



Employment Land Review (update)

Borough of Redditch
Core Strategy
Background Document

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Redditch Borough Employment Land Review Update 2011

Introduction

The Employment Land Review was adopted in March 2009. An Update Report was completed in June 2010. This document represents the 2011 annual update to the Employment Land Review (ELR) to present a clear picture of the current situation with regard to Employment Land demand, need and supply in Redditch Borough. The Employment Land Review has been reviewed at this point for a number of reasons which are detailed further below.

Due to its technical nature as part of the update it has been necessary to employ consultants to update parts of the review. GVA were commissioned to complete Stage 2 of the original 2009 ELR and therefore they have completed some of the updates necessary for this review.

The need for an update

National Changes

Localism Act – (Enacted 15th November 2011)

The National Planning system is going through a time of change. The Government have proposed to abolish Regional Spatial Strategies through the Localism Act which removes the need for the emerging Local Plan to be in conformity with a regionally proposed employment land target.

The Localism Bill was introduced to Parliament in December 2010. The intention of the Act is to shift power from Central Government back into the hands of individuals, communities and councils.

In order to achieve this, the Coalition Government have proposed to remove several instruments of top-down control. With regard to regional strategies the Localism Act will abolish regional targets in favour of democratic local decision making.

The Government have signalled through the Localism Act their intention to abolish these documents; however the employment target for Redditch in the West Midlands Regional Spatial Strategy (WMRSS) Phase Two Revision Panel Report (September 2009) is still a material consideration, subsequently

this document recommended an indicative long term requirement of 68ha¹ of employment land in the Borough and a rolling five year reservoir of 17ha².

National Planning Policy Framework (NPPF)

The Government have consulted on a draft National Planning Policy Framework; this framework is likely to require Redditch Borough Council to change its approach to employment land provision.

The Draft NPPF demonstrates the Governments commitment to supporting economic development. The NPPF sets out a number of requirements for Local Authorities to consider when preparing a Local Plan (which is signalled to replace Core Strategy's) with regard to employment land. However at the time of writing the NPPF is still a consultation document, the final document could be significantly different to the consultation document and therefore although the objectives of the NPPF have been considered when preparing this update, this has been done in the knowledge the final document may be different.

The Draft NPPF requests that Local Authorities consider the following issues in relation to economic development and employment provision in their areas (see page 9 of the Draft NPPF), these are to:

- Understand business needs within the economic markets operating in and across their area;

This was completed in Stage 1 of the original ELR in 2009.

- Work together with county and neighbouring authorities and within the local enterprise partnerships to understand both existing business needs and likely changes in the market;

This will be facilitated by Redditch's membership of two Local Enterprise Partnerships.

Existing business needs were considered through stage 1 of the ELR. Whilst predicting likely changes in market will be updated through this review.

¹ Of which at least 12 ha will be provided within Stratford-on-Avon District west of the A435 and the balance remaining out of a total of up to 37 ha will be provided in Bromsgrove District at a location or locations to be agreed in the Core Strategies for Redditch and Bromsgrove Districts.

² The Panel report stated that "Of which 8ha will be provided within Stratford-on-Avon District west of the A435". It is assumed that this related to the first rolling reservoir period. To date Government Office for the West Midlands has yet to confirm whether or not this is the case.

- Work closely with the business community to understand their changing needs and identify and address barriers to investment;

This was completed through Stage 1 of the ELR and will also be aided through the work of the Local Enterprise Partnerships.

- Use the evidence base to assess the requirements for land or floorspace for economic development; and

This will be assessed through this update.

- Use the evidence base to assess the existing and future supply of land available for economic development.

This will be completed as part of this update.

Change of Use Consultation

It is important to note that Central Government in this update period issued a consultation to extend the permitted development rights to allow B1 (Business) to change to C3 (dwelling houses) as part of its permitted development rights. This may potentially have implications of the future supply of land available for economic development within the Borough. As this emerging policy is not yet adopted its implications have not been fully assessed in this review, however the impacts of this policy on the employment land available in Redditch will need to be considered fully at the next review.

Local Changes

There is a need to re-assess the sites that currently form the employment land portfolio for Redditch to identify whether or not they are still suitable for employment purposes. It is also important to consider the completions and losses to Redditch's employment stock to have an understanding of the current situation within the Borough.

It is also considered necessary to assess sites which were not assessed in the original Employment Land Review to identify whether or not they are suitable for employment purposes.

This update to the Employment Land Review seeks to take account of the changing circumstances outlined above. As a result, this update recommends

a portfolio of local employment sites to meet local and strategic planning objectives for the Borough.

The role of the ELR update is to provide a robust evidence base on which to guide the policies in the emerging plan. This document informs the economic objectives of the plan and the subsequent policies contained within the plan, which set out how Redditch should be over the next 15 years.

It is the intention of this document to provide a complete situation with regard to demand, need and supply of the employment land in Redditch at the time of writing in order to inform the emerging plan.

The next ELR update is likely to re-assess the sites forming the portfolio of employment sites in line with its reconsideration of RSS development targets and housing land supply issues (related to the Strategic Housing Market Assessment due in the next ELR review period).

Updates to the Employment Land Review

The following updates that have been completed as part of this review.

Stage 1 'Taking Stock of the Existing Situation'

Stage 1 of the ELR requires a thorough understanding about what is happening in Redditch; these are the following updates to stage 1.

Step 1 – Devise brief for Stage 1

This has not been updated as part of this review as it is not required.

Step 2 – Collate Data on land stock and revealed demand

This has not been updated as this information can be found in Employment Land Review Stage 1 (2009).

Step 3 – Devise and apply Site appraisal criteria

This has not been updated as part of this review. The original appraisal criteria can be found in Stage 1 of the Employment Land Review. The site appraisal criterion was updated in the 2010 update following changes to Planning Policy Statement 4 (please see ELR 2010 Update for information on how the site appraisal criteria was updated).

It should be noted that the Government have recently consulted on a Draft National Planning Policy Framework which may have implications for how potential employment sites should be assessed. As this emerging policy is not yet adopted its implications have not been fully assessed in this review, this will need to be considered fully at the next review to consider the impacts of this policy on the site assessments of employment land available in Redditch.

Step 4 - Undertake Preliminary site appraisal

The Borough Councils Strategic Housing Land Availability Assessment (SHLAA) is completed each year. It is important to assess any site that may have been submitted to the SHLAA which was deemed unsuitable for housing to be assessed for its potential as an employment site. There are no sites that were considered suitable to assess for employment potential as a result of the SHLAA process. This could be updated in the next ELR.

Based on a preliminary analysis there is one site that is considered suitable to take forward for a full analysis. This is Edward Street located in the Town Centre.

Step 5 – Confirming the brief for Stage 2 and 3

Complete.

Stage 2 'Creating a Picture of Future Requirements'

Step 6 – Understand market areas and segments

This step seeks to set out the nature of the property market in terms of geography and market segments within Redditch Borough.

It is considered that the most appropriate boundaries for the analysis of demand and supply, for practicality purposes are the Borough boundaries.

In addition there are particular characteristics of Redditch which make it unique. Redditch has specific designated employment areas, based on the principles of New Town design and subsequent Masterplan. The Masterplan designated industrial land to accommodate the new industries moving into Redditch. There are four distinct employment areas within Redditch they are Enfield, Park Farm, Washford and Moons Moat. These sites are considered to be general industrial/ business areas and are the predominant areas that are available for employment development.

Step 7 – Select and apply suitable forecast model/ demand analysis

Consultants GVA were employed to complete Step 7 of this review. A six stage approach has been used by the consultants to adapt the model used in the 2009 report, to ensure consistency with previous work. Wherever possible and appropriate the assumptions made within the model have remained constant. Where any assumptions have been changed, this is clearly indicated. The six stages of work are set out below.

Step 7: Stage 1 – Source up to date economic/employment projections

The updated baseline employment projections utilised the Cambridge Econometrics (CE) Local Economy Forecasting Model (LEFM), which provided Gross Value Added (GrVA) and employment projections across the same 41 industrial sectors. The projections are consistent with the latest CE forecasts published in the 'Economic Prospects for the Nations and Regions of the UK' report in February 2011 and include historic data from 1981 to 2008 with projections from 2009 to 2031 for Redditch Borough. As in the previous study, it is important to note that these projections represent the results of model-based analysis, focusing on the future performance of the existing industrial structure in Redditch, and have not been refined in light of any qualitative information, legislative changes or other 'soft' information.

Step 7: Stage 2 – Re-base Employment Growth Assumptions

The employment scenarios developed for the 2009 report were based on 2006 employment data, which was the most up to date ABI data available at the time. Currently, the latest available ABI data is for 2008 and all new scenarios have been developed using 2008 ABI data. These updated scenarios therefore include historical employment data up to 2008 with

projections from 2009 to 2031. It is therefore important that care is taken in making comparisons between the figures in this report and the 2009 report.

Step 7: Stage 3 – Create an Updated Baseline Scenario

The baseline scenario has been updated with the new employment projections produced by the CE LEFM model. The LEFM growth rates have been applied to the latest ABI data to generate baseline employment projections to 2031.

Step 7: Stage 4 – Create an Updated Past Trends Scenario

The 'Past Trends' Scenario in the 2009 report was based on an analysis of recent past economic trends to set overall employment growth targets for 2026. It was based on past employment trends only and did not take account of housing or local economic development policies. The past trends scenario projected by far the strongest employment growth of all scenarios included in the 2009 report, even after diluting its effect by applying a 'three-quarter' trend, rather than a full trend (i.e. assuming employment would continue to grow at three quarters of the average annual growth rate over the period 1998 to 2006).

However, the recent economic recession has had a significant impact on employment levels in Redditch, and the latest ABI data shows that employment in Redditch in 2008 was lower than at any other time in the last ten years (i.e. the full period of ABI data from 1998 to 2008). Therefore updating the previous past trends scenario (using trends from 1998 to 2008) now projects a slight decline in employment in Redditch over the period 2008 to 2031. Although further declines in employment are likely in the short term, it is highly unlikely that employment will continue to decline to 2031. This past trends scenario is therefore likely to be overly biased by the recent recession and employment declines and employment growth should return positive a long time before 2031.

As a result of the significant change in employment levels since the 2009 report, and the strong influence of the recent downturn on long term employment projections to 2031, a number of alternative 'past trend' scenarios have also been included for comparison. These alternative scenarios are described below:

- A 'full trend' scenario – updating the previous past trends scenario by calculating the average annual growth rate over the period 1998 to 2008 and applying this to project total employment in 2031. This scenario projects a decline in total employment of -0.1% per annum between 2008 and 2031.
- A 'no growth' scenario – assuming that total employment continues to decline in the short term, before returning to 2008 levels by 2031, and thereby achieving zero growth between 2008 and 2031.

- A 'return to pre-recession employment' scenario – assuming slow growth in total employment, accelerating over the period, to return to 2006 (pre-recession) employment levels by 2031. This scenario projects average employment growth of 0.6% per annum between 2008 and 2031.
- A 'pre-recession' trend scenario – excluding the lower employment in 2007 and 2008 to calculate a trend from 1998 to 2006 (the same period as in the 2009 report) and applying this to the lower employment level in 2008. This scenario assumes that total employment in Redditch will grow at pre-recession growth rates from the period 2008 to 2031 and projects by far the strongest average growth of all of scenarios of 1.7% per annum.

As in the 2009 report, it is unreliable to project employment in each individual sector in Redditch based upon past trends because large fluctuations in smaller sectors at Borough level can predict irrationally high positive or negative growth rates and volatile changes in employment in some sectors. Therefore, the past trend scenarios are again based on an analysis of average annual trends, using a combination of percentage and absolute changes, over the period 1998 to 2008.

Therefore, for each sector with an unrealistic, unsustainable or excessively negative rate of projected employment growth, the average annual percentage growth rate from 1998 to 2008 has been replaced with a more appropriate growth rate, based on either:

- Quarter, half or three-quarter trend of the average annual percentage growth rate, or;
- Quarter, half, three-quarter or full trend of the average annual absolute change.

The one exception to the above is the research and development sector, where minor changes in the relatively small number of employees can have very significant impacts on employment estimates by 2031. For this sector, a full trend has been calculated over the period 1999 to 2008 (excluding 1998) and applied to generate projections to 2031 under all past trends scenarios.

The 'selected' rates applied to each sector differ across the different past trends scenarios described above and were selected and applied such that total employment in Redditch achieves the specific aim of each scenario (i.e. declines at the 'full trend' rate calculated from 1998 to 2008; achieves 'no growth' from 2008 to 2031; returns to 2006 – pre-recession – levels by 2031; or, grows at the pre-recession growth rate calculated from 1998 to 2006). The chosen methodology for each relevant sector and each 'past trends' scenario is shown in Table 2.1 below.

Table 2.1 – Selection of Appropriate Past Trends Projections for Relevant Sectors

Industry	Past Trends Scenario 1 - 'Full Trend'	Past Trends Scenario 2 - 'No Growth'	Past Trends Scenario 3 - 'Return to 2006 Pre-Recession Employment'	Past Trends Scenario 4 - 'Pre-Recession Trend'
01: Agriculture/hunting, etc.	¼ absolute	½ absolute	Full absolute	
14: Other mining & quarry	Full absolute			
15: Manf - food & beverages	½ absolute		½ % growth	
17: Manf - textiles	¼ % growth			
21: Manf - pulp & paper products	¼ % growth			
22: Publishing & printing	¾ % growth	½ % growth	¼ % growth	
25: Manf - rubber & plastic	½ % growth		¼ % growth	
27: Manf - basic metals	¾ % growth		½ % growth	
28: Manf - fabricated metal	¾ % growth	½ absolute		½ % growth
29: Manf - other machinery	¾ % growth	½ % growth	¼ % growth	
34: Manf - motor vehicles, trailers	¼ % growth			
35: Manf - transport equipment	¼ absolute	½ absolute	¾ % growth	
36: Manufacturing n.e.c.	¼ absolute	½ absolute	Full absolute	¾ % growth
45: Construction	¼ % growth	½ % growth		
50: Sale & repair of vehicles & fuel	½ % growth			¼ % growth
51: Wholesale trade	¼ % growth			
52: Retail trade	¼ absolute	¼ % growth	Full absolute	
55: Hotels & restaurants	¼ absolute	¼ % growth	Full absolute	
63: Supporting transport activities	¼ absolute		½ absolute	¼ % growth
64: Post & telecommunications			½ % growth	
65: Financial intermediation	¼ absolute		¼ % growth	
67: Auxiliary financial activities	¼ absolute	¾ % growth		
70: Real estate activities			¼ absolute	¼ % growth
72: Computer & related activities			¼ absolute	
73: Research & development	Full % growth (1999 to 2008) – i.e. excluding 1998			
74: Other business activities			¼ % growth	
80: Education	¼ absolute		¼ % growth	¾ % growth
85: Health & social work	¼ absolute		¼ % growth	¾ % growth
91: Activities of membership orgs	¼ absolute			
92: Recreation, culture & sport activ.	¼ absolute		½ absolute	½ % growth
93: Other service activities	¼ absolute		¼ % growth	

Source: GHK analysis, 2011

Step 7: Stage 5 - Policy-On (Housing-Based) Scenarios:

The latest Redditch Borough Council housing targets described above provide a range of possible scenarios in terms of the number of new dwellings expected to be constructed in Redditch Borough between 2006 and 2031. Since 2008 is the latest available ABI employment data, it is also important to take account of any dwellings constructed between 2006 and 2008 to avoid double-counting dwellings within the projections.

Housing completions data is monitored and published by RBC and the 2010 'Housing Completions in Redditch Borough on Large and Small Sites' report states that there were 454 housing completions in 2006/07 and 236 in 2007/08, totalling 690 completions between April 2006 and April 2008. These dwellings must therefore be subtracted from the future housing targets to avoid double-counting these dwellings and enable employment requirements to be projected from 2008 to 2031. The three scenarios therefore assume:

- Scenario A-1 – 6,310 new dwellings between 2008 and 2031;
- Scenario A-2 – 3,310 new dwellings between 2008 and 2031; and
- Scenario A-3 – 2,510 new dwellings between 2008 and 2031.

The process for converting these housing targets into employment projections is unchanged from the 2009 report, although some of the assumptions have been updated where appropriate. This process has involved:

- Multiplying the projected numbers of additional houses by 2.4 persons per dwelling to provide estimates of the implied increase in population associated with each scenario by 2031;

- Using the latest available projections and estimates of the working age and economically active population in Redditch to estimate the number of additional people available for employment. The latest forecasts from Worcestershire County Council suggest that 55.3% of the Redditch population in 2031 is likely to be of working age (this has increased slightly from 53.7% at the time of the 2009 report). However, Worcestershire County Council was unable to provide updated projections of economic activity because of the increased levels of uncertainty caused by the recent economic situation. As an alternative, projections of economic activity have been based on the latest available data provided by the ONS Annual Population Survey (based on an average over the five year period from July 2005 to June 2010, which has been assumed for 2031). This suggests that 78.5% of the working age population will be economically active in 2031, which is slightly lower than the assumption of 83.8% provided by Worcestershire County Council for the 2009 report.

- Converting these additional economically active people into the additional number of jobs that will need to be generated in Redditch by 2031 in order to maintain the existing level of "Job Balance" of 86.9% (again based on 2001 Census data). This provides additional jobs targets of 5,710 for Scenario A-1, 2,995 for Scenario A-2 and 2,271 for Scenario A-3, as presented in Table 2.2.

Table 2.2 – Conversion of RBC Housing Targets to Employment Growth

	Scenario A-1	Scenario A-2	Scenario A-3
Potential New Dwellings (2008-2031)	6,310	3,310	2,510
Implied Population Increase (2008-2031)	15,144	7,944	6,024
Implied Increase in Working Age Population (2008-2031)	8,375	4,393	3,331
Implied Increase in Economically Active (2008-2031)	6,574	3,449	2,615
Total Additional Jobs (2008-2031)	5,710	2,995	2,271

Sources: RBC Housing Targets 2006-2031; RBC 2010 'Housing Completions in Redditch Borough on Large and Small Sites' report; Worcestershire County Council; 2001 Census data; and GHK analysis, 2011

The projected distribution of these additional jobs between sectors has remained consistent with the assumptions used in the 2009 report, as much as possible. For instance, the same 'dwellings-to-job' ratios have been applied to the same 'non basic' sectors such as education, health, retail, where the size of the sector is likely to be closely related to the number of dwellings.

As part of the work on the 2009 report, RBC Councillors identified a total of 11 'priority' sectors, which at the time, were expected to be targeted economic development policy sectors in the future and alternative growth assumptions were applied to these sectors to reflect.

In this report it has been assumed that the same sectors remain a priority for RBC in order to be consistent with the 2009 report, although the selected 'treatment' (applied growth assumptions) of these sectors has changed in line with the lower projections of future employment and housing growth within the Borough. Furthermore, several of the priority sectors were assumed to grow at the projected county growth rate in the 2009 report, and it was not possible to update the county projections as part of this study, so alternative 'treatments' have been applied to these sectors.

As in the 2009 report, some of these priority sectors are expected to perform better than the LEFM projections would suggest, while others are expected to reverse declining trends by 2031. The treatments applied to these priority sectors included:

- Applying a quarter, half, three-quarter or full trend of the average annual percentage growth rate calculated from ABI data between 1998 and 2008;
- Applying a quarter, half, three-quarter or full trend of the average annual absolute change calculated from ABI data between 1998 and 2008, and;
- Keeping the LEFM forecast.

Table 2.3 shows the selected 'treatment' and projected average annual growth rate of each priority sector and compares this to the respective average annual LEFM growth rate.

Table 2.3 – Selection of Appropriate Projections for Priority Sectors

Sector	Industry	Chosen Methodology		Redditch LEFM
		Description	Average Annual % Growth (2008-2031)	Average Annual % Growth (2008-2031)
Manufacturing	24 : Manufacture of chemicals and chemical products	Past Trend: Full % growth rate	0.02% p.a.	-2.2% p.a.
Manufacturing	29 : Manufacture of other machinery and equipment	Past Trend: ¼ % growth rate	-0.8% p.a.	-1.5% p.a.
Manufacturing	31 : Manufacture of other electrical machinery and apparatus	Redditch LEFM Projections	2.0% p.a.	2.0% p.a.
Manufacturing	33 : Manufacture of medical, precision and optical instruments	Redditch LEFM Projections	2.0% p.a.	2.0% p.a.
Manufacturing	34 : Manufacture of motor vehicles	Redditch LEFM Projections	1.1% p.a.	1.1% p.a.
Basic Service	64 : Post and telecommunications	Past Trend: ¼ % growth rate	-0.5% p.a.	-0.7% p.a.
Basic Service	65 : Financial intermediation	Redditch LEFM Projections	-0.3% p.a.	-0.3% p.a.
Basic Service	67 : Activities auxiliary to finance	Past Trend: Full absolute change	2.8% p.a.	-0.3% p.a.
Basic Service	72 : Computer and related activities	Redditch LEFM Projections	0.3% p.a.	0.3% p.a.
Basic Service	73 : Research and development	Past Trend: Full % growth (1999 to 2008) excl 1998	22.0% p.a.	2.2% p.a.
Basic Service	74 : Other business activities	Redditch LEFM Projections	0.9% p.a.	0.9% p.a.

Source: GHK analysis, 2011

The projections of all other ‘non-priority’ sectors are also consistent with the 2009 report, although the respective baseline LEFM projections have been applied to the latest 2008 ABI data in order to generate projections to 2031.

Although the same assumptions have been applied to each of the policy-on, housing-based scenarios, the employment projections vary according to the different number of new houses projected under each scenario.

Finally, each sector total has been adjusted either up or down in proportion to the distribution of total employment in 2008 in order to control the sectoral changes proportionately back to the respective jobs targets for 2031 under each scenario. This is also consistent with the previous approach as described in the 2009 report, with a straight line trend assumed for all sectors between 2008 and 2031.

Step 7: Stage 6 – Calculate Employment Floorspace and Land Requirements: 2008 to 2031

The assumptions described above have been applied to generate employment projections at the 2 digit SIC level for each scenario over the period 2008 to 2031 and the 2031 figures are presented in Table 2.4.

Table 2.4 – Summary of Employment Projections based on Economic Scenarios

	2008 Actual	2031							Policy-On (A-1)	Policy-On (A-2)	Policy On (A-3)
		Baseline	Past Trends Scenario 1	Past Trends Scenario 2	Past Trends Scenario 3	Past Trends Scenario 4					
01: Agriculture/Hunting, etc.	69	90	108	146	223	223		90	89	88	
02: Forestry, logging etc.	1	1	1	1	1	1		1	1	1	
05: Fishing, fish farms etc.	1	1	1	1	1	1		1	1	1	
10: Coal mining, peat extraction	0	0	0	0	0	0		0	0	0	
11: Petroleum, Oil/Gas Services	0	0	0	0	0	0		0	0	0	
14: Other mining and quarry	5	0	12	12	12	12		0	0	0	
15: Manf. - food and beverages	417	294	226	226	295	295		287	276	273	
16: Manf. - tobacco	0	0	0	0	0	0		0	0	0	
17: Manf. - textiles	36	60	20	20	20	20		60	59	59	
18: Manf. - wearing apparel	1	2	0	0	0	0		2	2	2	
19: Tanning and dressing of leather	16	27	3	3	3	3		27	27	27	
20: Manf. - wood products	57	36	65	65	65	65		36	35	35	
21: Manf. - pulp and paper products	54	34	26	26	26	26		34	33	33	
22: Publishing and Printing	291	257	70	113	183	183		259	251	250	
23: Manf. - coke, petroleum products	0	0	0	0	0	0		0	0	0	
24: Manf. - chemicals and chemical products	437	265	439	439	439	439		442	431	428	
25: Manf. - rubber and plastic products	648	470	310	310	450	450		474	458	453	
26: Manf. - other non-metallic mineral products	124	0	104	104	104	104		0	0	0	
27: Manf. - basic metals	454	193	201	201	265	265		196	184	181	
28: Manf. - fabricated metal products	3,087	2,548	1,913	1,953	1,953	2,241		2,587	2,490	2,489	
29: Manf. - other machinery	883	628	486	604	731	731		736	714	708	
30: Manf. - office machinery and computers	12	5	3	3	3	3		5	5	5	
31: Manf. - other electrical machinery	1,161	1,814	953	953	953	953		1,821	1,792	1,784	
32: Manf. - communication equipment	60	26	11	11	11	11		26	25	24	
33: Manf. - medical instruments	837	995	493	493	493	493		999	993	979	
34: Manf. - motor vehicles, trailers	396	504	219	219	219	219		506	496	494	
35: Manf. - transport equipment	110	28	142	174	379	379		29	26	25	
36: Manf. - furniture; manufacturing n.e.c.	600	429	763	925	1,251	1,819		433	418	414	
37: Recycling	2	1	0	0	0	0		1	1	1	
40: Electricity, gas, steam and hot water supply	10	10	405	405	405	405		10	10	10	
41: Collection, purification and distribution of water	22	0	22	22	22	22		0	0	0	
45: Construction	1,246	1,528	1,318	1,390	1,551	1,551		1,590	1,414	1,367	
50: Sale and repair of motor vehicles and fuel	928	952	510	510	689	689		1,072	988	988	
51: Wholesale trade	2,214	2,276	2,267	2,267	2,433	2,433		2,290	2,204	2,219	
52: Retail trade	5,003	4,813	5,803	5,730	7,404	8,571		5,811	5,352	5,229	
55: Hotels and restaurants	1,419	1,316	1,769	1,971	2,817	5,138		1,820	1,616	1,562	
60: Land transport	429	473	516	516	516	516		476	465	462	
61: Water transport	0	0	0	0	0	0		0	0	0	
62: Air transport	7	7	7	7	7	7		7	7	7	
63: Supporting transport activities/travel agencies	575	634	870	870	1,165	2,312		636	623	619	
64: Post and telecommunications	752	642	464	464	591	591		672	653	648	
65: Financial intermediation	277	256	183	183	213	213		258	251	249	
66: Insurance and pension funding	2	0	0	0	0	0		0	0	0	
67: Auxiliary financial activities	172	159	211	405	535	535		327	323	322	
70: Real estate activities	254	436	112	112	191	207		381	309	295	
71: Renting of machinery and equipment	144	247	125	125	125	125		248	244	243	
72: Computer and related activities	525	565	348	348	468	468		568	555	551	
73: Research and development	6	10	584	584	584	584		585	584	584	
74: Other business activities	4,243	5,249	3,716	3,716	4,105	4,105		5,275	5,168	5,140	
75: Public administration and defence	1,225	1,185	915	915	915	915		1,659	1,446	1,388	
80: Education	2,963	3,427	3,484	3,484	3,665	5,577		3,709	3,323	3,219	
85: Health and social work	4,289	5,853	4,847	4,847	4,977	6,684		5,155	4,887	4,582	
90: Sewage and refuse disposal	14	12	14	14	14	14		12	12	12	
91: Activities of membership organisations	421	373	445	445	536	536		506	461	449	
92: Recreational, cultural and sporting activities	675	599	949	949	1,222	2,670		896	788	757	
93: Other service activities	341	302	412	412	444	964		427	383	371	
Total	37,693	39,622	36,873	37,693	43,483	54,965		43,403	40,888	39,964	

Source: GHK analysis, 2011

Since the 2009 report, ABI data suggests that total employment in Redditch declined in 2007 and 2008, falling from a peak of 43,489 employees in 2006 to 37,693 in 2008. This represents a decline in total employment of more than 13%, which is significantly larger than the declines experienced at the county (-3.0%) and regional (-0.8%) levels over the same period.

There have also been some significant changes to levels of employment within individual sectors within Redditch. Sectors experiencing particularly large employment declines between 2006 and 2008 include 'Other Business Activities', 'Manufacture of Rubber and Plastic Products', 'Land Transport',

and a number of other manufacturing sectors. Some of this decline has been offset by employment growth between 2006 and 2008, the most significant of which was experienced in 'Hotels and Restaurants', 'Distribution', 'Education', 'Construction' and 'Supporting Transport Activities' sectors.

The declining employment experienced in Redditch has resulted in lower projections of future employment compared to those in the 2009 report because of the lower base level of employment in 2008 (compared to 2006 ABI data) and because of more conservative projections for future employment and housing within the Borough. For example, the 2009 baseline scenario projected employment growth at an average of 0.5% per annum, adding more than 4,700 jobs between 2006 and 2026, while the latest baseline scenario is much more conservative, projecting employment growth of 0.2% per annum, adding approximately 1,900 new jobs between 2008 and 2031.

The difference between the past trend scenarios is even more significant. The three quarter trend included in the 2009 report projected average annual employment growth of 1.2%, adding 11,500 new jobs between 2006 and 2026. The latest ABI data actually projects a decline in employment of -0.1% per annum, based on a full trend between 1998 and 2008, leading to the loss of a further 1,000 jobs between 2008 and 2031. In comparison, the 'no growth' past trends scenario assumes employment in 2031 returns to 2008 levels, while employment would need to grow by an average of 0.6% per annum to return to 2006 employment levels. The pre-recession trend, which excludes the employment declines of 2007 and 2008 from the trend, is unlikely to be realistic or sustainable, projecting growth of 1.7% per annum and more than 17,000 new jobs in Redditch between 2008 and 2031.

The policy-on, housing-based scenarios are also lower than the projections in the 2009 report as a result of the employment decline between 2006 and 2008, and the reduced projections for new dwellings in the Borough. The 2009 report included two policy-on scenarios projecting 6,600 and 9,100 new dwellings respectively, compared to the lower range of between 2,510 and 6,310 used in this updated report. The projected employment growth associated with these scenarios has also fallen, from between 0.7% and 0.9% per annum in the 2009 report, to between 0.3% and 0.6% per annum in this latest update.

There are also some significant differences in the employment projections of some individual sectors, compared to the 2009 report. The largest differences are closely correlated with the sectors described above, that have experienced significant changes in employment between 2006 and 2008. For example, the employment projections in the 'Other Business Activities' sector have fallen most significantly since the 2009 report. The other sectors demonstrating lower employment projections in the new scenarios are typically concentrated in manufacturing sectors including: 'Rubber and Plastic Products', 'Basic Metals', 'Metal Products', 'Food and Beverages' and 'Publishing and Printing' sectors. Similarly, the sectors demonstrating higher employment projections in the new scenarios include: 'Education', 'Health and

Social Work', 'Manufacture of Electronics, Electrical Engineering and Instruments', 'Agriculture', 'Research and Development' and 'Utilities' sectors.

In order to convert the employment projections into floorspace requirements, the above employment projections have been translated into the same 25 sector groupings as used in the 2009 report. The employment projections associated with the new scenarios are presented in Table 2.5 for the 25 sector groups in 2031.

Table 2.5 – Employment in Selected Sector Groups

	2008 Actual	2031							Policy-On (A-1)	Policy-On (A-2)	Policy On (A-3)
		Baseline	Past Trends Scenario 1	Past Trends Scenario 2	Past Trends Scenario 3	Past Trends Scenario 4					
M1 Food, drink, tobacco & textiles	470	373	248	248	307	307	378	384	381		
M2 Printing & publishing	281	257	70	113	183	183	259	251	250		
M3 Chemicals & chemical products	437	285	439	439	439	439	442	431	420		
M4 Rubber & plastic products	648	470	310	310	450	450	474	458	453		
M5 Wood, paper & non-metallic mineral products	235	89	194	194	194	194	71	88	87		
M6 Basic metals	454	193	201	201	265	265	196	184	181		
M7 Metal goods	3,087	2,548	1,913	1,953	1,953	2,241	2,567	2,490	2,489		
M8 Mechanical engineering	883	626	498	604	731	731	736	714	708		
M9 Electronics, electrical engineering & instruments	1,870	2,841	1,461	1,461	1,461	1,461	2,851	2,804	2,792		
M10 Motor vehicles & other transport equipment	506	532	361	393	598	598	535	522	519		
M11 Manufacturing nes	602	430	783	928	1,251	1,619	434	419	414		
S1 Construction	1,246	1,528	1,316	1,390	1,551	1,551	1,590	1,414	1,367		
S2 Distribution	3,140	3,227	2,777	2,777	2,944	3,122	3,361	3,222	3,185		
S3 Retailing	5,003	4,613	5,603	5,730	7,404	8,571	5,811	5,352	5,229		
S4 Hotels & catering	1,419	1,316	1,789	1,971	2,817	5,138	1,820	1,618	1,562		
S5 Land transport	1,004	1,107	1,386	1,386	1,681	2,828	1,113	1,068	1,061		
S6 Communications	752	642	464	464	591	591	672	653	648		
S7 Insurance, banking & finance	451	416	393	588	749	749	585	574	571		
S8 Computing services	525	555	348	348	486	486	568	555	551		
S9 Professional services	404	693	821	821	901	917	1,190	1,138	1,123		
S10 Other business services	4,243	5,249	3,716	3,716	4,105	4,105	5,275	5,168	5,140		
S11 Public administration & defence	1,225	1,185	915	915	915	915	1,659	1,448	1,389		
S12 Education	2,063	3,427	3,484	3,484	3,665	5,577	3,709	3,323	3,219		
S13 Health & social work	4,289	5,653	4,847	4,847	4,977	8,684	5,155	4,687	4,582		
S14 Other services	1,451	1,257	1,820	1,820	2,217	4,385	1,843	1,641	1,588		
Total	37,678	39,612	38,117	37,099	42,812	64,284	43,293	40,581	39,868		

Source: GHK analysis, 2011

The consultant's transformation model has been used to apply employment moderators and then allocate employment in each sector group between the standard land use categories. Employment densities have then been applied to convert the employment projections into gross external floorspace requirements.

This is the same approach to the 2009 report although there have been minor changes to some assumptions. Firstly, where an employment group is allocated to more than one land use class, the assumptions regarding the proportion of employment within each land use class have been updated with the latest ABI data, for example to reflect the split between employment in hotels and employment in restaurants for the study area. Secondly, the employment densities in the model have been amended and updated to ensure consistency with the 2010 Employment Densities Guide (2nd Edition), developed by Drivers Jonas Deloitte.

The resulting estimates of floorspace requirements for 2031 are summarised in Table 2.6 below. Detailed tables for each individual scenario can be found at

Table 2.6 – Redditch Floorspace Requirements by Land Use Class (sq. m): Total Requirement 2031 and Change in Requirement 2008 – 2031, by Scenario

	2008	Redditch – Total Floorspace Requirement 2031							
		Baseline	Past Trends 1	Past Trends 2	Past Trends 3	Past Trends 4	Policy-On A-1	Policy-On A-2	Policy-On A-3
A1	44,935	41,648	49,699	50,806	65,689	75,845	52,080	48,049	46,974
A2	80,099	74,591	91,609	94,681	118,874	175,179	99,145	90,909	88,713
A3	29,852	27,678	37,207	41,461	59,271	108,091	38,281	33,996	32,853
B1a	147,330	170,331	143,832	146,383	165,660	180,163	191,039	179,862	176,881
B1b	1,092	1,873	2,220	2,220	2,435	2,479	3,224	3,075	3,035
B1c	101,063	153,523	78,939	78,939	78,939	78,939	154,104	151,560	150,882
B2	318,014	250,840	217,271	231,570	270,240	304,174	264,438	255,881	253,599
B8	281,298	285,525	271,779	271,779	310,829	405,030	294,636	284,617	281,945
C1	5,268	4,884	6,566	7,317	10,460	19,075	6,756	5,999	5,798
Total	1,008,951	1,010,893	899,121	925,157	1,082,396	1,348,974	1,103,702	1,053,948	1,040,681
	2008	Redditch – Absolute Change in Floorspace Requirement 2008- 2031							
		Baseline	Past Trends 1	Past Trends 2	Past Trends 3	Past Trends 4	Policy-On A-1	Policy-On A-2	Policy-On A-3
A1	-	-3,287	4,764	5,871	20,754	30,910	7,145	3,114	2,039
A2	-	-5,508	11,510	14,583	38,775	95,081	19,046	10,810	8,614
A3	-	-2,175	7,355	11,609	29,419	78,238	8,429	4,143	3,001
B1a	-	23,001	-3,498	-947	18,330	32,833	43,710	32,532	29,551
B1b	-	781	1,128	1,128	1,343	1,387	2,132	1,983	1,943
B1c	-	52,460	-22,124	-22,124	-22,124	-22,124	53,040	50,497	49,819
B2	-	-67,174	-100,744	-86,444	-47,774	-13,840	-53,576	-62,133	-64,415
B8	-	4,227	-9,519	-9,519	29,531	123,732	13,338	3,319	647
C1	-	-384	1,298	2,049	5,192	13,807	1,487	731	530
Total	-	1,942	-109,830	-83,794	73,445	340,023	94,751	44,997	31,729

Source: GHK analysis, 2011

Table 2.6 shows that the total floorspace requirements in 2031, and the change between 2008 and 2031, are consistent with the overall employment projections for each scenario. For instance, the baseline scenario projects a very slight increase in the demand for floorspace in Redditch by 2031. The past trends scenarios provide a range of floorspace projections from falling demand for floorspace under the ‘full trend’ and ‘no growth’ scenarios, to a large increase in demand under the ‘prerecession trend’ scenario. The three policy-on, housing-based scenarios project increasing demand for floorspace of between 32,000 and 95,000 additional sq m by 2031, which is similar to the past trends scenario based on a return to 2006 levels of employment.

The scenarios are consistent in terms of projecting declining demand for manufacturing (B2) floorspace to 2031, although there are a number of differences for the other land use classes. The baseline scenario projects

growth in demand for office (B1a), research and development (B1b), light industrial (B1c) and storage and distribution (B8), but declining demand for retail (A1), financial and professional services (A2), food and drink (A3) and hotel (C1) floorspace by 2031. However, the policy-on scenarios project growth in demand for all land use classes, except for manufacturing (B2). Finally, the past trend scenarios project declining demand for light industrial (B1c) and manufacturing (B2) floorspace, while the two scenarios projecting an overall decline in demand for floorspace also project slightly lower demand for office (B1a) and storage and distribution (B8) floorspace. The past trends scenarios project increased demand for all other land use classes by 2031.

Employment Land

The process of converting employment floorspace requirements to estimates of land has involved applying a number of key assumptions relating to churn, leakage, development plot ratios and net to gross ratios to the employment floorspace figures. We have applied the same assumptions as set out in the 2009 report to take account of these factors and these assumptions are set out in paragraphs 3.7 to 3.21 of the 2009 report.

Completions

The demand forecasts we have prepared use the 2008 ABI data as the base date and run to 2031. It is important to take account of development that has taken place in the period between 2008 to 2011, in order that the forecasts provide an up to date picture of employment land requirements. Therefore, we have subtracted total employment land completions between 2008 to 2011 from the forecasts to take account of development that has already taken place. The total completions of employment land between 2008 to 2011, by use class, are set out in Table 2.6 below.

Table 2.6 – Completions of Employment Floorspace and Land in Redditch: 2008 to 2011

Monitoring Year	Employment Floorspace Completed by Land Use Class			Total
	B1	B2	B8	
2008 / 09	0	0	0	0
2009 / 10	0	2,164	0	2,164
Total	0	2,164	0	2,164

Monitoring Year	Employment Land Completed by Land Use Class			Total
	B1	B2	B8	
2008 / 09	0.00	0.00	0.00	0.00
2009 / 10	0.00	0.82	0.00	0.82
Total	0.00	0.82	0.00	0.82

Source: Employment Commitments in Redditch Borough 1996 – 2010

Based on the information set out above, we have subtracted a total of 2,164 sq m (0.82ha) of B2 floorspace / land from the demand forecasts, in order to align them to 2011.

Step 8 – Quantify Employment Land Supply

Stock Analysis

The Existing available employment sites following sites will be assessed as part of this review, the sites assessments can be found at Appendix A:

New Sites:

- Edward Street, Town Centre

Flow analysis

Completions

This includes take-up of planning permission granted for office, industrial and warehouse development. This can be analysed by considering the completions. They are as follows:

2006 – 2007	2007 – 2008	2008 – 2009	2009 – 2010	2010 – 2011	Total
6	1.65	No completions	0.82	0.004	8.47

Losses

The following losses can also be demonstrated from 2006. In comparison to completions **these losses can be considered to be significant and therefore demonstrates the particular need for Redditch to retain as much employment land as possible for economic purposes** and resist applications for non- employment development on allocated employment sites.

2006 - 2007	2007 - 2008	2008 - 2009	2009 - 2010	2010 – 2011	Total
3.38	0.84	1.84	0.08	0.09	6.23

The following commitments also contribute to the employment land portfolio. Commitments from Local Plan No.3 have been re-assessed and will be carried forward to form part of the employment land portfolio for the emerging Local Plan:

Sites allocated for employment uses in Local Plan No.3 in order to meet the Strategic Employment Target for the period 1996-2011.				
Site No.	Site Name	Site Area (Ha) (Capacity)	Brownfield/ Greenfield	Status as at 31 st Oct 2011
IN 15	Woolaston Road, Park Farm (N)	0.40	G	Available
IN 19*	Studley Road, (Aeroquip), Park Farm (N)	5.84 (part complete)	B	1.44 Ha still available
IN 20	Old Forge Drive, (BACO), Park Farm (N)	1.32	G	Available
IN 24	Windsor Road Gas Works, Enfield	0.90	B	Available
IN 34	Merse Road, Moons Moat (N)	0.65	G	Available
IN 37	Bartleet Road, Washford	0.62	G	Available
IN 38	Adj. 47/52 Heming Road, Washford	0.22	G	Available
IN 52	Shawbank Road, Lakeside	1.03	G	Available
IN 54	Palmers Road, Moons Moat (E)	0.29	G	Available
IN 58	Crossgate Road, Park Farm (N)	1.10	G	Available
IN 59	Adj. Greenlands Business Centre, Studley Road, Park Farm (N)	0.38	G	Available
IN 61	Studley Road/ Green Lane, Park Farm (S)	0.43	G	Available
IN 67	ADR Land at Brockhill (gross developable area)	6.60	G	Planning Application Approved
IN 69 (as this site forms part of the wider strategic site this will now form part of IN 86)	Land rear of Alexandra Hospital (B1 use only)	2.00	G	Available
IN 73	Land at Union Street	0.19	G	Available
Total				21.97 Ha
Planning Applications for Employment Uses on non-employment sites (April 2011 monitoring information)				
Site No.	Site Name/ location	Site Area (Ha) (Capacity)	Brownfield/ Greenfield	Status as at 31 st Oct 2011
2010/044/FUL	Land At Winyates Way And Moons Moat Drive	0.64	G	Valid planning

				application
	Ravensbank	4.18	B	Valid planning applications ³
Total				0.64 Ha
Employment Land Review Sites (from 2010 update)				
Site No	Site Name/ location	Site Area (Ha) (Capacity)	Brownfield/ Greenfield	Status as at 31 st Oct 2011
-	Land at Brockhill East of Railway	3.5	G	Available
-	A435 Segment 2	10.44	G	Available
UCS 7.5	Land bound by Kingham Close and Far Moor Lane	0.19	G	Available
UCS 9.19	Land off Pipers Road	0.19	G	Available
UCS 9.58	Land Fronting Matchborough Way	0.60	G	Available
Total				14.92
New Employment Land Review Sites (from 2011 update)				
-	Edward Street	0.48	B	Available
Total				0.48
Total commitments as at December 2011				38.01

* This is subject to a live planning application which will never expire as it has been started

Numbering sites

The following sites will have the following names afforded to them for ease of reference:

Previous Site Reference	New Site Reference
2010/044/FUL	IN 80
Land at Brockhill East of Railway	IN 81
A435 Segment 2	IN 82
UCS 7.5 Land bound by Kingham Close and Far Moor Lane	IN 83
UCS 9.19 Land off Pipers Road	IN 84
UCS 9.58 Land Fronting Matchborough Way	IN 85
Land to the rear of the Alexandra Hospital Strategic Site (Inclusive of IN 69)	IN 86
Edward Street	IN 87

Step 9 – Translate employment forecasts to land requirements

As part of this update economic forecasts and projections have been combined with a number of economic scenarios to conclude with a predication on the future employment requirements for Redditch up to 2031. The

³ Following the implementation of these two outstanding applications there will be no capacity remaining at Ravensbank Business Park to meet any of Redditch's employment needs.

scenarios are detailed fully in the next section. One of the scenarios forecasts how much employment land would be needed should 7,000 homes be delivered. The study looks at three housing scenarios (7,000 houses, 4,000 houses and 3,300 houses). At this stage based on other emerging evidence (the Strategic Housing Land Availability Assessment) the highest housing scenario is the most appropriate to use with regard to the amount of housing that will be needed up to 2031. To compliment this housing growth this scenario concludes that 43.53 Hectares of employment land would be needed up to 2031.

In addition there are an additional 4 scenarios that have been run which model various economic scenarios including full trend model (1998 – 2008), no growth model, return to 2006 pre-recession model and full trend excluding recession model. The most appropriate economic scenario to use at this stage would be a return to 2006 pre-recession scenario. This scenario suggests that 49.51 Ha of employment land would be needed to 2031.

Therefore using these scenarios the total amount of land needed to accommodate employment and office accommodation up to 2031 is between 50.55 Ha and 52.70 Ha. Following this conclusion it is considered that an employment land target of 51 Ha is promoted (inclusive of office space) as would meet projected need based on the most logical scenarios presented.

Step 10 – Scenario testing

Forecasts of Future Employment Land Demand

This section details the forecasts of future employment land demand based on the scenarios and assumptions. Demand forecasts for each scenario have been presented, in terms of floorspace (sq.m) and land (ha) requirements.

Baseline Scenario

The total floorspace and land requirements under the Baseline Scenario are shown in Table 3.1 below. They show a requirement of around 8.74ha B1, 20.35ha B2 and 13.69ha B8, giving an overall requirement of around 43ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.1 – Baseline Scenario – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	1,092	3,466	8,917	16,207	23,830
B2	0	49,385	54,163	53,843	50,035	57,970
B8	0	4,779	12,744	20,709	28,674	40,443
Total	0	55,256	70,374	83,469	94,916	122,243

Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	0.40	1.27	3.27	5.94	8.74
B2	0.00	17.45	19.06	18.96	17.67	20.35
B8	0.00	1.62	4.31	7.01	9.71	13.69
Total	0.00	19.47	24.65	29.24	33.31	42.78

Source: GVA analysis, 2011

Scenario 1 – 7,000 New Homes

The total floorspace and land requirements under Scenario 1 (7,000 new homes) are shown in Table 3.2 below. They show a requirement of around 14ha B1, 20.35ha B2 and 16.46ha B8, giving an overall requirement of around 51ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.2 – Scenario 1 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	3,937	10,829	18,313	26,940	38,169
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	6,211	16,651	27,201	37,865	48,643
Total	0	15,827	46,232	77,339	109,702	144,782

Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	1.44	3.97	6.71	9.88	14.00
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	2.10	5.64	9.21	12.82	16.46
Total	0.00	6.20	16.69	27.43	38.62	50.81

Source: GVA analysis, 2011

Scenario 2 – 4,000 New Homes

The total floorspace and land requirements under Scenario 2 (4,000 new homes) are shown in Table 3.3 below. They show a requirement of around 11.3ha B1, 20.35ha B2 and 13.41ha B8, giving an overall requirement of

around 458ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.3 – Scenario 2 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	3,119	8,561	14,476	21,408	30,807
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	5,082	13,610	22,210	30,883	39,626
Total	0	13,881	40,923	68,511	97,188	128,402
Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	1.14	3.14	5.31	7.85	11.30
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	1.72	4.61	7.52	10.45	13.41
Total	0.00	5.52	14.82	24.33	34.23	45.06

Source: GVA analysis, 2011

Scenario 3 – 3,200 New Homes

The total floorspace and land requirements under Scenario 3 (3,200 new homes) are shown in Table 3.4 below. They show a requirement of around 10.58ha B1, 20.35ha B2 and 12.6ha B8, giving an overall requirement of around 43.53ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.4 – Scenario 3 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	2,889	7,930	13,424	19,912	28,843
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	4,779	12,783	20,862	29,008	37,222
Total	0	13,348	39,465	66,110	93,817	124,035
Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	1.06	2.91	4.92	7.30	10.58
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	1.62	4.33	7.06	9.82	12.60
Total	0.00	5.33	14.31	23.49	33.05	43.53

Source: GVA analysis, 2011

Past Trends Scenario 1 (Full Trend 1998-2008)

The total floorspace and land requirements under Past Trends Scenario 1 (Full Trend 1998-2008) are shown in Table 3.5 below. They show a requirement of around 3.07ha B1, 20.35ha B2 and 12.4ha B8, giving an overall requirement of around 36ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.5 – Past Trends Scenario 1 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	1,092	2,912	4,732	6,552	8,372
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	4,779	12,744	20,709	28,674	36,639
Total	0	11,551	34,408	57,266	80,123	102,981

Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	0.40	1.07	1.74	2.40	3.07
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	1.62	4.31	7.01	9.71	12.40
Total	0.00	4.67	12.46	20.25	28.04	35.82

Source: GVA analysis, 2011

Past Trends Scenario 2 (No Growth)

The total floorspace and land requirements under Past Trends Scenario 2 (No Growth) are shown in Table 3.6 below. They show a requirement of around 3.11ha B1, 20.35ha B2 and 12.4ha B8, giving an overall requirement of around 36ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.6 – Past Trends Scenario 2 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	1,092	2,912	4,732	6,552	8,490
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	4,779	12,744	20,709	28,674	36,639
Total	0	11,551	34,408	57,266	80,123	103,099

Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	0.40	1.07	1.74	2.40	3.11
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	1.62	4.31	7.01	9.71	12.40
Total	0.00	4.67	12.46	20.25	28.04	35.87

Source: GVA analysis, 2011

Past Trends Scenario 3 (Return to 2006 Pre-recession Employment Total)

The total floorspace and land requirements under Past Trends Scenario 3 (Return to 2006 Pre-recession Employment Total) are shown in Table 3.7 below. They show a requirement of around 7.76ha B1, 20.35ha B2 and 21.4ha B8, giving an overall requirement of around 49.5ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.7 – Past Trends Scenario 3 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	1,682	4,826	8,593	13,545	21,160
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	5,891	17,193	30,426	45,713	63,217
Total	0	13,252	40,771	70,844	104,155	142,346
Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	0.62	1.77	3.15	4.97	7.76
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	1.99	5.82	10.30	15.47	21.40
Total	0.00	5.27	14.67	24.95	36.37	49.51

Source: GVA analysis, 2011

Past Trends Scenario 4 (Full Trend 1998-2006 excl Recession)

The total floorspace and land requirements under Past Trends Scenario 4 (Full Trend 1998-2006 excl Recession) are shown in Table 3.8 below. They show a requirement of around 11.23ha B1, 20.35ha B2 and 50.09ha B8, giving an overall requirement of around 82ha to 2031. This takes into account the impact of churn and leakage, and completions from 2008 to 2011.

Table 3.8 – Past Trends Scenario 4 – Floorspace and Land Requirements: 2008 to 2031

Use Class	Floorspace requirements from 2008 (sq m)					
	2008	2011	2016	2021	2026	2031
B1	0	2,567	7,388	13,113	20,347	30,615
B2	0	5,680	18,752	31,825	44,897	57,970
B8	0	11,351	34,110	63,001	100,048	147,997
Total	0	19,598	60,250	107,939	165,292	236,582
Use Class	Land requirements from 2008 (ha)					
	2008	2011	2016	2021	2026	2031
B1	0.00	0.94	2.71	4.81	7.46	11.23
B2	0.00	2.65	7.08	11.50	15.93	20.35
B8	0.00	3.84	11.54	21.32	33.86	50.09
Total	0.00	7.44	21.33	37.64	57.25	81.67

Source: GVA analysis, 2011

Stage 3 'Identifying a New Portfolio of Sites'

Step 11 – Devise qualitative site appraisal criteria

This is not required.

Step 12 – Confirm existing sites to be retained or released and define gaps in portfolio

This sites that contribute towards Redditch's Employment Land Portfolio can be found on Page 19. individual site appraisals for detailed site information can be found at Appendix A.

Step 13 – Identify additional sites to be brought forward

One additional site has been identified as part of this review this is – Edward Street (Town Centre), the site appraisal information for this site can be found at Appendix A.

Step 15 – Complete and present the employment review

The following table demonstrates the conclusions of the employment land review with regard to the amount of land that is required up to 2031 and how much land is available to meet this need (taking into account completions and existing commitments).

Summary

This Employment land Review Update presents the most up to date figure with regard to the amount of employment land required to meet Redditch's needs up to 2031. It also provides the locations for where some of this need can be met.

The following table presents a summary of this information.

In addition to the 51 ha required to meet the employment needs of Redditch up to 2031, in accordance with the emerging Worcestershire Waste Core Strategy consultants GVA have stated that an additional 6 Ha of land would be required to accommodate additional for waste facilities.

Redditch's Employment Land Requirements	Hectares
Amount of land required up to 2031	51
Land required for waste facilities	6
Total available employment land in the Borough (including completions and commitments from 2006)	(Completions 8.47) (Commitments 38.01) Total: 46.48
Deficit	46.48 - (51+6) = -10.52

It is clear from the summary table presented above there is a large land supply issue with regard to meeting employment needs in the Borough. 10.5 additional Hectares are required to meet the predicted need which cannot be accommodated within Borough boundaries. The need to meet projected demand far outweighs land supply. Therefore a significant amount of work is needed to ensure all employment needs are met up to 2031 and that the economic development of the Borough is not stunted due to an inadequate supply of available employment sites.

This ELR demonstrates the need for employment land up to 2031, however should this end date change this figure can be readily recalculated to any prescribed end date to align with housing figures.

This ELR Update was written in a period of change with regard to National Planning Policy, Regional Planning Policy and Local Planning Policy and therefore the findings are subject to change in line with changes to any tier of planning policy and subsequent recommendations. In particular national government have signalled their intention to revoke Regional Spatial Strategies and therefore remove the RSS target that is currently in place, therefore the next ELR Update must take this emerging change in policy into account.

Previous ELRs have considered the findings of the Borough Councils Office Needs Assessment, however it is currently not clear what the national requirements are for offices due to the consultation on the National Planning Policy Framework and the current findings of The Portas Review (December 2011). Therefore the requirements for offices in the Borough will need to be considered at the next review.

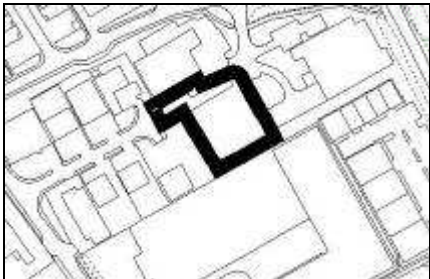

It is recommended that at the next review stage, due to emerging changes in Planning Policy, the Borough Councillors re-consider the priority sectors in light of these changes.

The next review must also consider the findings of the A435 review which is currently being conducted.



Appendix A



Detailed Site Appraisals for all sites which form Redditch's Employment Land Portfolio

IN 15 Woolaston Road, Park Farm (N)
IN 19 Studley Road, (Aeroquip), Park Farm (N)
IN 20 Old Forge Drive, (BACO), Park Farm (N)
IN 24 Windsor Road Gas Works, Enfield
IN 34 Merse Road, Moons Moat (N)
IN 37 Bartleet Road, Washford
IN 38 Adj. 47/52 Heming Road, Washford
IN 52 Shawbank Road, Lakeside
IN 54 Palmers Road, Moons Moat (E)
IN 58 Crossgate Road, Park Farm (N)
IN 59 Adj. Greenlands Business Centre, Studley Road, Park Farm (N)
IN 61 Studley Road/ Green Lane, Park Farm (S)
IN 67 Land at Brockhill
IN 73 Land at Union Street
IN 80 Land At Winyates Way and Moons Moat Drive
IN 81 Land at Brockhill, East of Railway
IN 82 A435 Segment 2
IN 83 Land bound by Kingham Close and Far Moor Lane
IN 84 Land off Pipers Road
IN 85 Land Fronting Matchborough Way
IN 86 Land to the rear of the Alexandra Hospital Strategic Site
IN 87 Edward Street

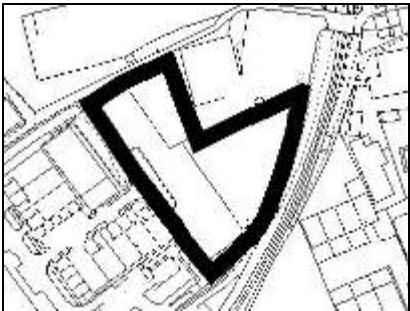

Site Ref: IN 15	Address: Woolaston Road, Park Farm North	Site Area: 0.40ha
	Development Control history: Numerous historic applications, most recent: 03/633 – Extension to Industrial Unit	
	Description of Site and suitable uses: Area of grassland in the middle of existing industrial units. Relatively flat site which is suitable for employment purposes and could provide an opportunity for an extension to the current industrial estate.	
	Adjacent land use/conflicts: Adjacent land use is industrial.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: The site has direct access onto highway off Old Forge Drive.	
	Level of car parking/public transport: Car parking can be provided on site. Site is within 400m of bus network.	
	Known constraints or infrastructure requirements (see site constraints checklist): Contaminated land: Requires Site Investigation.	
Current Site Status (including planning policy history): Greenfield site which is vacant.		Market appraisal/suitable type of Development: Considered to be suitable for B2 and B8 uses due to surrounding industrial uses.
Market Attractiveness Factors: <ul style="list-style-type: none"> • The site has been formally identified for employment use for at least 10 years. • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed as an employment site. • The site is not owned by a developer or another agency known to undertake employment development. 		Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of surrounding uses. Due to surrounding industrial uses B2 or B8 development are the most suitable.

- | | |
|--|--|
| <ul style="list-style-type: none">• The site is owned by a single organisation that is unlikely to bring it forward for standalone development. The site is likely to be retained for expansion room.• There is no valid permission for employment development on the site. | |
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Site Ref: IN 19	Address: Studley Road (Aeroquip), Park Farm (N)	Site Area: 1.44ha
	Development Control history: Numerous historic planning applications, most recent: 98/266 – 250,000ft distribution centre with associated offices, car parking and landscaping. This site still has planning permission which has not been fully completed.	
	Description of Site and suitable uses: Relatively flat site, suitable for employment purposes. The site is adjacent to industrial development and residential development.	
	Adjacent land use/conflicts: Adjacent to other industrial units and Arrow Valley Park. Some residential in close proximity.	
	Floor space in use/vacant: Site is in use by Pilkington.	
	Ownership: - Strategic access: Site has direct access onto highway network off Old Forge Drive. Level of car parking/public transport: Car parking has been provided; site is within 400m of a bus route. Known constraints or infrastructure requirements (see site constraints checklist): No known constraints.	
	Current Site Status (including planning policy history): Industrial warehouse, completed site in use by Pilkington.	
	Market appraisal/suitable type of Development: Considered to be suitable for B2 or B8 uses. Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses.	
Market Attractiveness Factors: <ul style="list-style-type: none"> There is a valid permission for employment development on the site. 		

Site Ref: IN 20	Address: Old Forge Drive, (BACO) Park Farm North	Site Area: 1.32ha
	Development Control history: No history.	
	Description of Site and suitable uses: Flat wild scrubland. B2 and B8 employment uses would be suitable.	
	Adjacent land use/conflicts: This site is adjacent to a vacant industrial unit which could be utilised for employment purposes. Site is also adjacent to Arrow Valley Park.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Located off Old Forge Drive with good strategic access off A4189.	
	Level of car parking/public transport: Car parking could be provided; site is located 400m away from bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): Site is located in Flood zone 2 and 3a. 3 (Broad ground ditch runs through site). New Town TPO No.24. Land affected by significant contamination. Biodiversity: If progressed comments should be sought from the Councils Biodiversity Officer as the site may require some mitigation measures.	
	Current Site Status (including planning policy history): Greenfield,	
		Market appraisal/suitable type of Development:

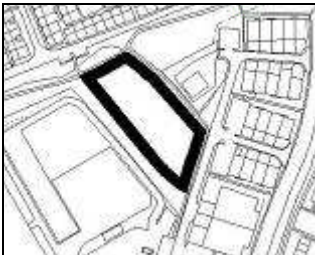

designated employment site.	Considered to be suitable for B2 and B8 uses.
Market Attractiveness Factors <ul style="list-style-type: none"> • The site has been formally identified for employment use for at least 10 years. • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed as an employment site. • The site is not owned by a developer or another agency known to undertake employment development. • The site is in single ownership by an organisation unlikely to bring it forward for development. • There is not a valid permission for employment development on the site. 	Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses. Due to adjoining use B2 and B8 are considered to be the most suitable employment uses.

Site Ref: IN 24	Address: Windsor Road Gas Works, Enfield	Site Area: 0.90 ha
	Development Control history: 02/004 – o/l res. development 06/484 – Reserved Matters – 146 units with associated infrastructure, parking and landscaping 06/541 – Reserved Matters for 109 residential units, associated infrastructure and landscaping	
	Description of Site and suitable uses: The site is slightly undulating. Considered to be suitable for B1 and B2 uses.	
	Adjacent land use/conflicts? Adjacent to other industrial units. The site is also adjacent to residential development.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: The site has access onto strategic highway (A441) off Windsor Road (B4184).	
	Level of car parking/public transport: Car parking could be provided on site; site is within 400m of a bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): Contaminated land: Requires Site Investigation.	
Current Site Status (including planning policy history): Currently undeveloped brownfield site, designated for employment use. The site is currently being used to store waste and for parking for adjacent sites.		Market appraisal/suitable type of Development: Considered to be suitable for B1 and B2 uses.
Market Attractiveness Factors: <ul style="list-style-type: none"> The site has been formally identified for employment use for at least 10 years. There has been no development activity on the site in the last 		Sustainable Development Factors: The site is considered to be a sustainable location for B1 or B2 employment uses.



<p>5 years.</p> <ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • The site is owned by an agency known to undertake employment development. • The site is in single ownership by an organisation unlikely to bring it forward for employment development. • There is no valid permission for employment development on the site. 	
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Site Ref: IN34	Address: Merse Road, Moons Moat North	Site Area: 0.65ha
	Development Control history: N/A	
	Description of Site and suitable uses: Greenfield site, flat, forms extension to Industrial Estate.	
	Adjacent land use/conflicts? Adjacent to other employment uses (industrial). The site also includes a car park which is use by an adjacent site but it is underutilised, there may be the potential to utilise this land to form a larger employment opportunity.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Accessed of the A4023, Moons Moat Drive, Merse Road secondary access could be taken from Colemeadow Road which is wider and avoids parking issues on Merse Road.	
	Level of car parking/public transport: Car parking can be provided at this location, the site is within 400m of a bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): New Town TPO No.8. Contaminated land – Requires site investigation	
Current Site Status (including planning policy history): Greenfield site with any Planning Permission that has been granted now expired.		Market appraisal/suitable type of Development: Suitable for B1, B2 and B8 uses.
Market Attractiveness Factors: <ul style="list-style-type: none"> The site has been formally identified for employment for at least 10 years. Planning application 06/385 was approved on 14/9/06 for partial development of the site (approx. 1/3 rd). The site is not being actively marketed as an employment site. The site is not owned by a developer or other agency known to 		Sustainable Development Factors: Employment is the only acceptable form of built development for this site because of adjoining uses.

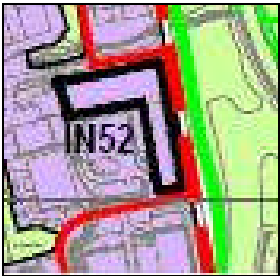

<p>undertake employment development.</p> <ul style="list-style-type: none"> • The site is in multiple ownership. • There is a valid planning permission covering approx. 1/3 rd of the site. 	
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Site Ref: IN 37	Address: Bartleet Road, Washford	Site Area: 0.62ha
	Development Control history: No history.	
	Description of Site and suitable uses: Greenfield, flat site considered to be suitable for B1 and B8 uses.	
	Adjacent land use/conflicts? Adjacent to industrial employment uses. The site is also adjacent to residential development.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Access off A435, Bartleet Road - good strategic access.	
	Level of car parking/public transport: Car parking could be incorporated; site is within 400m of a bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): Warwick TPO No.6. <i>Contaminated land:</i> Requires Site Investigation.	
Current Site Status (including planning policy history): Undeveloped. Allocated for employment use.		Market appraisal/suitable type of Development: Considered to be suitable for B2 and B8 uses.
Market Attractiveness Factors: <ul style="list-style-type: none"> • The site has been formally identified for employment use for at least 10 years. • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed as an employment site. • The site is not owned by a developer or other agency known to undertake employment development. • The site is in single ownership by an organisation unlikely to 		Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses.



bring it forward for development. <ul style="list-style-type: none"> • There is no valid permission for employment development on the site. 	
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Site Ref: IN 38		Address: Adj. 47/ 52 Heming Road, Washford		Site Area: 0.22ha	
				Development Control history: 90/320 – C.O.U. from warehouse to light industrial 91/208 – Development of B2 and B8 purposes 91/417 – Development for B1 purpose	
				Description of Site and suitable uses: Small site, relatively flat, suitable for small employment use, but not offices (B1). The site is occupied by electricity substation on the lower portions of the site	
				Adjacent land use/conflicts? Adjacent to industrial units. Although some residential in surroundings, which is buffered by tree planting.	
				Floor space in use/vacant: N/A	
				Ownership: -	
				Strategic access: Accessed off A435, Claybrook Drive, Heming Road.	
				Level of car parking/public transport: Car parking could be provided; site is in close proximity to bus route.	
				Known constraints or infrastructure requirements (see site constraints checklist): Access is a slight issue in area, as there are a number of HGVs which park on main road, therefore potential access capacity is an issue. This would need further consideration before the site is developed.	
				Warwick TPO No.5. Contaminated land: Requires Site Investigation.	
Current Site Status (including planning policy history): Undeveloped, no planning permission.				Market appraisal/suitable type of Development: Considered to be suitable for B2 and B8 uses, but not offices (B1).	
Market Attractiveness Factors: <ul style="list-style-type: none">The site has been formally identified for employment use for at least 10 years.There has been no development activity on the site within the				Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses.	

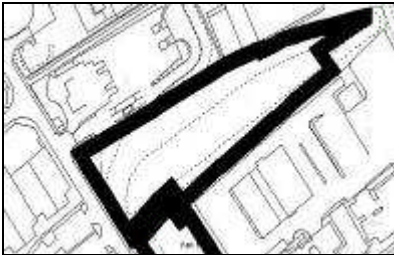

<p>last 5 years.</p> <ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • The site is owned by a property company who may undertake employment development. • The site is in single ownership by an organisation who may bring it forward for development. • There is no valid permission for employment development on the site. 	
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Site Ref: IN 52	Address: Shawbank Road, Lakeside	Site Area: 1.03 Ha
	Development Control history: N/A	
	Description of Site and suitable uses: Site is relatively flat, with some trees adjacent to site; and in an ideal location for employment use. Site is also opposite Arrow Valley Park.	
	Adjacent land use/conflicts: Adjacent to employment uses (industrial)	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Site has direct access onto highway network (A4129) via Holloway Drive, Shawbank road.	
	Level of car parking/public transport: Car parking could be provided on site, and site is situated close to a bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): No known constraints.	
Current Site Status (including planning policy history): Allocated employment site. Greenfield site.		Market appraisal/suitable type of Development: This site is considered to be a suitable employment site (B1, B2 or B8 uses).
Market Attractiveness Factors: <ul style="list-style-type: none"> The site has not been formally identified for employment use for at least 10 years. There has been no development activity on the site within the last 5 years. The site is not being actively marketed as an employment site. The site is not owned by a developer or other agency known to undertake employment development. The site is in single ownership by an organisation unlikely to 		Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses.



<p>bring it forward for development. The site is likely to be retained for expansion room.</p> <ul style="list-style-type: none"> • There is no valid permission for employment development on the site. 	
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Site Ref: IN 54	Address: Palmers Road, Moons Moat East.	Site Area: 0.29ha
	Development Control history: 86/414 – Proposed extension to existing factory and offices together with hospitality flat 87/370 – Factory and office extension also extension to existing factory and offices 98/511 – New factory (B2 use) (Expired)	
	Description of Site and suitable uses: Relatively flat site, triangular shape with stream running alongside. Considered to be suitable for employment purposes. Suitable for extensions to existing adjacent employment uses.	
	Adjacent land use/conflicts? Site is within industrial estate.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: The site could have direct access to the highway network subject to current estate road being extended to access the site.	
	Level of car parking/public transport: Car parking could be provided on site. Site is located on a bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): Site does not have road access; the estate road would need to be extended over a stream. New Town TPO No.7. Contaminated land: Requires Site Investigation.	
Current Site Status (including planning policy history): Allocated employment site (Greenfield).		Market appraisal/suitable type of Development: Considered to be suitable for B1, B2 and B8 uses.
Market Attractiveness Factors: <ul style="list-style-type: none"> The site has not been formally identified for employment use for at least 10 years. There has been no development activity on the site within the 		Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses.



<p>last 5 years.</p> <ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • The site is not owned by a developer or other agency known to undertake employment development. • The site is in single ownership by an organisation unlikely to bring it forward for development. • There is no valid permission for employment development on the site. 	
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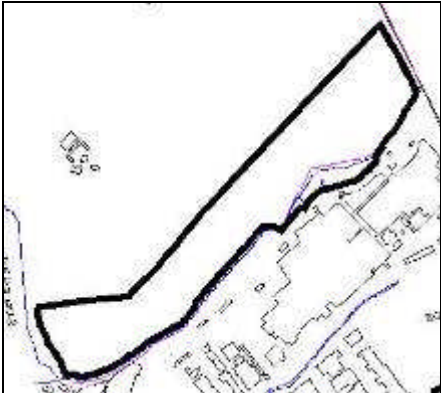

Site Ref: IN 58	Address: Crossgate Road, Park Farm North	Site Area: 1.10ha
		Development Control history: N/A Description of Site and suitable uses: Overgrown with shrubbery, slightly sloping. Considered to be suitable for employment purposes. Adjacent land use/conflicts: Adjacent to other employment uses. Floor space in use/vacant: N/A
		Ownership: - Strategic access: Site has direct access onto road network via Crossgate Road. Level of car parking/public transport: Car parking can be provided on site and site is within 800m of bus interchange. Known constraints or infrastructure requirements (see site constraints checklist): Slight differing topography. New Town TPO No.19. Partially in Flood Zone 2. Contaminated land: Requires Site Investigation.
Current Site Status (including planning policy history): Greenfield site with no planning permission.		Market appraisal/suitable type of Development: Considered to be suitable for B2 and B8 uses, but not B1 (due to surrounding uses).
Market Attractiveness Factors: <ul style="list-style-type: none"> The site has not been formally identified for employment use for at least 10 years. There has been no development activity on the site within the last 5 years. 		Sustainable Development Factors: Employment is the only acceptable form of built development on this site because of adjoining uses.

<ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • The site is not owned by a developer or other agency known to undertake employment development. • The site is in single ownership by an organisation unlikely to bring it forward for development. • There is no valid permission for employment development on the site. 	
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Site Ref: IN59	Address: Adj. Greenlands Business Centre, Studley Road, Park Farm North	Site Area: 0.38ha
	Development Control history: 2001/293: Two Storey Office Development (Expired)	
	Description of Site and suitable uses: Flat site, adjacent to existing business centre and residential development. Site is considered suitable for employment purposes.	
	Adjacent land use/conflicts: Employment and residential units surround the site.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Site has direct access onto highway network. There is potential access from Greenlands	
	Level of car parking/public transport: Car parking can be provided on site. The site is also adjacent to bus network. Potentially access to the site could be incorporated to the rear of the site.	
	Known constraints or infrastructure requirements (see site constraints checklist): Vehicles accessing the site will need to consider surrounding built up area. This may affect the form of employment development suitable for this site. Contaminated land: Requires site investigation. Development of this site must be sensitive to surrounding residential development.	
Current Site Status (including planning policy history): Granted		Market appraisal/suitable type of Development: B1 is the most


planning permission; no commencement (Greenfield site).	suitable use. There is also potential for the extension from existing unit.
Market Attractiveness Factors: <ul style="list-style-type: none"> • The site has not been formally identified for employment for at least 10 years. • The site is not currently being actively marketed as an employment site. The site was actively marketed from December 2000 – June 2006. • The site is not owned by a developer or other agency known to undertake employment development. • The site is in single ownership by an organisation who may bring it forward for development. 	Sustainable Development Factors: Employment is not the only acceptable form of built development on this site as it is adjacent to residential developments.

Site Ref: IN 61	Address: Studley Road/ Green Lane, Park Farm South	Site Area: 0.43 Ha
	Development Control history: 03/159 – Erection of class B2/B8 industrial/storage units and access road 05/012 – B1 units, associated car parking and access road 06/397 – B1 units, car parking and access road	
	Description of Site and suitable uses: Field containing derelict agricultural building.	
	Adjacent land use/conflicts: Industrial and agricultural land use is adjacent to site.	
	Floor space in use/vacant: N/A	
 	Ownership: -	
	Strategic access: Site has direct access to highway network via Studley road.	
	Level of car parking/public transport: Car parking can be incorporated. Site is within 800m of a bus interchange.	
	Known constraints or infrastructure requirements (see site constraints checklist): The site has a right of access to the remaining Greenfield land.	
Current Site Status (including planning policy history): Allocated employment site with valid planning permission, no construction underway. (Greenfield)		Market appraisal/suitable type of Development: Site is suitable for employment development.
Market Attractiveness Factors: <ul style="list-style-type: none"> The site is not currently being actively marketed as an employment site. 		Sustainable Development Factors: Site would be suitable for form of employment development.

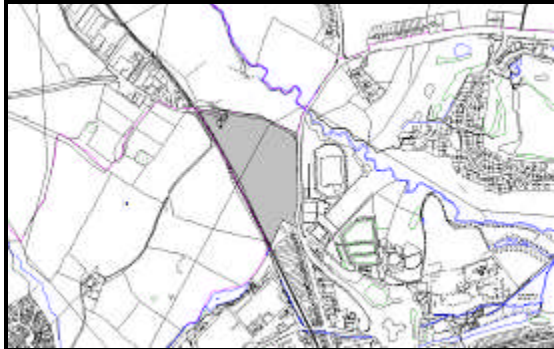
Site Ref: IN 67	Address: Land at Brockhill	Site Area: 6.60ha
	Development Control history: 2011/177: Mixed use development of 171 dwellings, public open space and outline application for 4,738 square metres of Class B1 (Business) floorspace and access	
	Description of Site and suitable uses: This site is Greenfield prominent gateway site designated for employment purposes. In particular due to its gateway location B1 office use is considered to be the most suitable type of employment use for this site. There is potential to for a landmark B1 building on this prominent location. The site is clearly visible from the railway entering into Redditch and therefore this gateway location should be maximised. The lower part of Batchley Brook forms part of the site and this must be a consideration ahead of any development on the site. There are slight topographical differences on site which must also be considered.	
	Adjacent land use/conflicts? Potential housing site on adjacent Area of Development Restraint (ADR) land; other employment uses adjacent and housing. In the development of this site there would need to be a buffer around the site.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: The site currently has the potential for good strategic access as part of the wider site development; which could be worked in to any potential scheme. This site has good access from public transport walking and cycling (Transport Assessment, 2011). The site is in close proximity to the A441.	
	Level of car parking/public transport: Car parking can be provided, and the site is within a bus network.	
Known constraints or infrastructure requirements (see site constraints checklist): Contaminated land: Requires Site Investigation.		


	<p>Biodiversity: If progressed comments should be sought from the Councils Biodiversity Officer as the site may require some mitigation measures.</p> <p>Constraint of the Batchley Brook.</p>
<p>Current Site Status (including planning policy history): Planning permission approved in 2011 for employment development on this site.</p>	<p>Market appraisal/suitable type of Development: Considered to be suitable for B1 uses, may be suitable for other uses which must be compatible with potential adjacent residential uses.</p>
<p>Market Attractiveness Factors:</p> <ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • The site is not owned by a developer or agency known to undertake employment development. • The site is in multiple ownership. • There is valid permission for part of the employment development on the site. • The site has potential for good strategic access onto the road network. 	<p>Sustainable Development Factors: Employment is considered to be the most sustainable use of this site, in particular B1 employment development.</p>

Site Ref: IN 73		Address: Land at Union Street	Site Area: 0.19 Ha
		Development Control history: 83/159 – Temporary renewal storage of cars 99/210 – DIY warehouse	
		Description of Site and suitable uses: Site is slightly sloping. Could form extension to existing industrial units located at IN 42.	
		Adjacent land use/conflicts: Site is located adjacent to existing industrial units (IN 42) and a residential area.	
		Floor space in use/vacant: N/A	
		Ownership: -	
		Strategic access: Current access to be taken via surrounding residential roads however, access to the highway network would be possible via existing IN 42	
		Level of car parking/public transport: Car parking could be provided on site; the site is well served by bus and rail transport.	
		Known constraints or infrastructure requirements (see site constraints checklist): Due to lack of direct strategic access all access must be taken from local residential roads, this would restrict the type of use on the site. Should access be amended to be taken via IN42 this would increase opportunities of the type of development suitable on this site.	
Current Site Status (including planning policy history): Non-implemented employment site (Greenfield).		Market appraisal/suitable type of Development: B1 is considered to be the most suitable employment use due to close proximity to residential properties and current lack of strategic access.	
Market Attractiveness Factors: <ul style="list-style-type: none"> The site has not been formally identified for employment use for at least 10 years. Part of the site is being actively marketed. The ownership of the site is unknown. 		Sustainable Development Factors: The site is situated between a residential development and an industrial area. Due to close proximity to residential properties B1 development would be preferable.	



Site Ref: IN 80	Address: Land At Winyates Way And Moons Moat Drive	Site Area: 0.64
	<p>Development Control history: The site is subject to a live planning application: 2010/044/FUL: Erection of three general industrial units (B2) with associated offices, car parking and service yard</p>	<p>Description of Site and suitable uses: The site is located within Moons Moat which is a predominately industrial area and is surrounded by industrial land. The site is bound to the North by Winyates Way and to the South by Moons Moat Road, which runs parallel to the A4023, Coventry Highway.</p> <p>Due to its located and surrounding uses, should the current application expire this site will be retained for employment uses only.</p>
	<p>Adjacent land use/conflicts: The site is mainly surrounded by employment land. There is some open space located to the west of the site.</p>	<p>Floor space in use/vacant: N/A</p>
	<p>Ownership: -</p>	<p>Strategic access: As part of the current planning application, access is proposed from the north eastern boundary along Winyates Way. The site is in very close proximity to access the highway network.</p>
	<p>Level of car parking/public transport: The site is located within easy access (200m) of the 57 and 58 bus routes.</p> <p>Car parking can be provided on site.</p>	<p>Known constraints or infrastructure requirements: No known constraints or significant infrastructure requirements associated with the development of this site.</p>
<p>Current Site Status (including planning policy history): The site is not designated in Local Plan No.3 and is currently vacant</p>		<p>Market appraisal/suitable type of Development: This site is ideally located for employment uses. The live planning</p>

and overgrown.	application proposes B2 employment development which is a suitable use for this site.
Market Attractiveness Factors: This site is subject to a live planning application which proposes 0.64 Ha of B2 employment development.	Sustainable Development Factors: Due to local and surrounding uses, including the highway network this site is suitable for employment development.



Site Ref: IN 81	Address: Land at Brockhill, East of Railway	Site Area: 3.5 ha
	Development Control history: Current Planning Application 2011/270: for Residential development of up to 220 dwellings with associated open space and access arrangements – Outline application yet to be determined. Application for Bordesley bypass was approved but has now expired.	
	Description of Site and suitable uses: The site is Greenfield located on the edge of the Borough boundary. The site runs parallel to the Redditch – Birmingham train line to the east of the site and the A441 to the west of the site. The site is designated as a Area of Development Restraint and contains a road reserve (Local Plan No.3). The site is considered to be suitable for employment purposes. In particular due to its prominent gateway location, B1 is considered to be the most appropriate as an opportunity could be sought for a landmark building to form a strong gateway location into the Borough. It is considered that the employment development can be part of a mixed use opportunity only if the road reserve land is not required in its entirety.	
	Adjacent land use/conflicts: A number of uses surround this site including - residential units, agricultural land, an existing business park, the adjoining ADR, the Abbey Stadium, railway line (which has planned improvements) and Bromsgrove Green Belt to the north of the site.	
	Floor space in use/vacant: N/A	
	Ownership: - Strategic access: Accessed off the A441 Level of car parking/public transport: Can be provided on site, bus stop is located adjacent to site.	

	<p>Known constraints or infrastructure requirements: Weights Lane (which runs to the north of the site) is not suitable for a high level of traffic and therefore may need infrastructure improvements or an alternative access provided.</p> <p>Topography of site is a slight issue and would need to be considered in the development of the site. Site is a gateway site and therefore employment uses should be designed to reflect this.</p> <p>Contaminated land – Requires site investigation.</p> <p>The site is a key gateway location into the Borough and therefore there is potential to have a visual impact on the wider landscape, this must be carefully managed.</p> <p>Other constraints that must be considered in the development of this site include the location of gas pipeline, location of railway, location of septic tank and noise implications from development of the site.</p>
<p>Current Site Status (including planning policy history): Designated as an ADR – with a road reserve</p>	<p>Market appraisal/suitable type of Development: B1, B2 and B8 uses. However due to gateway location B1 use is preferable due to design opportunity. It is considered that the employment development can be part of a mixed use opportunity only if the road reserve land is not required in its entirety.</p>
<p>Market Attractiveness Factors:</p> <ul style="list-style-type: none"> • The site has been formally identified for employment use for at least 10 years. • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed as an employment site. • The site is not owned by a developer or another agency known 	<p>Sustainable Development Factors: Employment is considered to be an acceptable form of built development on this site.</p>



<p>to undertake employment development.</p> <ul style="list-style-type: none"> • The site is owned by a single organisation that is unlikely to bring it forward for development. The site is likely to be retained for expansion room. • There is no valid permission for employment development on the site. 	
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Site Ref: IN 82	Address: A435 Segment 2	Site Area: 10.44ha
	Development Control history: N/A	
	Description of Site and suitable uses: Flat site, with predominantly planted rather than natural vegetation.	
	Adjacent land use/conflicts? Predominantly employment to the west, with some housing to the east (Mappleborough Green). The site is bounded by the A435 to the east and Claybrook Drive to the west. The site is bounded to the east and south by the Stratford-Upon-Avon Green Belt.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Adjacent to A435, and could be accessed off Claybrook Drive. The site has good access via public transport and cycling but would need improvements to walking accessibility should this site be developed (Transport Assessment, 2011)	
	Level of car parking/public transport: Car parking could be provided on site. Site is also adjacent to bus route.	
	Known constraints or infrastructure requirements (see site constraints checklist): Warwick New Town TPO. Contaminated land – Requires site investigation. Development of this site would require buffering of noise from adjacent employment uses.	
Current Site Status (including planning policy history): Area of Development Restraint		Market appraisal/suitable type of Development: Due to close proximity to residential development B1 development is considered to be the most suitable employment use. Landscaping and buffering would be required to screen development from adjacent properties.
Market Attractiveness Factors: <ul style="list-style-type: none"> There has been no development activity on the site within the 		Sustainable Development Factors: The site is considered to be suitable for employment development, in particular B1 development.



<p>last 5 years.</p> <ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • The site is not owned by a developer or another agency known to undertake employment development. • There is no valid permission for employment development on the site. 	
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Site Ref: IN 83	Address: Land bound by Kingham Close and Far Moor Lane	Site Area: 0.19
	Development Control history: No history	
	Description of Site and suitable uses: Flat site with foliage. Suitable for employment purposes.	
	Adjacent land use/conflicts? Residential development located to south. Offices (car sales) opposite. Adjacent to Ipsley Brook.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Access is an issue, accessed from residential area at present which is not suitable. Although site is located in close proximity to A4023 roundabout, if taken forward comments should be sought from Highways to ascertain suitable access to site.	
	Level of car parking/public transport: Could be provided on site.	
	Known constraints or infrastructure requirements (see site constraints checklist): Access. New Town TPO No.13. Biodiversity: If progressed comments should be sought from the Councils Biodiversity Officer as the site may require some mitigation measures.	
Current Site Status (including planning policy history): No current designation.		Market appraisal/suitable type of Development: Considered to be suitable for B1 office use due to close proximity to residential development.
Market Attractiveness Factors: <ul style="list-style-type: none"> There has been no development activity on the site within the last 5 years. 		Sustainable Development Factors: The site is considered suitable for employment development.

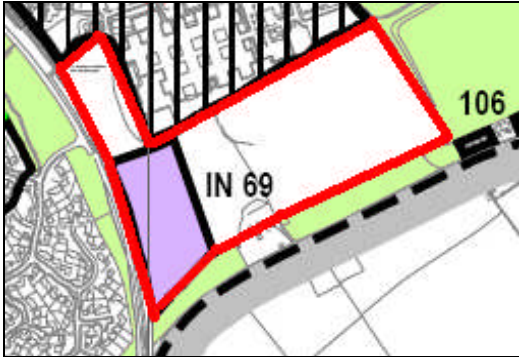

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| <ul style="list-style-type: none">• The site is not being actively marketed as an employment site.• The site is not owned by a developer or another agency known to undertake employment development.• There is no valid permission for employment development on the site. | |
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Site Ref: IN 84	Address: Land off Pipers Road	Site Area: 0.19ha (revised site size – just under half of site has been developed)
	Development Control history: 2008/081 – Resubmission – Extension to existing Warehouse and Associated External works (approved 24/04/2008) 2002/491 – Secure Covered Area for the storage of empty containers and cartons (approved 20/12/2002)	
	Description of Site and suitable uses: Slight gradient, maintained grass with some vegetation. Half of site has been developed. Remaining portion of site is considered suitable for employment purposes. Considered most suitable for extension to existing industrial space.	
	Adjacent land use/conflicts? Heavy industry	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Good strategic access, as site is in close proximity to A435, or A4189 via the B4497.	
	Level of car parking/public transport: Could be provided on site.	
	Known constraints or infrastructure requirements (see site constraints checklist): Car parking in area is poor and causes congestion. Site is slightly sloping, this would need to be considered in the development of the site. New Town TPO No.25. Contaminated land: Requires Site Investigation.	
Current Site Status (including planning policy history): Designated employment land.		Market appraisal/suitable type of Development: Half of the site has been developed, remaining half is considered to be suitable for B2 and B8 uses.



<p>Market Attractiveness Factors:</p> <ul style="list-style-type: none"> • The site is not being actively marketed as an employment site. • There is no valid permission for employment development on the site. 	<p>Sustainable Development Factors:</p> <p>The site is considered to be suitable for B2 or B8 employment development, in particular this site could be used to form an extension to existing, surrounding industrial premises.</p>
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Site Ref: IN 85	Address: Land Fronting Matchborough Way	Site Area: 0.60ha
	Development Control history: No relevant history	
	Description of Site and suitable uses: Flat site, covered in mature planted trees. Considered to be suitable for employment purposes.	
	Adjacent land use/conflicts? Industrial units.	
	Floor space in use/vacant: N/A	
	Ownership: -	
	Strategic access: Good access to site, located on B4497, which can be accessed directly from the A435 and A4189.	
	Level of car parking/public transport: Could be provided on site	
	Known constraints or infrastructure requirements (see site constraints checklist): Warwick TPO No.7. Falls within Flood Zone 2. Contaminated land: Requires Site Investigation. Biodiversity: If progressed comments should be sought from the Councils Biodiversity Officer as the site may require some mitigation measures. If this site is developed for B8 uses then the requirements for a turning circle should be considered.	
Current Site Status (including planning policy history): Designated as Primarily Open Space.		Market appraisal/suitable type of Development: Considered to be suitable for B1, B2 and B8 uses. In particular due to surrounding industrial units B2 or B8 employment development would be the most suitable.

<p>Market Attractiveness Factors:</p> <ul style="list-style-type: none"> • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed as an employment site. • There is no valid permission for employment development on the site. 	<p>Sustainable Development Factors:</p> <p>This site is considered suitable for employment development, in particular due to surrounding industrial uses B2 or B8 would be preferable.</p>
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Site Ref: IN 86	Address: Land to the Rear of the Alexandra Hospital Strategic Site	Site Area: 2 Ha
<div></div> <p>Purple Section: IN69 (designated employment site) Red Line Red Line: extent of strategic site</p>	<p>Development Control history: No relevant history</p> <p>Description of Site and suitable uses: Site is slightly sloping and is predominantly grassland; however this does not appear to be a major issue. Employment portion of the Strategic Site is considered suitable for B1 office use (in particular use which is complimentary to the adjoining hospital function), the remaining portion of the site is suitable for residential development.</p> <p>Adjacent land use/conflicts? Site is adjacent to residential uses, a major hospital and residential areas. It is also adjacent to Stratford-Upon-Avon Green Belt.</p> <p>Floor space in use/vacant: N/A</p>	
<div></div>	<p>Ownership: -</p> <p>Strategic access: Site has access to highway network (A441) via Woodrow Drive. This site has very good access from cycling and walking and excellent access from public transport (Transport Assessment, 201)</p> <p>Level of car parking/public transport: Could be provided on site. Car parking can be provided and the site is situated nearby the bus routes. Access from Nine Days Lane off Woodrow Drive.</p> <p>Known constraints or infrastructure requirements (see site constraints checklist): New Town TPO No.27. Biodiversity: If progressed comments should be sought from the Councils Biodiversity Officer as the site may require some mitigation measures.</p> <p>There are access issues that will need addressing on the site. The site has prominent landscape features and lies adjacent to a Site of Special Scientific Interest.</p>	

	Contaminated land: Requires Site Investigation.
Current Site Status (including planning policy history): IN 69 Forms part of wider strategic site. Part of site is Primarily Open Space Non-implemented site designated for employment land.	Market appraisal/suitable type of Development: The site is considered to be most suitable for office use (B1) in particular uses compatible and ancillary to adjacent hospital.
Market Attractiveness Factors: <ul style="list-style-type: none"> • The site has not been formally identified for employment use for at least 10 years. • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed. • The site is not owned by a developer or agency known to undertake employment development. • The site is in multiple ownership. • There is no valid permission for employment development on the site. 	Sustainable Development Factors: Employment is not the only acceptable form of built development on this site; it is considered employment development would be suitable on IN 69 with the remaining strategic site being suitable for residential development.

Site Ref: IN 87	Address: Edward Street	Site Area: 0.48ha
	Development Control history: 2010/288/DEM: Demolition Notification for Clive Works, Broxwood House and adjacent buildings.	
	Description of Site and suitable uses: Previous industrial site. Suitable for employment uses	
	Adjacent land use/conflicts? Site located adjacent to Redditch Train Station near to western fringe of the Town Centre. Bounded by railway station and car parking to the east, residential units on the opposite side to Bromsgrove Road to the south and modern industrial units to the west and north.	
	Floor space in use/vacant: Part of site is currently in use for employment purposes.	
	Ownership: -	
	Strategic access: Bromsgrove Road and Edward Street. Vehicular access to the site should be taken from the existing access off Edward Street. Located next to Train Station and Bus Station	
	Level of car parking/public transport: Located next to train station and bus station. Car parking potential depending on use of the site and type of development.	
	Known constraints or infrastructure requirements (see site constraints checklist): Adjacent land uses could be a constraint. Potential of contaminated land. Visual aspects from Railway Line could be a constraint as this site is a prominent visual gateway location, this is also an opportunity and should be maximised through good design. The topography of the area allows for important views of the site to be seen from a number of locations and therefore this prominent gateway location should be fully utilised and designed accordingly.	

<p>Current Site Status (including planning policy history): Site designated as a development site in Local Plan No.3 (Policy E(EMP).5 safeguarded for primarily employment use.</p> <p>Over 40 previous planning applications on site ranging from temporary buildings to signage.</p>	<p>Market appraisal/suitable type of Development: The site is allocated as a primarily employment site. Due to its gateway location the site is best suited to a B1 use.</p>
<p>Market Attractiveness Factors:</p> <ul style="list-style-type: none"> • There has been no development activity on the site within the last 5 years. • The site is not being actively marketed as an employment site. • There is no valid permission for employment development on the site. 	<p>Sustainable Development Factors:</p> <p>This site is in a very suitable location and should be utilised for employment uses, in particular B1 development would be the most appropriate.</p>