,000¹⁸. Looking forward to 2028, housing provision in the HMA is set at a figure of approximately 46,750 dwellings 2011 to 2028¹⁹, Work was commissioned to establish the likely outcome for the population of planning for that level of housing²⁰. These Nottingham Core HMA population forecasts based on planned housing provision have been used to establish that growth in the economically active population would be around 13,500. Taking these two periods together the increase in the labour force between 2003 and 2028 would be around 33,500, other things (such as economic activity) being equal.

Labour demand and supply comparison 2003-28

45. The job growth implied by NCRELS based upon the planned office job growth for 2003-2028 has been set out above as about 52,100. The increase in the labour force 2003-28, based on the Nottingham Core HMA population would be around 33,500. Thus there is, on the face of it, a shortfall of about 18,500 labour supply needing to be made up by changes in other factors. The above workings are set out in tabular form below in Table C.1.

¹⁸ Source: Annual Population Survey, Office for National Statistics. This provides the best available estimate of the economically active population.

¹⁹ The Rushcliffe figures for 2011 to 2026 have been extended to 2028 pro-rata to provide consistency. This is not meant to suggest that this would be an appropriate level of housing provision between 2026 and 2028 for that district.

²⁰ See the Household Projections Background Paper, June 2012.

46. It is important to note that the labour force growth estimated above assumes no changes in economic activity capacity in the future. This ignores two further aspects in addition to the population-based changes described above:

- Changes in economic activity rates due to national policies and trends
- Changes in economic activity rates due to local factors

Changes in economic activity rates due to national policies and trends

47. The main relevant changes in national policies relate to retirement ages. The Office for National Statistics (ONS) have not produced any recent projections looking at the effect of these on economic activity rates, but projections they published in 2006²¹ showed that the rate for women aged 16 to 64 was likely to rise from 70.4% in 2010 to 73.1% in 2020²². These were, however, produced before the Coalition Government's more recent changes in retirement ages, which accelerated the standardisation of the State Pension Age for both men and women at 65 and brought forward to rise to 66 from 2026 to 2020. The default retirement age has also been abolished, meaning that employers will no longer be able to dismiss staff just because they have reached 65.

48. Kent County Council have recently published projections of economic activity rates to 2036²³, which, in the absence of any ONS projections, are of interest because the trends they show are the result of the current national retirement policies. These show an increase in the economic activity rate of women aged 60 to 64 from 33.0% in 2011 to 53.9% in 2028. The rates for men and women aged 65 to 69 rises from 19.0% to 22.2% and 11.1% to 13.7% respectively.

Changes in economic activity rates due to local factors

49. Note should be taken of the fact that, although labour force (economically active population) 2003-11 has amounted to about 20,000, in comparison, labour force growth based on ONS population estimates for that period, using a constant economic activity rate, is about 30,000. One reason why the actual increase in labour force is less than might be expected from the population increase is that the economic activity rate for people of working-age fell from 75% in 2004 to 73%

²¹ "Projections of the UK labour force, 2006 to 2020" in Labour Market Trends January 2006, ONS.

²² These figures are aggregated for all people of working-age, but the projections have separate rates for each age-group. It is believed, though, that the aggregate figures give a good idea of likely trends.

²³ "Technical Paper – Activity Rate projections to 2036", Kent County Council, October 2011.

in 2011. Over the same period, the national rate was virtually unchanged at 76%²⁴.

50. The overall HMA figure masks a fall in Nottingham City from 69% to 63%, whereas elsewhere the rate rose from 79% to 80%. This reflects the fact that much of the decrease is due to the increased number of university students. Going forward, it is reasonable to assume that students generally will become more economically active, albeit mostly in part-time jobs, because of changes to student finances.
51. The implication of these figures is that there is potential supply for job growth inherent in the 2011 population, not only from those having been formerly economically active, but from a proportion of students potentially contributing to the labour force.
52. At the same time, unemployment has been consistently high within Nottingham City compared to the national average and, at 14.1% of the working age population²⁵ is of considerable concern. This high level of unemployment gives a potential source of supply into the labour market which should be taken into account in a quantitative assessment of labour market capacity.
53. Because of these figures, addressing the high levels of unemployment and low economic inactivity, particularly in Nottingham City, is a policy priority of the Core Strategy. The importance of addressing this issue is also a policy priority in the Nottingham Plan (Sustainable Community Strategy), which has a target of increasing the City's employment rate²⁶ from 64% in 2007 to 75% by 2020.
54. If the initiatives being taken by local authorities in the area, Government agencies and others are successful, this will result in a significant increase in economic activity rates and reduced unemployment rates both in absolute terms and relative to the national figures.

Quantifying potential further changes in the labour force

55. Using figures from the population projections, it is possible to say approximately what increase in the overall economic activity rate would be required to produce a given increase in the economically active population based upon the projected

²⁴ Annual Population Survey figures for England.

²⁵ Annual Population Survey (April 2010 to March 2011), ONS. Although the figures are given to one decimal place they are subject to confidence ranges.

²⁶ The employment rate is the percentage of people aged 16 to 64 who are in paid employment.

growth in the working age population. To produce an increase of 18,500 economically active people would require an increase of about 3.6% in the economic activity rate after allowing for the increase in the number of people of working-age.

56. Although their effects cannot be precisely quantified, the paragraphs above suggest that it is reasonable to conclude that factors such as changes in retirement ages and policies to increase the economic activity rate and reduce the unemployment rate will be sufficient to provide this increase. For instance, to give some very approximate figures, changes to the retirement age could increase the overall economic activity rate of people aged 16 to 69 by around 2% by 2028 and reducing the discrepancy between the local overall economic activity rate and the national rate back to its 2004 level would increase the rate by around a further 2%.

Consideration of changes over the Plan Periods

57. The assessment above has used the period 2003-28, for the reasons described in paragraph 34. However, for the Plan period of 2011-28, a 37,400 job growth is implied from the NCRELS-based work. This is provided for as follows:

- About 13,500 labour force from changes in the population (Table C1 – k)
- About 18,500 potential arising from improvements in economic activity in the existing population (paras 54-55)
- About 5,300 labour force arising from the difference between the growth in economically active population between 2003-2011 (20,000) and the demand forecast by NCRELS (14,700) (Table C1 – d & j).

58. It is recognised that actual job change 2003-11 has not been used in the above comparisons, for reasons set out in para 35. However, It is noted that an estimated growth in jobs is likely to have been well below the NCRELS forecasts. This lack of growth would be expected to be made up subject to the economy improving. The Plan accounts for this through having incorporated a shortfall in floorspace provision 2003-11, and recognising that substantial provision may well arise from 'non-space' related job growth which are described later in this paper. In addition, the increased unemployment rates since 2003 noted in para 51 give further credence to the NCRELS work.

Other factors recognised but not quantified

59. It should be borne in mind that the availability of labour is not just a function of the resident population and economic activity rates, but also reflects other factors such as labour mobility, and the labour force skills fitting the requirements of employers. The figures above do not allow for additional workers available

through commuting, which in 2001 rates contributed around 2,000 persons (net) into the HMA. Nor do they assume that in- or out-commuting will change, as this is a labour market effect. However, as the ACS objectives include improving the employment prospects of the HMA working population, if fulfilled they would further increase the chances of local residents filling employment opportunities, potentially reducing out-commuting and increasing the 'available' local labour force.

60. In addition while the NCRELS work included jobs and floorspace in Hucknall the above comparison excludes Hucknall, because the population projections were not available below district level. Comparing the forecast supply of labour excluding Hucknall against a jobs total including Hucknall effectively reduces the balance between labour force and NCRELS labour demand assumptions. The amount is small, as Hucknall's contribution to the area's office provision amounted to only 1,500 jobs, 5% of the total.

Conclusions in relation to jobs and labour force comparison

61. The overall conclusion is that the provision of housing across the HMA is commensurate with planned anticipated labour demand implied by economic policies and assumptions, bearing in mind also the uncertainty of long-term economic projections.

Table C.1					
	Changes in jobs numbers (nominal FTEs)	I&W jobs	B Office jobs	Non-B jobs	Total jobs
a	NCRELS 1 (2003-16)	-13,400	13,300	13,300	13,200
	(Non-B total by implication)				
b	NCRELS 2 (2003-16)	0	5,300	5,300	10,700
c	Conclusions from NCRELS (2003-16)	-13,400	18,600	18,600	23,900
	(Higher figure assumes equal growth in non-B)				
d (=c/13*8)	NCRELS (2) 2003-11 (pro-rata)	-8,200	11,500	11,500	14,700
e (=c/13*5)	NCRELS (2) 2011-16 (pro-rata)	-5,200	7,200	7,200	9,200
f	NCRELS-based annual rate 2016-onwards	-500	1,400	1,400	1,800
	(I&W = c/13/2, office, Non-B = c/13)				
g (= f*12)	Growth implied for 2016-28 (Assumes continued (half-rate) fall in I&W jobs)	-6,200	17,200	17,200	28,200
h (= d+g)	Growth implied 2003-28	-19,600	35,800	35,800	52,100
l (= e+g)	Growth implied in for 2011-28 (appr.)	-11,300	24,400	24,400	37,400

Table C.1 (Cont'd.)		
	Labour force forecasts	Total
j	2003-11 labour force change (Annual Population Survey)	20,000
k	Labour force growth in period 2011-28 (NCC and NCC projections)	13,500
l (=i+j)	Overall labour force growth 2003-28	33,500
m (=h-k)	Balance to be met by changes in economic activity and employment rates 2011-28	18,500

NB Figures are rounded and therefore may not sum correctly

C Distribution of future office jobs between authorities

62. The Update Paper of October 2010 presented an approach agreed between authorities for distributing office floorspace, as advised in the NCRELS report. Table D.1 below updates the 2010 Paper by presenting potential distributions based upon current office jobs (2009), the current share of a HMA total of housing growth, and a reflection of travel to work patterns. These are presented here as percentages whereas the 2010 paper used job numbers.
63. The first column (based on current office job proportions) gives the 2009 proportions of office jobs by district. This is a useful check, but does not take account of housing growth, travel to work or employment potential.
64. The second column (based on future housing growth) is based on the percentage of housing growth by district as currently proposed. However, this assumes that all of these new residents will work within that Borough, which does not reflect cross boundary travel to work patterns.
65. The third column (based on travel to work patterns) is based on housing growth as per the second column, but reduces this figure by the proportion of new residents who are likely to work outside that district (principally in Nottingham City). The 2001 Census proportions of out-commuting from each district are applied to do this. The remaining percentage of jobs from the HMA total are allocated wholly to Nottingham City. It is accepted that a proportion of new residents will work outside Greater Nottingham but this would not change the percentage share significantly.²⁷
66. The final column shows a distribution that takes these factors into account, but also reflects a variety of other factors, namely:
- the opportunity to provide new office jobs at sustainable urban extensions or regeneration sites
 - the role of town centres and the ongoing role of the City Centre etc. and
 - The conclusions of the NCRELS study that Greater Nottingham's labour catchment and demand for land should be seen as a whole, cutting across local authority boundaries.
67. The figures in the fourth column should be regarded as giving an indication of the distribution of office jobs and are not to be taken as precise indications.

²⁷ It is also noted that the data is from 2001 and 2011 Census data will be available shortly.

Table D.1: Approaches to the distribution of future office jobs around Greater Nottingham				
	Based on current share of office jobs ²⁸	Based on share of future housing growth ²⁹	Based on share of future housing growth plus reflecting travel to work ³⁰	Suggested distribution of office jobs
Broxtowe	9%	12%	8%	8%
Erewash	6%	12%	11%	10%
Gedling	8%	15%	9%	7%
Nottingham	61%	34%	55%	55%
Rushcliffe	16%	20%	14%	16%
Hucknall	2%	6%	5%	5%

68. The percentages in the fourth column give a possible distribution of office jobs in the light of local factors set out below. They illustrate a provisional distribution of jobs, prior to a consideration of floorspace, capacity and other matters discussed in the next section.

Local factors suggesting a distribution of office jobs

69. In **Broxtowe**, where potential major sites do not have significant employment provision and whose residents tend to work in Nottingham, Broxtowe's current proportion of Greater Nottingham office employment may fall slightly. A figure as indicated from housing growth and travel to work patterns seems likely.

70. In **Erewash**, although there is potential to increase Erewash's current proportion of jobs, with the Stanton regeneration site and presence of the M1, there are few office jobs existing at present, and uncertainty over the scale and timing of office job growth at Stanton. An office jobs total a little below that indicated from housing growth and travel to work patterns is suggested.

71. In **Gedling** - there are limited major site proposals although the Top Wighay Farm strategic allocation offers an attractive opportunity for office based employment. Hence the scope for departing from the current office jobs figure is

²⁸ NCRELS and 2008 ABI data

²⁹ Aligned Core Strategy, Rushcliffe Local Plan (2009-26 total) & Ashfield RSS planned provision

³⁰ East Midlands RSS and 2001 Census SWS data

limited so the proportion of office jobs proposed maintains the historic reliance that Gedling has on Nottingham City for jobs. This approach will support the major employment base of Nottingham City and reflect current travel to work patterns in the area which are considered sustainable.

72. The primary role of **Nottingham** City tempered by a wider distribution of housing and employment around the HMA, including some employment provision in the Sustainable Urban Extensions and town centres leads to a proportion of new offices jobs similar to that indicated by housing once travel to work patterns (into the City) have been accounted for.
73. Some new office employment in **Rushcliffe**, based largely on provision at Clifton, West Bridgford and Bingham would support a relatively large employment base in Rushcliffe, and the final figure reflects this rather than the level of housing growth and commuting patterns. The proportion of jobs proposed reflects its current share of office jobs within Greater Nottingham.
74. For **Hucknall** a figure as indicated from housing growth and travel to work patterns has been proposed, which shows a substantial increase on the existing proportion of office jobs, reflecting the ambitions for the Rolls Royce prestige employment site.
75. Distributing the 37,400 net growth in all jobs (2011-28) to the individual Council areas is not possible to do with any degree of certainty. However, by using the office jobs distribution set out at table E.3 as a starting point, then assuming the pattern of non-B jobs is in line with existing job distributions, an estimate can be made. This would result in the following illustrative distribution:-
- | | |
|-----------------|---------------|
| Broxtowe | 4,100 |
| Erewash | 4,100 |
| Gedling | 3,700 |
| Nottingham City | 20,100 |
| Rushcliffe | 4,400 |
| Hucknall | 900 |
| Total | 37,400 |

C Dealing with office floorspace

Translating job growth into an updated floorspace estimate.

76. In the Update paper of 2010, using the NCRELS ratio of 18 sq.m. per worker, the indicative 24,400 office jobs figure translated into a need for about 439,200 square metres of office floor space in Greater Nottingham.
77. NCRELS took its employment density figure of 18 sq.m. per office worker from a 1997 Study by Roger Tym and Partners³¹ based largely on London and South East data. More recent research by Drivers Jonas Deloitte contained in the Employment Densities Guide 2nd Edition indicates that 12 sq.m. per office worker is more usual. The 2nd Edition³² notes that there are likely to be regional differences between the north and south and between London and the south east and other regions but considers that there is a lack of regional data to provide benchmark figures. Both editions also note the challenges in determining floorspace measurements that reflect the employment usage, especially for different purposes (i.e. for quantity surveying, construction costs, or market purposes). The increase in density between the two studies reflects both the fact that densities are increasing due to more efficient use of floorspace and also because the 2nd edition uses different bases of floor area measurement including, for offices, the use of the net internal area as opposed to the gross internal area; giving an increase in the resulting ratio.
78. The jobs/floorspace ratio that should be used for Greater Nottingham for the purposes of this paper represents more generic purposes, i.e. to indicate a level of floorspace that might be a requirement. This is likely to be at a lower density than the figure indicated by Drivers Jonas Deloitte, for two reasons, that job densities in the South East are likely to be higher than in Nottingham and the definitions used in the 2nd edition work. However, it also appears to be clear that lower densities as in the earlier work would not be appropriate either; types of office use and practice now prevalent and the economy having affected ratios. Therefore although current actual floorspace ratios for Nottingham are not readily available, a figure of 15 sq.m. per worker has been used to establish a floorspace demand from the number of jobs anticipated. It should be noted that the floorspace ratio of 15 sq.m. per worker is applied to the 2011 – 2028 period, however, up to 2011 estimates of floorspace quoted in this Background Paper rely on the NCRELS forecasts based on 18 sq.m. per worker.

³¹ Roger Tym and Partners for SERPLAN. The use of Business Space: Employment Densities and Working Practices in South East England, 1997.

³²

79. In floorspace terms the amount of office provision for 2011-28 that might be considered appropriate to provide for the 24,400 office jobs, based upon a density of 15 square metres per worker would be 366,000 sq.m..

80. However, between 2006 and 2011³³ some 55,154 sq.m. of office floorspace had been developed within the area (Table E.1). When compared to the provision of around 125,000 sq.m. over a five-year period anticipated in the NCRELS (2009) work (this is based on the NCRELS assumption of 18 sq.m. per worker, as this is past change) there is a shortfall of some 70,000 sq.m. Accounting for the shortfall would suggest a floorspace requirement in the region of 436,000 sq.m. 2011 – 28 (i.e. 366,000 + 70,000).

Table E.1 : Office Floorspace take-up: 2006-2011	
	Net floorspace (1)
Broxtowe	9,900
Erewash	0
Gedling	0
Nottingham	36,121
Rushcliffe	9,133
Hucknall	0
Greater Nottingham	55,154
Source: GN authorities	
(1) developments above 1,000 sq.m. threshold only	

Estimated Capacity of authorities for office floorspace

81. A review of the current capacity of office jobs has been made, taking into account revisions to proposals for new office land and floorspace associated with Sustainable Urban Extensions and existing allocations, updated site capacities and a recalculation of jobs/floorspace ratios where appropriate. This amounts to 464,000 sq.m. on allocations and planning permissions plus a further potential for 155,000 sq.m. on sustainable urban extensions and regeneration sites. These

³³ The RTP NCRELS Update accounted for increase in new office floorspace 2003-6. (Para 2.10)

capacity figures should be taken as provisional, or a 'snapshot' as they continually change owing to new or altered permissions or proposals on allocated sites and SUE plans being developed.

Table E.2: Estimated capacity of office floorspace and estimated capacity for new office jobs by authority (April 2011)

	Office Floorspace Capacity (sq.m.) ³⁴		
	Estimated capacity on allocations and planning permissions	Estimated capacity on SUE and Regeneration sites	Total estimated capacity (floorspace)
Broxtowe	51,700		51,700
Erewash	50,700	30,000	80,700
Gedling	12,800	10,000	22,800
Nottingham City	298,500	74,100	372,600
Rushcliffe	44,800	30,900	74,100
Hucknall	5,400	10,000	15,400
Greater Nottingham	464,000	155,000	617,300

Relating the office floorspace requirement to capacity and policy factors.

82. The paragraphs above establish a basis for a floorspace requirement of 436,000 sq.m. (2011-28) for the HMA as a whole, and a distribution of office floorspace in the context of both the suggested distribution of office jobs, and the capacity for office floorspace

83. Table E.3 below gives an indicative distribution of floorspace if the 436,000 sq.m. were distributed according to the distribution of jobs suggested in table D.1. It shows that there would be a requirement of more floorspace than there is capacity in Gedling and in Hucknall. It also shows a significant under-utilisation of the capacity and potential for regenerating office provision in the City.

³⁴ Office floorspace supply figures provided by local authorities February 2010

84. There is also limited potential for further office provision in and around Hucknall, with the Rolls Royce site forming a major strategic site. Transferring this shortfall in capacity from Gedling and Hucknall to the City would allow for the excess capacity in the City to be utilised, and accord with a policy of concentration and regeneration. This would maintain more than sufficient capacity in the rest of the Plan area. In Erewash and Broxtowe in particular the substantial 'headroom' will give scope to consider re-allocation of suitable employment sites and maintain emphasis on the strategic locations of Stanton and the Boots Enterprise Zone.

Table E.3: Distribution of office floorspace around Greater Nottingham

	Proposed distribution of new office jobs	Indicative floorspace requirement	Total estimated capacity	Provision transferred to City	Final floorspace provision	Headroom'
	a	b	c	d=c-a	e=b+d	f=c-e
Broxtowe	8%	34,000	51,700		34,000	17,700
Erewash	10%	42,900	80,700		42,900	37,800
Gedling	7%	28,600	22,800	-5,800	22,800	0
Nottingham	55%	239,400	372,600	13,600	253,000	119,600
Rushcliffe	16%	67,900	74,100		67,900	6,200
Hucknall	5%	23,200	15,400	-7,800	15,400	0
Greater Nottingham	100%	436,000	617,300	0	436,000	181,300
Total of under-capacity in Hucknall and Gedling			13,600			

NB Figures are rounded and therefore may not sum correctly

Qualitative considerations relating to the existing capacity

85. Noting that the office based employment jobs forecast is considered an indicative minimum, the overall capacity of the supply of office floorspace identified is more than sufficient to meet these forecast needs (see above). A certain level of over-provision is considered to be an appropriate planning response as it addresses the following factors relating to the local economy and local office market:

- Provide space for growth in the non-B class sectors which is expected to be about half of all job growth;
- To provide for a frictional margin and range and choice of quality sites in sustainable locations;

- To provide for a slower than expected delivery of certain complex regeneration sites;
- To allow for a precaution against the lack of 'spaceless job growth'; and
- To allow for the replacement of poor quality office stock

Growth in the non-B class sectors

86. NCRELS forecast that about 50% of all employment growth would be in the non-B class uses such as health, education, retail, leisure, hotels and catering but which also occupy space. This is not surprising given Nottingham's role as a Regional service centre, the presence of two internationally recognised universities and two major hospitals. Some of these sectors especially health and education will employ many people in "back office" type functions that would be appropriate in office locations. Other sectors including hotels and leisure activities may also be permitted in office based locations. Whilst it is difficult to quantify how much potential office type space might be taken up by such non-B class sectors it is likely to be significant. For example the NG2 development currently accommodates non-B uses on 28% of floorspace and Nottingham Business Park about 10%.

Frictional Margin and range and choice of sites

87. In addition to meeting identified office floorspace need, there is a need to ensure that there is sufficient development in the planning and development "pipeline" immediately available for firms to take up. It is worth bearing in mind that firms need space to expand and grow regardless of whether they create employment or not. The Employment Land study recommends the use of such a 'frictional margin' to provide a stock of developable sites/premises to ensure a range and choice of sites are always available. The NCRELS consultants advised that a 'frictional margin' of between 2 and 5 years of gross past take-up (20-50,000 sq.m.) for Offices should be considered³⁵. Even in a depressed market firms are likely to look to replace older floorspace with new floorspace often referred to as "churn" in the market. Unlike anticipated demand which may be planned and released over a whole plan period the frictional margin needs to be available at both the beginning and end of the plan period.

88. A figure of 50,000 sq.m. for the frictional margin is considered prudent representing five years gross past take up and should provide sufficient flexibility for the office market to operate smoothly. This figure of 50,000 sq.m. is not

³⁵ While the consultants advice was to use take-up sufficient information was not available at that time and consequently a margin equivalent to 10% of the Office Stock was used.

additional to the office floorspace requirements but is accounted for within the office floorspace provision figures. The availability of office floorspace will be subject to monitoring to ensure that this frictional margin of 50,000 sq.m. is maintained throughout the Plan periods.

89. Because the provision figures proposed are significantly above the frictional margin, this additional amount of floorspace will only be required towards the end of any plan period if the rate of office development or loss of office floorspace, proceeds faster than that envisaged by the plan. Given the uncertainty acknowledged by the Employment Land study of longer term projections, it is proposed that office development be closely monitored to identify whether an additional 'frictional margin' is required.

Delivery of complex regeneration sites

90. Planned capacity includes potential provision for offices as part of major mixed use schemes in a number of large Regeneration Zones including Eastside, Waterside and Southside close to the City centre. These schemes which are identified as being suitable for a mix of uses are by their nature complex and can take much longer to bring forward. These Regeneration Zones are identified as strategic priorities in the Core Strategies, but their detailed planning, mix of uses, and delivery will be considered in the forthcoming Nottingham City Land and Planning Policies DPD. The scale of new office floorspace and timing of delivery is not assured and the gap between total planned capacity and estimated capacity of office floorspace provision should assist in ensuring an adequate supply of good quality office floorspace is maintained.

Allowance for 'spaceless job growth'

91. Jobs arise in existing premises or on currently used land at different densities, often where one business sector replaces another. This "spaceless growth" is difficult to estimate; lower or higher densities may arise from such re-use and redevelopment. On the other hand, as stated above, firms may need space to expand and grow regardless of whether they create employment or not. Consequently a precautionary approach has been followed which does not reduce the estimate of capacity to take account of such changes .

The replacement of poor quality office stock

92. Evidence from the City 2011 Office market review³⁶ suggests a large shortfall of deliverable, high quality office space within Nottingham City Centre. This analysis suggests that there is a shortage of grade A offices but an oversupply of lower grade existing offices some of which are no longer attractive to investors. Over the Core Strategies periods it is envisaged that some of this poorer quality stock will be replaced by new offices, and whilst providing new office floorspace more attractive to the market, would not be net new additional space.

Conclusions over Office floorspace provision

93. Taking account of paragraphs 84 to 91 above, the fact that the office floorspace provision figures are indicative minima allows for flexibility in supply and for decisions to be made locally about the degree of headroom in floorspace shown in table E3 considered appropriate to each Council area. This flexibility in supply applies across the whole of Greater Nottingham, reflecting the consultants' comment regarding 'footloose' employment. The particular circumstances in Gedling and in Hucknall (Ashfield) justify the lack of such headroom in those districts. The gap between provision and potential supply in Nottingham reflects the uncertainty with regard to other uses that may compete for office space. These include housing and non-B uses, and also manufacturing industry, which currently occupies potential office land and may be retained to a greater than anticipated extent.

94. Note regarding Rushcliffe Core Strategy office provision: Table E3 implies that Rushcliffe Borough Council would need to provide some 59,900 sq.m. of offices for the 15/17ths of the period that the table covers to account for its 2011-26 Core Strategy period. The Submission Draft Core Strategy (Policy 4) provides for a minimum of 57,000 sq.m., based on information prior to the Rushcliffe's decision to allocate a Sustainable Urban extension south of Clifton. It is a matter for the Borough Council to decide whether 57,000 minimum remains an appropriate figure to include in the policy.

³⁶ Nottingham Commercial Office market review 2011, Nottingham Office Forum

D Updating the Industry and warehousing land requirements

Findings of the Nottingham City Region Employment Land Study

95. A key finding of the NCRELS Study was a forecast of further decline in the industrial and warehouse sectors of around 13,400 jobs over the period 2003 to 2016. The Study concluded that once account is taken of the existing and committed future supply of industrial and warehousing sites and premises then the Greater Nottingham area was greatly over supplied.
96. Due to the forecast decline in employment in these sectors, this is not a surprising finding and reflects trends occurring in the local economy over a number of decades. NCRELS assumes that these trends will continue into the future.
97. However, manufacturing remains important to both the national and local economy, especially in those sectors where the UK retains a competitive advantage such as in the manufacture of high value added products. It is also important to the local economy, especially in areas with a long legacy of manufacturing such as Erewash and Hucknall. In spite of overall decline, there are still sectors which will require new development opportunities, both for existing firms to relocate, and for new developments not provided for in the existing stock, for instance large scale distribution/freight facilities, or inward investors.
98. NCRELS therefore recommends that policy should continue to provide for good quality new sites that are immediately available (see below).
99. NCRELS also noted that there would be pressure to redevelop redundant industrial sites for other uses but emphasises the importance of securing an appropriate supply for industrial land for firms to modernise, relocate and expand. Where there are employment sites which continue to meet the needs of modern businesses it remains important to retain these viable sites in employment use, in recognition that much new employment generation will take place in existing sites and premises and to cater for a range and choice of sites. The policy approach should therefore seek to maintain an identified supply of existing and new employment land.
100. Under its preferred scenario, NCRELS estimates that the forecast lower demand for industrial and warehousing floorspace will result in an oversupply in the existing level of floorspace of 104.1 hectares to 2016. The implications of this are that the Councils can plan for a release of 104.1 hectares from industrial and warehousing over this period without impacting on the economy, but any losses

greater than this would need to be made up because there would be insufficient land to meet demand.

101. To allow for a range and choice of sites to be available, NCRELS recommends in practice that a buffer or margin³⁷ of available land is needed. NCRELS used a figure of 10% of the existing stock of industrial and warehousing land, but recommended that a figure equating to 5 years gross industry and warehousing land take up would be appropriate in the context of a number of complex urban regeneration areas and where policy needs to stimulate development by offering a degree of oversupply, as is the case in Greater Nottingham. For Greater Nottingham this 5 year take up figure is 33.5 hectares (equating to the take up 2006 to 2011). Essentially this means that in order for the industrial and warehousing market to operate effectively, there should always be a minimum of 33.5 hectares of available land, to provide a range and choice of suitable and developable sites.

102. Unlike the analysis for office jobs, the NCRELS Update Report (2009), undertaken to assess the impact of the finalised Regional Strategy housing figures on its projections, found the revised housing figures had no direct impact on industrial and warehousing land. It states that:-

"For this update we have assumed that the industrial and warehouses sectors will not decline any further because the City Region has a larger population. However the additional population may allow the growing sectors to grow faster." (paragraph 2.6)

As a result, the starting point for assessing industrial and warehousing land demand for the Core Strategies is the original 2007 NCRELS report.

103. However, an adjustment is made in relation to 136.4 hectares of industrial and warehousing land at Stanton Regeneration Site in Erewash Borough, as this was erroneously included in NCRELS as existing provision. The significant loss of industrial and warehousing land in Erewash included in NCRELS is wholly attributable to the Stanton Ironworks closure and the anticipated loss of much of that land to non-industrial use with a comprehensive redevelopment. However, the loss of most of the Stanton industrial land, much of which was cleared land at the time of NCRELS, and was already being considered for a Sustainable Urban Extension, cannot be considered to give rise to a real need for its redevelopment for the replacement of significant numbers of jobs. Some

³⁷ This allowance is additional to the forecast land requirement.

restructured employment is represented in the land currently assumed for employment as part of the redevelopment.

Accounting for the period 2011 to 2028

104. In contrast to the approach taken to office job growth, extrapolating the findings for industrial and warehousing land over the 2016 to 2028 period (to allow for a Core Strategy Period) may go beyond the recommendations of the consultants. While for office floorspace (again derived from jobs), an annual average increase has been extended to 2028, it is debatable whether this approach should be applied for losses of industrial land. This is because the long term trends for industry and warehousing employment may be less certain than for office jobs. Reduced demand for land may tail off, as the poorer sites would be expected to be lost earlier in the plan period, but not halt, with a strong manufacturing sector remaining, and the economic down-turn ending. In employment terms the plan assumes that the losses of industrial and warehousing jobs will continue at half the rate assumed by NCRELS.

105. Consequently an assumption has been made that the reduction in demand for industry and warehousing land anticipated by NCRELS will continue at half the rate forecast by NCRELS, averaged out over the period 2016 to 2028. This results in an assumed decline in demand for industry and warehousing land of 48.0 hectares for 2016 to 2028. This approach is considered prudent and precautionary, given the consequences of planning for too much loss of employment land, but will have to be kept under regular review.

106. Adding the 48.0 hectares for 2016 to 2028 to the original NCRELS figure of 104.1 hectares results in a decline in demand for (or over supply of) 152.1 hectares of industrial and warehousing land in Greater Nottingham, between 2006 and 2028.

Quality of Industrial and Warehousing Land

107. As well as looking at projected demand for industry and warehousing land, the NCRELS study also assessed existing sites from a market perspective, and recommended that some sites are of poor quality, and no longer meet the needs of businesses. This resulted in a recommendation to consider for release some 285 hectares of existing industrial and warehousing employment land. Taking account of Stanton Regeneration Site (see paragraph 102) brings this figure down to 148.6 hectares.

108. These NCRELS study estimates of the potential loss of industrial and warehousing land have been updated in this report to 2011 (see table F.1) to

show the loss of poorly rated industrial land that authorities currently expect, plan for, or would accept, taking into account known and anticipated plans. (This includes land for which plans exist for other uses, such as some sites within the City Council's Regeneration Zones, where there are existing allocations or where planning permissions have been submitted or approved). This would revise the potential release of existing industrial and warehousing land from 148.6 hectares to a figure of 232.9 hectares. This is a significantly higher figure than the 152.1 hectares which has been calculated as the amount of industry and warehousing land potentially released by the decline in employment.

The Demand for Industry and Warehousing Land

The 2006 to 2028 Demand

109. The overall demand for 2006 to 2028 would be calculated by taking the overall decline in demand (152.1 hectares) away from the anticipated losses of employment land of 232.9 hectares, to give a total of 80.6 hectares. This figure of 80.6 hectares is the amount of industrial and warehousing land required to make up for planned losses of land to other uses, taking into account the lower anticipated future demand for industrial and warehousing land.

The 2011 to 2028

110. The total demand for industrial and warehousing land for 2011 to 2028 would be thus be calculated by accounting for the land developed between 2006 and 2011. Subtracting this 33.5 hectares from the 80.6 hectares gives a 2011 to 2028 demand of 47.3 hectares. This represents the minimum the Councils must plan for in order to make up for planned losses.

The Supply of Industry and Warehousing Land

111. The supply of industrial and warehousing land at 2011, comprising remaining existing allocations and permissions for industrial and warehousing land (including new provisions made through the Core Strategies), totals 220.7 hectares. A list of sites may be found in Appendix C (a separate document) and further details may be obtained from the relevant Council.

The 2011 to 2028 Demand accounting for the 'Frictional Margin'.

112. The total supply of industrial and warehousing land for 2011 to 2028 of 220.7 hectares (existing allocations and permissions for industrial and warehousing land, including new provisions made through the Core Strategies) greatly exceeds anticipated demand. There is therefore no quantitative need for further

allocations (although the quality of sites is an acknowledged issue, so may entail new allocations).

113. So long as the councils ensure a supply of 47.3 hectares is retained as allocations in Greater Nottingham between 2011 and 2026, to replace anticipated losses, there will be sufficient supply of industrial and employment land to meet demand, subject to the available supply never falling below the frictional margin of 33.5 hectares, which should be maintained at all times.

114. The minimum supply of 47.3 hectares does not exceed the NCRELS recommended frictional margin of 33.5 hectares significantly, and just one or two developments early in the plan period could mean supply falls below the recommended margin frictional margin. In order to avoid an early review of the Plan it is considered prudent to include the frictional margin in the minimum provision figures to ensure adequate supply continues to exist to 2028, allowing a range and choice of available sites. This would increase the minimum provision for the area to 80.6 hectares. This still leaves sufficient excess supply of industrial and warehousing land (139.9 ha) to allow councils to review existing allocations in order to reduce the oversupply, although it is considered that allocations which are higher quality in relation to the overall provision of land, should, in the main, be retained.

115. So long as the councils ensure a minimum supply of 80.6 hectares is retained as allocations in Greater Nottingham, between 2011 and 2026, to replace anticipated losses, there will be sufficient supply of industrial and employment land to meet demand, subject to maintaining a frictional margin of 33.5 hectares at all times.

Conclusions

116. There may be a short-term reduction in demand for new industrial and warehousing land, due to the recession. However, for reasons outlined in Section A, continued recession is not something that should be planned for in the long term.

117. Sufficient land is available to meet the anticipated demand for industrial and warehousing land over the period 2011 to 2028, based on the NCRELS study, as updated. There is therefore no need to identify a requirement for more industrial and warehousing land either in the Core Strategies themselves (over and above what is already included), or through subsequent Development Plan Documents. Indeed, councils will be undertaking a review of their existing employment land allocations to reduce oversupply, by de-allocating poor quality sites.

118. However, NCRELS has identified the quality of employment land to be an important issue, As a result all councils should ensure that sufficient good quality sites are identified, in locations attractive to the market. They should also ensure that the decisions relating to the release of existing employment sites to other uses take into account the quality and location of the sites, and the role they serve, for instance in meeting the employment needs of areas experiencing low levels employment.

119. In the light of the current economic downturn and uncertainty over future employment trends, it will be important to monitor and review the supply and demand of industry and warehousing land, and respond to any changes in the market promptly. In particular, it will be important to ensure that there is always a sufficient margin of industrial and warehousing land to allow for market churn and a range and choice of sites.

Table F.1 Balance of Industrial and Warehousing Land Supply and Demand 2011 to 2028

(a) Demand Side

Demand 2006 – 2028	ha
Projected loss of I&W land bought about by a decline in demand – original NCRELS 2006 to 2016	-104.1
Projected loss of I&W land bought about by a decline in demand for 2016 to 2028 - assumed at half annual rate of NCRELS	-48.1
Planned losses of I&W Land (Regen Zones etc)	232.8
Net loss of industrial and warehousing land that needs to be made up 2006 to 2026	80.6
Demand 2011-2028	
Land already developed 2006 – 2011	33.5
Net industrial and warehousing land requirement 2011-2028	47.1

(b) Balance of Supply and Demand

Demand 2011 - 2028	ha
Net I&W land requirement 2011-2028	47.1
Additional allowance for 'frictional margin'	33.5
Overall requirement for industrial and warehousing Land	80.6
Local Plan allocations and planning permissions assumed implemented 2011 to 2026	214.7
Excess of supply over demand for I&W land	134.1

Core Strategy Policy for Industrial and Warehousing Land

120. Due to the level of oversupply of industrial and warehousing land in Greater Nottingham, the 'Option for Consultation' version of the Core Strategies did not include a numerical figure for the amount of land to be provided over the plan period by each council. Consultation responses indicated that it would be considered helpful if the plan included more specific guidance for councils in planning for these land uses.
121. In the context of an existing oversupply of industrial and warehousing land, Policy 4 of the Core Strategies has been redrafted to include broad quantitative guidance on the minimum level of provision each council should retail when undertaking reviews, in order to make up for anticipated losses with the frictional margin (80.6 hectares), and ensure a ready supply of land.
122. Much of the anticipated loss of industrial and warehousing land is in Nottingham City, in part due to the development of the Regeneration Zones, but also because a considerable part of the existing stock of industrial and warehousing land is of poor quality. It is not possible, or necessarily desirable, to replace all of this land within the tight Nottingham City boundaries, and so the policy reflects the availability of industry and warehousing land in the District areas, and seeks to ensure employment land reviews in the districts, as a minimum, maintain sufficient supply to make up for the anticipated losses of 80.6 hectares.
123. Minimum provision figures for each local authority therefore are in proportion to the level of existing supply, to ensure a spread of industrial and warehousing land. It should be emphasised that these are the minimum levels which need to remain after employment land reviews, and it is highly likely that there will be good reasons for these figures to be exceeded, on the basis of local evidence, for instance to ensure a mix of sites including larger sites, and to allow development in locations that are particularly attractive to the market.

Table F.2 Policy 4 industry and warehousing Land 2011 to 2028: Minimum Supply				
Council	Supply at 2011	Percentage of total supply	Provision on basis of distribution of supply	Proposed Policy
			(%* 80.6ha)	
Broxtowe	39.7	18%	14.9	15
Erewash	24.7	12%	9.3	10
Gedling	27.1	13%	10.2	10
Hucknall	37.3	17%	14.0	n/a
Nottingham	31.7	15%	11.9	12
Rushcliffe	54.2	25%	20.3	20
Total	214.7			

124. Policy 4 of the Core Strategies also provides guidance for councils as they undertake employment land reviews, and the need to provide good quality land

City / District balance of industry and warehousing

125. Despite a Greater Nottingham-wide over-supply of industry and warehousing land against gross demand there are substantial differences across individual authorities. The figures for Greater Nottingham as a whole need to be interpreted in the light of the local circumstances relevant to each local authority area.

126. Nottingham City understandably gives rise to the greatest proportion of the NCRELS (negative) net demand, as it is the largest economy and has the greatest amount of industrial land. In contrast, the net demand figures for the districts are relatively small and evenly spread, illustrating their supporting role in the Greater Nottingham economy.

127. When calculating gross demand the spread is similar with most districts anticipating small losses of (usually poor) industrial land mainly to housing. In Nottingham significant losses of industrial land are envisaged.

Nottingham City

128. It is anticipated that there will be a larger loss of existing industry and warehousing than NCRELS predicted, and this has been taken into account in the figures in table F.1 above and at paragraph 105. It is estimated that there could be a substantial loss of industrial and warehousing land to other uses (to offices, non-B employment uses, and residential) largely in the Regeneration Zones. Consequently the City's role for industrial and warehousing employment may reduce as a proportion of Greater Nottingham's role, because these anticipated losses are not fully balanced by new supply of allocated land in the City. It will therefore be important in policy terms that the good quality existing and allocated industrial and warehousing land remains in that use.

129. Capacity identified in the surrounding three districts, which arises mainly from allocations, more than balances the potential losses in the City, so it is not necessary to redistribute further supply to those Districts.

Erewash Borough

130. For Erewash the situation is different, as the significant loss of land identified in NCRELS is wholly attributable to the Stanton Ironworks closure and anticipated loss of much of that land to non-industrial use with a comprehensive redevelopment. As such, the loss of much of the Stanton industrial land (much

of which was cleared land at the time) should not give rise to a real need for its redevelopment to justify the replacement of significant numbers of jobs. Some restructured employment is represented in the land currently assumed for employment as part of the redevelopment. Erewash's net employment needs for industry derived from job expectations in NCRELS are small. This fact has been fully taken into account in determining the Borough's industry and warehousing provision.

131. Opportunities for further development of new industrial and warehouse will mainly be focused at the Stanton Regeneration site. The Borough anticipates regeneration re-using of a sizeable area of now-cleared industrial land to accommodate a more diverse range of uses. It is expected that this will accommodate some relocating, as well as new, manufacturing businesses from elsewhere around the Borough where ageing industrial premises are no longer commercially viable.

Gedling Borough

132. The supply of employment land in Gedling will be critically reviewed as part of its ongoing local plan preparations, and it is anticipated that some existing employment sites are likely to be redeveloped for housing. In relation to allocated employment sites, Top Wighay Farm is considered to be a prime employment location for industrial and warehousing development and is allocated for employment purposes in the Core Strategies.

133. Other employment allocations that have not come forward will be reviewed and considered for possible re-allocation. In the longer term opportunities for more general employment uses will be promoted in the broad location identified at Gedling Colliery/Chase Farm.

Broxtowe Borough

134. The oversupply of industrial and warehousing land in Broxtowe is not of sufficient concern to require de-allocations in the Core Strategy process. In the Housing Market area outside of the City, sites with good access to the M1 are likely to be of most value to potential occupiers particularly distribution business whose main issues when selecting sites is travel time and particularly access to the motorway. The majority of sites in Broxtowe were previously assessed as good with a recommendation to retain. Although this will need to be revisited in terms of greater demand for office jobs and much greater pressure on finding available sites for housing land, this review will be undertaken as part of the Borough's Allocations Development Plan Document.

Rushcliffe

135. The Rushcliffe Core Strategy proposes mixed use developments at Bingham, former RAF Newton, and former Cotgrave Colliery which were previously identified as sites purely for employment development, and South of Clifton, a mixed use development including 20 hectares of employment land. The majority of the 20ha located at Clifton will be available to and will likely to be highly attractive to the industrial and warehousing market. This results in a net reduction of supply of industrial and warehousing land of around 70 hectares from that identified in the NCRELS study; that reduced supply being reflected in the Borough's minimum industry and warehousing land provision figures.

Conclusions

136. The overall over-supply across the area (but under-supply in the City) warrants further consideration of the suitability of sites. This should be undertaken when allocations and development management Development Plan Documents are prepared.

APPENDIX A:

Table A1: Possible approaches to the distribution of future office jobs around Greater Nottingham (2009 – 2026)

	Share of office jobs (2008) [1]	Share of future housing growth[2]	Proportion of residents employed within Nottingham City [3]
Original figures			
Broxtowe	9,700	6,152	34%
Erewash	7,000	6,258	14%
Gedling	8,700	7,250	42%
Nottingham	68,700	17,150	73%
Rushcliffe	17,600	9,845	35%
Hucknall	1,700	2,992	16%
Nottingham Core HMA	111,700	46,655	
Greater Nottingham	113,400	49,647	

	Share of office jobs	Share of future housing growth	Share of future housing growth plus reflecting travel to work[4]
Derived Percentages			
Broxtowe	9%	12%	8%
Erewash	6%	13%	11%
Gedling	8%	15%	9%
Nottingham	61%	34%	55%
Rushcliffe	16%	20%	14%
Hucknall	2%	6%	5%
Greater Nottingham	100%	100%	100%

[1] Source: Annual Business Inquiry 2008. Office jobs defined as SIC Codes J,K,L and O

[2] Aligned Core Strategies (CS), Erewash CS & Rushcliffe CS (2009-26 total) & Ashfield RSS planned provision

[3] Source: 2001 Census travel to work statistics

[4] Calculated from East Midlands Regional Plan and 2001 Census SWS data

Note: Ashfield agreed its proposed housing provision at a Cabinet meeting on 22nd March 2012 to be included in a future Local Plan for its area. For Hucknall this is 2,284 new homes 2010 to 2023. This equates to 176 homes per year, the same as the provision derived from the Regional Plan.

APPENDIX B Industrial Land Allocations and Distribution

Table B1: Calculation of Industrial Land Allocations and Distribution

		Total GN (inc Hucknall)	Broxtowe	Erewash	Gedling	Hucknall	Nottm	Rushcliffe
		ha						
1 Demand 2006 – 2028								
Projected loss of I&W land bought about by a decline in demand – original NCRELS 2006 to 2016		-104.1	-18.1	-13.9	-10.6	-5.1	-55.1	-1.3
Projected loss of I&W land bought about by a decline in demand for 2016 to 2028 - assumed at half annual rate of NCRELS		-48.1	-8.4	-6.4	-4.9	-2.4	-25.4	-0.6
Planned losses of I&W Land (Regen Zones etc)		232.8	9.4	12.4	5.3	6.9	192.2	6.6
Net loss of industrial and warehousing land that needs to be made up 2006 to 2026		80.6	-17.1	-7.9	-10.2	-0.6	111.7	4.7
Demand 2011-2028								
Land already developed 2006 – 2011		33.5	0.9	0	1.9	6.9	23.8	0
Net industrial and warehousing land requirement 2011-2028		47.1	-18.0	-7.9	-12.1	-7.5	87.9	4.7
2 SUPPLY SIDE		ha						
Local Plan allocations and planning permissions assumed implemented 2011 to 2026		162.3	39.7	8.7	27.1	17.3	31.7	37.8
Land identified in SUEs		52.4	0.0	16.0	0.0	20.0	0.0	16.4
Total supply		214.7	39.7	24.7	27.1	37.3	31.7	54.2
Distribution of supply			18%	12%	13%	17%	15%	25%
3 PROVIDING FOR DEMAND FROM SUPPLY		ha						
Net I&W land requirement 2011-2028		47.1	-18.0	-7.9	-12.1	-7.5	87.9	4.7
Additional allowance for 'frictional margin'		33.5						
Overall requirement for industrial and warehousing Land		80.6	14.9	9.3	10.2	14.0	11.9	20.3

APPENDIX C: Tables of Sites

NCRELS 'EXISTING EMPLOYMENT SITES' – UPDATE

NCRELS 'EMPLOYMENT ALLOCATIONS' – UPDATE

GREATER NOTTINGHAM POTENTIAL SUE EMPLOYMENT SITES

GREATER NOTTINGHAM OFFICE FLOORSPACE - 2006 - 2026 - NCRELS UPDATE

These listings include the sites that NCRELS considered plus a few others that have been identified for potential development since NCRELS. They set out the latest status of these sites, where development has taken place since NCRELS, and include the local planning authorities' current assumptions and understanding about future uses and development.

The information is a 'snapshot', intended to describe the current understanding rather than prescribe future outcomes, where decisions in later planning documents and by owners and developers will alter what development takes place.

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: NCRELS EXISTING EMPLOYMENT SITES - UPDATE

Ashfield Sites (Hucknall) - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
EM1 Hf		Bakers Brook Ind Estate - Allocation	3.5	3.5				
		Benneworth Road Ind Est	2.2	2.2				
		Central Garage Site, Papplewick Lane	0.48		0.48			
		Wigwam Lane	0.38	0.38				
		Factories off Bolsover St/Liingfors St/Portland St	3.47		3.47			
		Factory, Occupation Road	0.5		0.5			
		TAG Building, Watnall Road	0.44		0.44			
		FJ Bankin & Son (King Edward St)	0.57		0.57			
		Beardall St/Watnall Road	0.76		0.76			
EM1 Hi		Former Linby Colliery - Allocation	0.9	0.9				
EM1 Hk	Plan D - H13	Daniels Way/Watnall Road - Allocation						Transferred into allocations as not an existing site
			13.2	6.98	6.22	0	0	

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Broxtowe Sites - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
EM1n	478 477	Engine Lane, Moorgreen	2.8	2.8				
EM2	513 343	Eldon Road/Brailsford Way, Attenborough*	10.5	10.5				
EM2	524 362	Chilwell Road/Holly Lane, Beeston*	6.2	6.2				
EM2	536 370	Evelyn Street/Humber Road, Beeston*	2	2				
EM2	544 365	Humber Road South, Beeston (Boots)*	29.8	29.8				
EM2	538 365	Lilac Grove, Beeston*	7.5	7.5				
EM2	539 369	Padge Road, Beeston	4.4	4.4				
EM2	533 368	Regent Street, Beeston*	0.4		0.4			
EM2	533 356	Technology Drive, Beeston Rylands (Siemens)*	14.3	14.3				
EM2	526 373	Wollaton Road, Beeston	0.6		0.6			
EM2	516 353	Bye Pass Road, Chilwell*	2.4		2.4			
EM2	477 427	Coronation Road/Soloman Road, Cossall*	5	5				
EM2	458 469	Bailey Grove Road, Eastwood*	0.9	0.9				
EM2	461 463	Church Street/Farrington Way, Eastwood*	5.1	5.1				
EM2	456 473	Meadowbank Way, Eastwood	7.1	7.1				
EM2	465 457	Newmanleys Road, Eastwood*	4.7	4.7				

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Broxtowe Sites - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non- B space uses	Anticipated losses to Office use	Developed	Comments
EM2	473 453	A610, Giltbrook (former offices)*	1	1				
EM2	479 453	Giltway, Giltbrook (2 sites)*	3.8	1.6	2.2			
EM2	477 479	Engine Lane, Moorgreen (industrial estate)	8.2	7.81	0.39			
EM2	485 462	Baker Road, Newthorpe*	1.3	1.3				
EM2	485 362	Bessell Lane/Palmer Drive, Stapleford*	6	6				
EM2	498 384	Hickings Lane, Stapleford	0.8	0.8				
EM2	490 379	Pasture Road, Stapleford (2 sites)	0.8	0.8				
EM2	491 374	Pinfold Lane/Nottingham Road, Stapleford*	1.3	0.2	1.1			
EM2	484 368	Sandiacre Road, Stapleford*	0.7		0.7			
EM2	506 398	Coventry Lane, Trowell	1.4	1.4				
EM2	487 392	Stapleford Road, Trowell*	3.1	3.1				
EM2	507 453	Main Road/Common Lane, Watnall (2 sites)	6.4	6.4				
	477 427	Coronation Rd/Soloman Rd, Cossall						Listed above
			138.5	130.71	7.79	0	0	

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Erewash Sites - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
E4*	447147 / 338915	Stanton Regeneration Site - Lows Lane - Stanton	164.86	12.5		0		Large scale reduction in the scale of land available for employment purposes. Reduction in number influenced by emerging masterplanning details/information from site owners/agents which makes provision for other land-uses, mainly residential.
E5*	443549 / 340778	West Hallam Storage Depot - Cat and Fiddle Lane	46.10	42.1		4		4 ha anticipated lost to offices
E10	449389 / 332974	Oakleys Mill - Oakleys Road - Long Eaton	1.76		1.26	0.5		See office spreadsheet
E11	448035 / 336188	Station Road (adj. Lidl Superstore) - Sandiacre	5.85	2.7	3.15			Permission granted for retail superstore on significant portion of this land (3.15ha) which lessens available amount of land for B2/B8 development. Changes in preceding columns to reflect this.
E12	446009 / 342386	Land to the West of Mercian Close - Ilkeston	0.40	0.4				
E14	442114 / 334248	Brook View Court & Contractors Yard - Borrowash	0.45		0.45			

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Erewash Sites - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
E16	444490 / 333292	Factory & Works opposite Victoria Mill - Draycott	1.18		1.18			
E17	448104 / 336587	Cross Street / Gas Street - Sandiacre	1.22	1.22				Further work needed to ascertain ground conditions.
EM2	477 427	Coronation Road/Soloman Road, Cossall*	5					This site is in Broxtowe and should not contribute to assessed supply of B2/B8 land in Erewash.
E21	448526 / 334509	Canal Street / Bennett Street Industrial Area - Long Eaton	4.64	2.8	1.84			Large premises forming sizeable part of the wider industrial zone (1.84ha) (Wade Springs) burnt down in 2010. Residential development proposed by agents in early-2011.
E22	447579 / 339901	Industrial Premises to the North of Hallam Fields Road - Ilkeston	7.49	7.49				
E23	449660 / 333805	Stadium Industrial Estate - Long Eaton	1.12	1.12				
New Site	447932 / 339481	Land at Hallam Fields Road, Ilkeston	0.44	0.44				New site consisting of two large business units for B2/B8 - granted permission in 2008 and development completed in 2010.
New Site	449681 / 332865	Land at Manor House Road, Long Eaton	0.77	0.77				New site with six units. 0.19ha of land remaining which has permission for two B2/B8 units (ERE/0807/0081), but this is lower than 0.4ha threshold so won't be reported through the 'allocations' tab.
ADDITIONAL TO NCRELS E 20	446815/342 742	Bellfield Street Ind Estate, Ilkeston	5.80	3.7		2		Permission for redevelopment of broadly half of the site (2.7ha) granted permission through ERE/1008/0052 - This would be for eight light industrial units (B1c), three general business units (B2) and three-storey office block. Not yet implemented.
			247.08	70.33	7.88	4.50	0.00	

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Gedling Sites - Existing Areas

Site Information

Ref_No	Sub-Ref (Grid Ref)	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non- B space uses	Anticipated losses to Office use	Developed	Comments
E1(b)	463238 / 340803	Victoria Park, Netherfield	3.5	3.5				
E1(d)	451846 / 353214	North of Hazelford Way	2	2				
E1(e)	460103 / 350260	Former Calverton Colliery	9	9				
E3	462788 / 341080	Victoria Business Park	26	26				
E3	461456 / 350057	Hillcrest Park, Calverton	3	3				
E3	461808 / 340852	Colwick Industrial Estate	98	98				
E3	454870 / 347432	Park Road, Bestwood Village	7	7				
E3	457962 / 345007	Portland Street, Daybrook	4	4				
E3	459433 / 345576	Brookfield Road / Rolleston Drive, Arnold	8	3.7	4.3			
E3	457922 / 344936	Mansfield Road, Arnold	1		1			
E3	457734 / 345391	Salop Street, Arnold	5	5				
E3	459210 / 345825	Catton Road	1	1				
E3	457598 / 344896	Sherbrook Road, Daybrook	1.5	1.5				
E3	461717 / 341502	Station Road, Carlton	0.2	0.2				
E3	456481 / 346277	Bewcastle Road, Bestwood Park	0.4	0.4				
E3	451835 / 353092	South of Hazelford Way, Newstead	3	3				
E3	457962 / 345007	Former Home Brewery, Daybrook	4	4				
2009/0239	462661 / 341000	Great Northern Way (10)	0.22	0.22				Non-NCRELS site. Construction of six class B1(c) business units. Completed during 2009/10
			176.82	171.52	5.3	0	0	

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Rushcliffe Sites - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
	RTP01	Bunny Trading Estate	2.42	2.42				
	RTP02	Chapel Lane	9.80	9.8				
	RTP03	Candleby Court	0.29	0.29				
	RTP04	Colliery Site	1.10	1.1				
	RTP05	Manvers Business Park	3.20	3.2				
	RTP06	Cropwell Mill	1.60	1.6				
	RTP07	British Gypsum	25.20	25.2				
	RTP08	British Gypsum	4.50	4.5				
	RTP09	British Geological Survey	6.70	6.7				
	RTP10	Keyworth Workshops	0.80	0.8				
	RTP11	Coach Gap Lane	3.70	3.7				
	RTP12	Airfield	3.40	3.4				
	RTP13	Powertech centre	2.00	2.00				
	RTP14	Power station admin centre (Eon offices)	1.60	1.60				
	RTP15	Artex blue Hawk	3.60		3.6			
	RTP16	Brookside Road	1.20		1.2			
	RTP17	Hathern Station	0.20	0.2				
	RTP18	Nottingham University School of Agriculture	20.20	20.2				

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Rushcliffe Sites - Existing Areas

Site Information

Ref_No	Sub-Ref	Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
	RTP19	Nottingham Airport	9.10	9.1				
	RTP20	Landmere Lane (existing)	2.10	2.10				
	RTP21	Wilford and Nottingham South Industrial Estate	7.80	7.8				
	RTP22	Ludlow Hill Industrial Estate	1.80		1.8			
		Ruddington Fields Business Park	19.90	19.9				
	RTP29	Power Station (remainder)	83.41	83.41				
			215.62	209.02	6.60	0.00	0.00	

Nottingham City - Existing Employment Areas

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
E3		Riverside (former Wilford Power Station)/Lenton Lane	300.00	300.00				
E3		Glaisdale	43.00	43.00				
E3		Blenheim	40.00	40.00				
E3		Phoenix Park (former Babbington Colliery)	10.00	10.00				
0		Lockwood off Bewcastle Rd	1.26	1.26				
1		Hempshill Ln/Crabtree Rd	0.90	0.90				
2		Moorbridge/Bestwood rd	4.46	4.50				
3		Greasley St etc	10.25	6.85	3.40			
4		Hucknall Rd/Cowlairs/Rigley Dr	1.63	1.63				
5		Newcastle St	3.00	3.00				

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Nottingham City - Existing Employment Areas

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
6		Occupation Rd of Cinderhill Rd	1.22	1.22				
7		Charles Way etc	5.90	5.90				
8		Piccadilly/Kemmel Rd/Connelly Ct	0.88	0.88				
9		Nottingham Science & Technology Park Phase 1	6.02	6.02				
10		Robin Hood Way/ Riverside Way	0.84					
11		East of Racecourse Road	3.17	3.17				
12		Abbey Br/Hoyland Ave	1.70					Later survey identified as non employment use
13		Leen Gate	3.50			3.50		
14		Willoughby St/Prospect Ct	0.77	0.27	0.50			
15		Lenton Blvd/Ashburnham Ave	1.79	1.79				
16		Lenton Blvd/Hichin Brook	1.64	1.60				
17		Salisbury St/Faraday Rd	1.90	1.90				
18		Vernon Rd/ Park Lane	5.60	5.60				
19		North of Kelstern CI off Nuthall Rd	0.75					Later survey identified as non employment use
20		Bagnall Rd/ Mill St	1.55	1.55				
21		David Lane	0.64	0.64				
22		Vernon Rd/ Bulwell Lane	1.11	1.11				
23		Vernon Rd/ Southwark	1.08	0.40	0.70			
24		Beaver & Tapley (appeal decision) etc	7.30	4.90	2.40			
26		Bar Lane/Church St etc	10.66	6.36	4.30			

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Nottingham City - Existing Employment Areas

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non- B space uses	Anticipated losses to Office use	Developed	Comments
27		Vernon Rd/ Nottingham Rd / Valley Rd	0.75					Later survey identified as non employment use
28		Woodborough Rd/Woodthorpe Rd	0.48					Later survey identified as non employment use
29		Newcastle T off Nuthall Rd	0.54					Later survey identified as non employment use
30		Western Blvd / Radford Rd	1.30	1.30				
31		Radford Rd/Silverdale Rd	0.94					
32		Perry Rd/Westbury Rd/Lortas Rd/Malton Rd	4.68	4.68				
33		Radford Rd/North Gate	11.49	11.49				
34		Mount St/Duke St	12.00	12.00				
35		Haydn Rd/Quorn Rd/Glamis Rd	2.40	2.40				
36		Ellesmere Business Park off Haydn Rd & Trent Water	5.30	5.30				
37		Wesley St off Mansfield Rd	0.49		0.49			
38		South of Former Co-op Dairy, Beechdale Road	1.94		1.94			
39		Chalfont Dr	13.73		13.73			
40		Whitemoor Ct Ind Est	2.58	2.58				
41		Ascot Rd	2.53		2.53			
42		Bobbers Mill/Alfreton Rd	4.20	4.20				
43		Holland St	0.42	0.12	0.30			
44		Siemens/Training Centre off Woodyard Ln	1.78		1.80			
45		Radford Bridge Rd, off Wollaton Rd	0.45	0.45				

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Nottingham City - Existing Employment Areas

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
46		Canterbury Rd, off Wollaton Rd	1.92	1.32	0.60			
47		Midland Ct/New Rd	0.83	0.83				
48		Deakins/St Peters St	2.06	2.06				
49		Hartley Rd/St Peters St	0.83	0.83				
50		Radford Blvd/Prospect St	5.60	1.90	3.70			
51		Radford Blvd/Alfreton Rd	2.20	2.20				
52		Denman/Grant	0.73	0.23	0.50			
53		Bloomsgrove Ind Est, off Ilkeston Rd	4.56	3.06	1.50			
54		Sherwood Business Centre	3.49	3.50				
55		Alfred St/Kilburn St	0.92	0.32	0.60			
56		Carlton Rd/Stonebridge Rd	5.28	5.28				
57		Thornfield IE off Carlton Rd	2.58	2.58				
58		Cussons etc	5.20		5.20			
59		Gauntley St	0.47					
60		Jubilee Campus	34.50		34.50			
61		Hucknall Rd/Hucknall Lane	0.75	0.75				
62		Calverton Drive	0.52	0.52				
63		Perry Road	0.52	0.22	0.30			
64		Sherwood Rise	1.89	1.89				
65		Beechdale Road	0.36					Later survey identified as non employment use

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Nottingham City - Existing Employment Areas

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
66		Gregory Blvd	0.62	0.62				
67		Leen Gate	1.08	1.08				
68		Fairham House	2.14		2.14			
69		Lanthwaite Road	0.71		0.71			
Additional from allocations Nottm 25		Vernn Rd/Vernon Ave	3.70		3.70			
			624.0	528.2	81.8	3.5	0.0	

Nottingham City - MU Sites

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
MU3.1		Sovereign House	1.10			1.12		
MU3.3		Sheriffs Way/Arkwright Street	1.20			1.2		
MU3.4		130 - 158 Canal Street	0.47			0.47		
MU3.5		Midland Railway Station Car Park	6.03			6.03		
MU3.6		Station Street	0.43					
MU3.7		Waterway Street	0.54			0.54		
MU3.9		Arkwright Street East	1.17			1.17		
MU5.1		Victoria Leisure Centre	0.46		0.46			
MU5.2		Bus Depots	2.53		2.53			
MU5.3		Sneinton Market	1.32			1.32		
MU5.4		Huntingdon Street / Brook Street	0.41		0.41			

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

Nottingham City - MU Sites

Site Information

Ref_No		Name	Size - ha	Retain Industrial Land use	Anticipated losses to non-B space uses	Anticipated losses to Office use	Developed	Comments
MU5.6		Pennyfoot Street	1.10	1.1				
MU7.1		Eastcroft Depot	5.48	2.48	3			
MU7.2		Trent Lane Basin	11.96		11.96			
MU7.3		Meadow Lane Site	8.74	3.74	5			
MU7.4		Iremonger Road	0.94		0.94			
MU7.5		Freeth St	8.56		7.36	1.2		
MU8.2		Beechdale Road (Former Co-op Dairy)	2.59				2.6	
MU8.3		Lortas Road (Former Westbury School)	1.40		1.4			
MU8.4		Western Boulevard	1.57	1.57				
MU8.5		Forest Mill	0.94					
MU8.6		Dunn Line Coaches, Park Lane, Old Basford	1.70	1.7				
MU9		Stanton Tip	43.88		35		8.88	
			104.5	10.6	68.1	13.1	11.5	

Nottingham City Regeneration Zones from NCRELS

Site Information

Ref_No		Name	Size - ha
MU2		Southside Regeneration Zone	40.0
MU4:		Eastside Regeneration Zone	56.0
MU6:		Waterside Regeneration Zone	100.0
			196.0

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: NCRELS EMPLOYMENT ALLOCATIONS - UPDATE

Ashfield

[illegible]

GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: NCRELS EMPLOYMENT ALLOCATIONS - UPDATE

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

BROXTOWE

[illegible]

GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: NCRELS EMPLOYMENT ALLOCATIONS - UPDATE

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

EREWASH

Ref_No	Sub-Ref	Name	Size - ha	Balance as at 1st April 2011	Industrial Land Allocation	Anticipated losses: industry to non B space uses	Anticipated losses: industry to Office Use	Losses to non-employment uses	Losses to other uses	Comments
E1*	449822 / 332741	Railway Land at Meadow Lane - Long Eaton	3.70	3.70	3.70					AR (Aug 2011) - This is still available and allocated for general employment uses (B1, B2 and B8) although its immediate surroundings make the site suitable for heavier forms of industry and/or warehousing.
E6	449346 / 334037	Former Gas Depot and Adjacent Land - Nottingham Road	2.90	2.9		1.9	1			AR (Aug 2011) - This is still most reliable information concerning the site. Still expect the site to accommodate a mix of housing and offices given its edge-of-centre location.
E7	449063 / 334278	Railway Land at Worrall Avenue - Long Eaton	1.04	1.04		1.04				AR (Aug 2011) - Site still forms part of 10-15yr tranche in most up-to-date SHLAA, therefore unlikely to contribute to industrial land supply.
E8	449317 / 334260	Railway Land at Mayfield Grove - Long Eaton	5.32	5.32		5.32				AR (Aug 2011) - SHLAA assessment carried forward to most recent update. Like site above, unlikely to yield B2/B8 land.
E9	447786 / 339706	Land to the North of Hallam Field Roads - Ilkeston	0.92	0.92	0.92					AR (Aug 2011) - Site still seemingly available and therefore should stay as part of general supply.
E13	445510 / 342273	Land off Manners Avenue - Ilkeston	0.6	0.60	0.60					AR (Aug 2011) - Site still available for B2/B8 purposes, original study inflated site size so have revised downwards to 0.6ha mainly owing to the existing of a electricity sub-station

GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: NCRELS EMPLOYMENT ALLOCATIONS - UPDATE

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

EREWASH[illegible]

GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: NCRELS EMPLOYMENT ALLOCATIONS - UPDATE

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

GEDLING

[illegible]

Greater Nottingham Core Strategies: Employment Background Paper: June 2012

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GREATER NOTTINGHAM ALIGNED CORE STRATEGIES: POTENTIAL SUE EMPLOYMENT SITES

	Sub-Ref	Name	Size - ha	Offices	Industrial Land	Comments
			ha	Employ No	Employ No	
Ashfield	SUE - A4	Rolls Royce Watnall Road - Allocation	20		20	Incorporates loss of 13 ha of existing industrial allocation and re-allocation of 19.99 ha.
	SUE - A6	Whyburn Farm				Now removed
				0	0	20
Browtowe	SUE - G2	Between Stapleford & Toton				Site not now included
	SUE - G3	Toton Sidings, Toton				Site not now included
	SUE - H2	North of Stapleford				Site not now included
				0	0	0
Erewash	SUE - J1	West of Ilkeston	0		0	Site not now included - was 8ha (2ha nominally office land) of additional B2/B8 land - extension to the Manners Industrial Estate. (NB previously duplicated as an allocation in error)
	SUE - J3	Stanton Regeneration Site, Lows Lane Stanton		10	16	Regeneration of site makes provision for 38.5ha of employment land. 10ha of new B1 land, 16ha of new B2/B8 land and 12.5ha of retained employment land (which is almost exclusively all B2/B8 uses). This has been incorporated in the Industrial/Warehousing s
				10	0	16
Gedling	SUE - A1	Top Wighay Farm				No submitted planning application
	SUE - A2	Around Linby				No submitted planning application
	SUE -B1	North of Redhill (Part)				No submitted planning application
				0	0	0
Rushcliffe	SUE - E2	Edwalton				
	SUE - F1	Clifton	20	3.6	16.4	RBC Assumption is 12,000 sqm of B1a.at 1/3rd site area
	SUE - E1	Gamston				Included against SUE recoimendations as currently subject to planning application.
				3.6	0	16.4

GREATER NOTTINGHAM OFFICE FLOORSPEACE - 2006 - 2026 - NCRELS UPDATE

ASHFIELD

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	Ash -H2	Annesley Road/A611 Allocation		3,040		3,040	
	Ash -H9	North A611/Watnall Road - Allocation		2,400		2,400	

BROXTOWE

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	Brox 461 466	South Street, Eastwood (west)			9,900		
		2 Vickery Way, Chilwell		1,332		1,332	
	EM1d	Land off Bowden Drive, Along side railway, Beeston		6,333		6,333	
	EM1f	Former Bartons bus depot, Queens Road, Chilwell		2,444		2,444	Considered for housing in the SHLAA
	EM1g	Part of former ski facility, Solomon Road, Cossall		2,000		2,000	
	EM1h	Land West of Eastwood Hall, East of the A610		11,533		11,533	
	EM1i	Rear of South Street (east), Eastwood		1,556		1,556	
	EM1k	Land off Newmanleys Road, Eastwood		2,222		2,222	
	EM1o	Former Dye works, West End Street, Stapleford		1,667		1,667	
	EM1p	The coal stocking yard, Main Road, Watnall		8,000		8,000	
	EM1q	Land to East of Bakery, Main Road, Watnall		1,444		1,444	
	Brox 533 361	Technology Drive, Beeston Rylands		13,200		13,200	

GREATER NOTTINGHAM OFFICE FLOORSPACE - 2006 - 2026 - NCRELS UPDATE

EREWASH

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	Ere E6	Former Gas Depot and Adjacent Land - Nottingham Road		12,500		12,500	This 2.9 hectare site is in a good location very close to the defined shopping centre of Long Eaton. It is anticipated that this site will be developed for a mix of uses including 1 hectare of offices.
	Ere E15	Oakwell Brickworks - Ilkeston		9,900		9,900	Disagree with NCRELS. This site would offer opportunities for a mixed use development including 3 hectares of offices. SHLAA 2012 considers that the entirety of this site will come forward for residential development.
	Ere E10	Oakleys Mill, Oakleys Road - Long Eaton		6,250		6,250	Disagree with NCRELS. Offers the possibility to utilise existing buildings on the site to provide office space. Offices 0.5 hectares. SHLAA 2012 considers that the entirety of this site will come forward for residential development.
	Ere E5*	West Hallam Storage Depot - Cat and Fiddle Lane		13,200		13,200	Disagree with NCRELS. Re-configure existing warehousing/Nissan Huts on the east of the site to provide office space. Offices 4 hectares.
	Ere E20	Bellfield Street, Industrial Estate, Ilkeston		6,600		6,600	Disagree with NCRELS. Utilising vacant land to the south east of site for offices. Offices 2 hectares
	Plan app Ref No. 1208/0045	Site off J25 of M1. 56, Bostocks Lane, Sandiacre		2,295		2,295	Granted Full Planning Permission 30/03/2009 for the erection of an office building.

GEDLING

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	E1(c)	Former Gedling Colliery					Available
	E1(f)	Teal Close	-	12,750	-	12,750	Available

GREATER NOTTINGHAM OFFICE FLOORSPEACE - 2006 - 2026 - NCRELS UPDATE

NOTTINGHAM

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	MU1.3	Peoples College Maid Marian Way	-	16,513	-	16,513	Mixed use site education and office dev - info from Planning app
		Cranbrook House					lost to residential prior to 2006
	E 2.5	Manvers St	-	-	-	-	Inc in Island Site
	E2.10	Island Site	-	130,000	- 836	130,000	Figs from planning app. Includes sites E2.7 and E2.11
	E2.7	East of Grt Northern Close	-	-	-	-	Inc in Island Site
	MU5.1	Vic Leisure Centre	-	1,000	-	1,000	
	MU5.1	Bus Depot	-				Depot/garage/workshop site likley to be lost longer term. Redeve could include office space - large site could be larger office element if market demands.
	MU5.3	Sneinton Mkt	-				No loss as existing use retail. Redeve likley to include new commercial space - Source NRL
	MU5.4	Huntingdon Street	-				Site with potential for offices, assumed zero as at 21 dec 09
	MU5.5	Beck St Cowan Street	-				Site with potential for offices, assumed zero as at 21 dec 09
	Not allocated	Remainder of Eastside	-				Likely to be some gradual change (loss) in remaining Warehouses and Depots (Great Freeman Street, Howard Street, Lennox Street but limited impact. Scope for further office development on small sites. Est 10,000 office gain min possible.
	MU9	Stanton Tip	-	20,000	-	20,000	Feasibility and Delivery Plan for redevelopment of the tip for mixed uses - long term project. The site can accommodate employment land and 500 dwellings.
	E1.1	Nottingham Science & Technology Park	-	4,200	9,153	4,200	31/3/7 dev of App:06/00910 for 5.3 hectares - erection of 4 buildings of 20,273sqm B1. App :06/00924 erection of 4,800sqm B1 on 2ha in north-east. App :06/01294 and 06/02053 to erect 9,153sqm for B1 and D1 on 1.3ha in south west part.
	E1.3	ng2 - Former ROF site	-	10,600	26,186	10,600	Total for the original 18 hectare site was for upto 66,000sqm. Miller Birch 08/00195/PRES4
	E2.4	Riverside (fmr Wilford Power Station)	-	6,600	-	6,600	
	E3	Riverside (former Wilford Power Station)/Lenton Lane	-	-	-	-	Initially included as 200 hectares mainly industrial land.
	Nottm 10	Robin Hood Way/ Riverside Way	-	2,762	-	2,762	
	Nottm 68	Fairham House	7,062	-	-	- 7,062	consideration for residential or retail end-use
	MU2	Boots H Block now Jurys Inn	-	6,800	- 3,200	6,800	
	MU2	White land north of Water Way Street West					Likely office quarter development less dense than Sov House and Wilson Bowden but larger area -

GREATER NOTTINGHAM OFFICE FLOORSPEACE - 2006 - 2026 - NCRELS UPDATE

NOTTINGHAM

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	MU2	White land east of Arkwright Street					Much in good employment use, most obvious sites have been lost to resi already but could be further small changes, loss of ind likely to be outweighed by creation of B1.
	MU3.1	Sovereign House	6,000	27,000	-	21,000	App for mixed use in offices
	MU3.10	Arkwright Street East	-				Mostly retail. Small ind units to be lost to NET. But poss of new office/ind as part of comp redev. Includes loss of ind land at Picture Works.
	MU3.3	Meadows Gateway	-	6,962	-	6,962	Figs from Meadows Gateway Planning Application
	MU3.4	Canal Street south (South Reef)	-				Vacant car park for years so no net loss in2006-2009
	MU3.5	The Hub	-				Based on DTZ appraisal of solely commercial scheme. Some ind lost due to demol of warehouses on Thames Water Land
	MU3.6	Former DHSS Office/canalside (Bildurn)	-	3,700	-	3,700	Scheme under consideration for offices (not inc DHSS)
	MU3.7	Wilford Street	-	12,313	-	12,313	pp for office dev
	E1.2	Nottingham BP (Chilwell Dam Farm)	-	40,000	-	40,000	Total for the original 25 hectare site was for upto 79,091sqm B1.
	Nottm 15	Lenton Blvd/Ashburnham Ave	6,000	-	-	6,000	Sandfield Centre consideration for residential
	Nottm 39	Chalfont Dr	45,306	-	-	45,306	outline pp for residential
	Nottm 44	Siemens/Training Centre off Woodyard Ln	7,600	-	-	7,600	being considered through the local plan
	Nottm 67	Leen Gate	-	45,000	-	45,000	Combined with site 13 to create a 4.6hectare site:Outline planning permission has been granted for a £100 million MediPark scheme with the potential to create between 1,000-3,000 jobs. Construction will be in three phases with delivery of the first phase
		University Innovation Park,	-	20,000	-	20,000	Floorspace change 2006 - 2009 unknown as at 21 Dec 2009, zero assumed Floorspace change 2009 - 2026 estimated at one third of 60,000 sqm
	MU6	Hartwell (north of MU7.1)	-	17,000	-	17,000	pp for office and retail dev
	MU6	North of Daleside Road (former Magpie pub, Sunlight Laundry, NTL Offices)					Small addition of office space likely as part of mixed use scheme
	MU7.1	Eastcroft Depot					potential office site
	MU7.2	Trent Basin					Info from Trent Basin PA figs rounded (a new scheme for this site could deliver greater B1)
	MU7.3	Meadow Lane					Element of new office dev likely as part of resi led scheme - gateway sites near Lady Bay Bridge
	MU7.5	Freeth Street					loss of existing ind sites possible but new office likely as part of mixed use scheme -gateway sites near Lady Bay Bridge

GREATER NOTTINGHAM OFFICE FLOORSPEACE - 2006 - 2026 - NCRELS UPDATE

RUSHCLIFFE

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
	Bingham	Chapel Lane Extension					Site benefits from 82500 sqm Outline Planning Permission <i>but to be replaced</i>
	Bunny	Bunny Brickworks		6,788		6,788	Site benefits from Outline Planning Permission. Rechecked Fspace
	Cotgrave	Cotgrave Colliery		6,320		6,320	Based upon Planning Permission
	West Bridgford	Landmere Lane (Edwalton)		4,500		4,500	Part of Edwalton SUE
	East Bridgford	Manor Farm, East Bridgford			3,435		Complete since last spreadsheet
	Keyworth	Kingsley Durham Keyworth			2,850		
	West Bridgford	20 Loughborough Road West Bridgford			2,000		
	Bunny	Field House Farm Bunny (2)			1,260		
	Tollerton	Nottingham Airport		19,000		19,000	Planning permission granted for business park.
	Bingham	Moorbridge North. Bingham					<i>Original permission now to be replaced by LDF Allocation</i>
	Bingham	Moorbridge East, Bingham					<i>Original permission now to be replaced by LDF Allocation</i>
	Radcliffe on Trent	Spellow Farm Radcliffe on Trent		2,200		2,200	Planning permission
	Radcliffe on Trent	Shelford Lodge Radcliffe on Trent		609		609	Planning permission
	Ruddington	49 Easthorpe Street Ruddington		1,050		1,050	Planning permission
	Bradmore	Barn Farm Bradmore			336		Certificate of Lawful Use
	Radcliffe on Trent	St Marys Main road			450		Planning Permission
	Cotgrave	Wolds Farm Cotgrave			312		Planning Permission
	Costock	Leake Road Costock			597		Planning Permission
	Bunny	Bradmore Business Park Bunny		1,890		1,890	Complete
	Owthorpe	Odd House Farm		400		400	
	Normanton on Soar	Cedars Farm		420		420	

GREATER NOTTINGHAM OFFICE FLOORSPACE - 2006 - 2026 - NCRELS UPDATE

SUE & Regeneration Sites

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
Ash	Ash -H15	Rolls Royce Watnall Road - Allocation		10,000		10,000	
Ged	Top Wighay Farm		-	10,000	-	10,000	Available
Ged	E1(c)	Former Gedling Colliery	-	-	-	-	Available
Ere	Ere E4*	Stanton Regeneration Site, Lows Lane - Stanton		30,000		30,000	Mixed Use Regeneration scheme of which office is anticipated at 30,000 sqm. 10ha assumed to be area (in I&W s/s)
Ere	Ere SUE Site J1	Land to the North of Pewit, Golf Gourse, Ilkeston		-		-	N.B. Additional SUE site added by LPA now removed. SHLAA E195: 10-15yr tranche
Not	MU5.1	Bus Depot	-	10,000	-	10,000	Depot/garage/workshop site likley to be lost longer term but poss relocation gedling colliery a possibility. Redeve could include office space - large site could be larger office element if market demands.
Not	MU5.3	Sneinton Mkt	-	5,000	-	5,000	No loss as existing use retail. Redeve likley to include new commercial space - Source NRL
Not	MU5.4	Huntingdon Street	-	-	-	-	Site with potential for offices, assumed zero as at 21 dec 09
Not	MU5.5	Beck St Cowan Street	-	-	-	-	Site with potential for offices, assumed zero as at 21 dec 09
Not	Not allocated	Remainder of Eastside	-	10,000	-	10,000	Likely to be some gradual change (loss) in remaining Warehouses and Depots (Great Freeman Street, Howard Street, Lennox Street but limited impact. Scope for further office development on small sites. Est 10,000 office gain min possible. Poss further 10
Not	MU2	White land north of Water Way Street West	1,000	5,000	-	4,000	Likely office quarter development less dense than Sov House and Wilson Bowden but larger area -
Not	MU2	White land east of Arkwright Street	-	7,000	-	7,000	Much in good employment use, most obvious sites have been lost to resi already but could be further small changes, loss of ind likely to be outweighed by creation of B1.
Not	MU3.10	Arkwright Street East	-	1,500	- 182	1,500	Mostly retail. Small ind units to be lost to NET. But poss of new office/ind as part of comp redev. Includes loss of ind land at Picture Works.
Not	MU3.4	Canal Street south (South Reef)	-	7,000	5,000	7,000	Vacant car park for years so no net loss in2006-2009

GREATER NOTTINGHAM OFFICE FLOORSPEACE - 2006 - 2026 - NCRELS UPDATE

SUE & Regeneration Sites

District	Reference	Name	2011-2026 Floorspace change		NET FLSP CHANGE 2006-2011	NET FLSP CHANGE 2011-2026	LPA Comments
			Loss	Gain			
Not	MU3.5	The Hub	-	28,000	-	28,000	Based on DTZ appraisal of solely commercial scheme. Some ind lost due to demol of warehouses on Thames Water Land
Not	MU6	North of Daleside Road (former Magpie pub, Sunlight Laundry, NTL Offices)	-	1,800	-	1,800	Small addition of office space likely as part of mixed use scheme (NB owners looking for food retail permission if not supported this is a quality site for employment - potential for approx over 7000 sqm)
Not	MU7.1	Eastcroft Depot and Wing Yip	1,000	2,000	-	1,000	Rationalisation of part of depot site likely to accommodate Wing Yip and Hartwell Scheme - poss loss of third of ind floorspace (uses likely to be intensified on remaining site). Small amount office space likely poss. NB note no loss of B space on Wing
Not	MU7.3	Meadow Lane	-	4,400	-	4,400	Element of new office dev likely as part of resi led scheme - gateway sites near Lady Bay Bridge
Not	MU7.5	Freeth Street	-	3,200	-	3,200	Earmarked for Waterside centre and resi use - loss of existing ind sites v likely but new office likely as part of mixed use scheme -gateway sites near Lady Bay Bridge

Rus	Barton in Fabis	Clifton		12,000		12,000	planning app proposes 19,800sqm of B1a. 12,000 assumed on basis of RBC's latest position (RM)
Rus	Bingham	NO Bingham		10,000		10,000	Estimate of floorspace
Rus	Shelford	RAF Newton		8,900		8,900	Estimate of floorspace
Rus	Cotgrave	Cotgrave Colliery		-		-	Estimate of floorspace