South West Regional Development Agency

Bournemouth Dorset Poole Workspace Strategy and Delivery Plan

October 2008

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South West Regional Development Agency

Bournemouth Dorset Poole Workspace Strategy and Delivery Plan

Final Report

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INTRODUCTION

The "Economic Strategy Action Plan for Bournemouth Dorset & Poole", produced in June 2008, aims to build a more competitive and sustainable economy for the sub-region. Although the economy has grown significantly in recent decades it is generally accepted that the sub-region is not as productive as it should be and is a relatively low wage economy. The aim therefore is to 'raise the game' through a 'quest for quality' in terms of the business environment and local employment that will deliver better economic performance and a better quality of life. It is recognised by all partners that ensuring economic success in the future requires deliverable employment sites to be identified now.

The importance of maintaining a flexible and responsive supply of employment land, sites and premises is clearly established in the Regional Economic Strategy (RES). A specific activity of the Delivery Framework accompanying the RES is to: 'deliver sustainable sites and premises for business growth'.

The South West Regional Development Agency (South West RDA), in cooperation with Dorset County Council, Bournemouth, Christchurch, East Dorset, North Dorset, Poole, Purbeck, West Dorset and Weymouth & Portland district / unitary authorities in the sub-region, has commissioned GVA Grimley Ltd to review and update the 2003 Workspace Strategy.

The Strategy seeks to ensure that there is a delivery of sufficient, appropriate employment land and quality of employment premises to meet business requirements and ensure the sustainable growth of the sub-regional economy.

The document is structured in two parts:

- The **Strategy** provides a baseline review and assessment of the sub-region and establishes demand and supply patterns. It ends with nine strategic recommendations.
- The **Delivery Plan** identifies in general terms possible interventions to improve the employment land supply situation in the sub-region and assesses key sites and makes site specific recommendations (in the Appendix to the Delivery Plan).

PLANNING POLICY

There is a clear support on national, regional and local level for an adequate supply of employment land to allow sustainable communities and reduce commuting. With regards to employment land the Panel Report of the Examination in Public of the Regional Spatial Strategy recommends an employment land supply of 110 ha in the Bournemouth and Poole Travel to Work Area. The proposed modifications by the Secretary of State have increased this figure to 152 ha of employment land supply in line with the regional employment land study provided by South West RDA. We are aware however that the Dorset County Council (DCC) response to the Modifications is questioning this figure as it appears to be based on DTZ work. DCC representations suggest that the Workspace Strategy projection should replace this figure.

However, there is also a strong competition for land, especially from housing, which also enjoys policy support although there is no explicit policy guidance which supports redevelopment of employment sites for housing.

The draft PPS4 Sustainable Economic Development places greater emphasis on the role that economic development should play in the plan making process. PPS4 also encourages the adoption of a greater level of flexibility for employment allocations made through the plan process, encouraging less restrictive policies when making Use Class designations.

On a district level the employment land protection policies are central to the successful protection of existing employment land. The employment land protection policies vary significantly across districts within the sub-region.

COMMERCIAL PROPERTY MARKET REVIEW

The property market within the BDP study area comprises a number of distinct sub areas including an office centre in Bournemouth and industrial market in Poole with notable supporting roles from the significant industrial estates at the Airport, Ferndown and Holton Heath. The area of Weymouth, Portland and Dorchester also comprises its own property market serving the needs of its catchment. The more rural parts of the County comprise largely of sites meeting their local property market requirements although sites such as Winfrith could provide for businesses over and above their local catchment.

Key findings from agents indicate a deliverability problem with offices in Bournemouth in light of depressed rental values, and a real concern of the perception of sub-region’s infrastructure from inward investors particularly when compared to the likes of Southampton and Portsmouth.

There appears to be a reasonable level of availability across the Districts with agents and the Property Pilot also reporting steady increase in B8 enquiries and recent slight increase in B2 space enquires. However, whilst there is considered to be a reasonable supply of land, agents report that it is not readily available, and there is a perceived shortage from agents of large sites capable of accommodating large inward investment enquires or major local expansions. In terms of tenure, agents also indicate that traditionally demand has predominantly been for freehold premises however this is now reverting to leasehold in light of difficulties in obtaining finance. The general consensus is also one of high levels of occupancy within existing industrial estates across the study area.

SOCIO-ECONOMIC CONTEXT

Overall the sub-region compares relatively well in labour market terms with regional and national averages:

- The sub-region has a lower proportion of working age residents (20 to 64 age group) than the Region as a whole.
- Economic activity levels in the sub-regions are in line with the national and regional average.
- Unemployment rate in the sub-region is slightly above the regional average but well below the national level.
- Occupational and skills levels in the sub-region are in line with the regional average. The skills levels in the sub-region and the Region compare positively to the national average.

However, the performance within the sub-region across the different labour market indicators is quite varied. Only North Dorset performs above average in all four selected labour market indicators (working age population growth, economic activity rate, higher level occupation and skills). West Dorset over performs the sub-regional average in two of the four labour market indicators. East Dorset and Weymouth & Portland perform in two of the four indicators below the sub-regional average. The remaining local authorities (Bournemouth, Christchurch, Poole and Purbeck) perform similar to the sub-regional average with one indicator being above and/or below the sub-regional average.

Overall the sub-region has a well balanced sector distribution. Whilst there are still significant manufacturing and employment strengths ,the economy in the sub-region has successfully transformed into a service economy to offset the decline in employment in the Manufacturing and the Primary & Utilities sectors and an increase in Health & Education, Financial & Business Services and Distribution & Retail between 1981 and 2006. This trend is projected to continue to 2026.

A significant part of the projected employment growth will not require B-Use-Class land as it comes from sectors such as Health & Education and Retail and Hotel & Catering. The loss of manufacturing employment will reduce the demand for B-Use-Class land. We do however note the findings of the Nathaniel Lichfield & Partners Bournemouth Airport study (March 2008) which noted a high existing demand for industrial premises (B1c, B2) within areas such as Poole, Ferndown, Ringwood and Bournemouth Airport.

The employment projections presented in this chapter will be translated into employment land demand in the following chapter as one of the factors influencing future employment land demand.

EMPLOYMENT LAND DEMAND

Overall we estimate that there is a gross demand of around 184 ha of employment land between 2006 and 2026 in the sub-region which is almost evenly split between land demand for office uses (94 ha) and for industrial uses (90 ha). The overall demand is mainly driven by demand for office uses and for warehousing. Traditional industrial employment is projected to decline, leaving a demand for renewal and replacement of existing industrial employment sites where these are no longer fit for purpose.

Office demand is focussed on the Bournemouth and the Poole TTWAs (37ha and 32 ha respectively); industrial demand is spread more evenly across the sub-region.

As part of the analysis we have considered a number of scenarios. We do not envisage that any of these scenarios significantly increase the overall demand for employment land in the sub-region. The macroeconomic forecast the demand analysis is based on assumes a 3.2% GVA growth rate pa. We regard the different demand scenarios as options to achieve the growth aspirations of 3.2% GVA pa and not actually increasing the overall employment land demand.

The demand scenarios have therefore less an impact on the quantitative aspects of the projected employment land demand and more on the qualitative aspect. In summary the qualitative employment land demand requirements following from the demand scenarios are as follows:

- **Marine Sector:** Requirements for waterside industrial units, foster clustering of marine industries (e.g. at Osprey Quay)
- **Finance & Business Services:** Requirements for high quality town centre office premises predominately in Bournemouth and Poole
- **Aviation for Christchurch & East Dorset**: Safeguard some employment land for aviation industry with access to the runway at Bournemouth Airport where there is a requirement to safeguard some airside land for companies that specifically require airside access. The fostering of a cluster of sectors is also explored (e.g. at the Airport where the NLP assessment of sector opportunities identifies general manufacturing, advanced engineering, financial / business services, ICT and distribution / logistics for the airport).
- **Diversification for West Dorset:** Requirements for good quality affordable office accommodation within the Dorchester & Weymouth TTWA
- **Medi-Park at Poole:** Flexible approach to employment land designation to allow a Medi-Park type development if and when the demand for one arises
- **Change in working practice:** Provide planning policies to enable greater remote working

EMPLOYMENT LAND SUPPLY

Based on the Employment Land Reviews of the local authorities and our assessment of a selection of key sites we have identified a total supply of 216 ha of employment land within the sub-region. Of this supply 74 ha is perceived to be available in the short term, 89 ha in the medium term and 53 ha in the long term.

Of the total supply 50 ha is within 4 sites over 10 ha each. A further 121 ha is within 27 large sites (2 – 10 ha).

Based on information from Dorset County Council we have estimated that around 15 ha of employment land at Bournemouth Airport could come forward subject to local road improvements. A study has been commissioned by the Airport to determine the quantum of land that could be delivered subject to local road improvements only, the findings are still awaited. Previously we have been informed that a further 43 ha could be developed subject to a link road being built however there does not appear to be a means of evidence to back this up at this stage. Therefore Christchurch Borough Council is seeking to commission further work by Peter Brett Associates to determine the upper limits of land that come forward with specific infrastructure improvements. Due to the uncertainties regarding the likelihood of a new link road being built we have, for the Workspace Strategy, assumed that 15 ha of employment land at the Airport will come forward in the long term (5+ years).

Plans for the development at Winfrith are being developed as the research for the Workspace Strategy was undertaken. On the basis of the information available at this stage we estimate that there could be around 20 ha of employment land coming forward at Winfrith. As discussed earlier, we do not assume that all of this will serve a local employment market. We have, therefore, assumed for the Workspace strategy that 5 ha of employment land at Winfrith will be serving a local employment market and will come forward in the medium term (2-5 years).

BALANCING DEMAND AND SUPPLY

Supply and demand are unevenly spread across the sub-region.

In the Bournemouth TTWA there is an overall undersupply of employment land. A shortage of good quality available land for office use is a significant issue for the Bournemouth TTWA.

In the Dorchester & Weymouth TTWA there is a very tight supply of employment land. Within this TTWA there is a specifically tight supply in Weymouth & Portland especially when considering the specific offer that Osprey Quay and Winfrith present.

The Poole TTWA has overall an adequate supply of employment land. However, the Poole TTWA suffers of a significant (13 ha) shortfall of employment land in the short term, of which important amounts are for office use.

Rural Dorset has an adequate supply of available employment land. However, the area faces challenges regarding the delivery of employment premises due to the local market conditions and the somewhat remote location of many of the employment sites.

A significant part of the employment land supply in the sub-region is afflicted with uncertainties regarding the likelihood of these sites coming forward. If large parts of the assumed supply do not come forward, this will leave the sub-region with a supply shortage most likely having a negative affect on the performance of the local economy.

RECOMMENDATIONS

A set of recommendations is given as part of the Strategy Section of this document. These recommendations are of general nature and are largely picked up again on a site level in the Delivery Plan in Section B.

- **Recommendation A: Employment Land Policies**
  Planning documents should identify all regionally and locally important employment sites and include appropriate employment land protection policies and define where mixed use packages could be appropriate to ensure delivery .
- **Recommendation B: Balancing Demand and Supply through Adequate Supply of Sites and Premises**
  For this purpose the local planning authorities should work across borders to provide a balanced of supply and demand within functional economic areas (e.g. TTWAs).
- **Recommendation C: Interventions to Secure Adequate Supply of Sites and Premises**
  A range of interventions is required to help to bring the required supply (including more smaller sites) forward. Priority should be given to the delivery of key sites with little constraints, site level intervention where the market alone will not deliver the required employment sites and sub-regional interventions to increase the attractiveness of the area as a place to do business.
- **Recommendation D: Long Term Planning for Regional Infrastructure**
  There is a need to progress infrastructure requirements for economic development as well as housing growth. A more coordinated approach could make better use of existing and planned funding and delivery mechanisms such as Community Infrastructure Levy (CIL), Regional Infrastructure Fund (RIF) and Multi Area Agreement (MAA).

- **Recommendation E: Office**
  A focus should be given on the delivery of office premises in the sub-region, with a particular emphasis on provision at town centres in the conurbation and Dorchester:Weymouth.

- **Recommendation F: Urban Extensions**
  Within the proposed urban extensions support should be given to the inclusion of employment areas as part of properly masterplanned, mixed use schemes, although we acknowledge at this stage an employment element is not always proposed to be included within the extensions identified within the RSS.

- **Recommendation G: Town Centre Development**
  A priority should be the continued improvement in town centres. Attractive town centres increase overall market attractiveness of the sub-region and can help support office development and wider jobs growth.

- **Recommendation H: Whole Economy Approach**
  Local planning authorities need to recognise in their planning documents and in their approach to planning that a significant part of employment growth will come from Non-B employment or employment.

- **Recommendation I: Monitoring**
  Circumstances can always (and most likely will) change over the next 20 years. Ongoing monitoring of demand and supply is therefore critical.

1. INTRODUCTION

BACKGROUND

1.1 The "Economic Strategy Action Plan for Bournemouth Dorset & Poole", produced in June 2008, aims to build a more competitive and sustainable economy for the sub-region. The strategy is the economic background document for the Multi Area Agreement of the sub-region and builds on the earlier Economic Development Strategy "Raising the Game". The evidence base behind this work suggests that the economy has grown significantly in recent decades especially in the Bournemouth and Poole conurbation, with low unemployment and high economic activity rates. However, it is accepted that the sub-region is:

- not as productive as it should be;
- a relatively low wage economy.

1.2 The aim therefore is to 'raise the game' through a 'quest for quality' in terms of the business environment and local employment that will deliver better economic performance and a better quality of life. The Spatial Annex of the Regional Economic Strategy (RES) recognises prominently the importance of the Bournemouth and Poole conurbation and the Regional Development Agency's Corporate plan includes the conurbation as a 'Priority Place'.

1.3 The importance of maintaining a flexible and responsive supply of employment land, sites and premises is clearly established in the regional strategic framework. A specific activity of the Delivery Framework accompanying the RES is to: 'deliver sustainable sites and premises for business growth'. Confirmed activities include to:

- Deliver a suitable supply of employment land and business premises to meet the needs of new or growing businesses at the market rate and;
- Develop regional strategic sites to help meet the region's employment and housing needs.

1.4 The significance of the employment land supply issue was underlined by a recent regional employment land assessment[1]. This indicated that there will be an actual or potential shortfall in supply in each of the South West Region's largest urban areas over the next 10 to 20 years.

1.5 The previous Workspace Strategy for Bournemouth, Dorset and Poole was produced by the Bournemouth, Dorset and Poole Economic Partnership (BDPEP) in 2003. Through this work it became apparent that progress towards achieving provision of employment space based on

[1] DTZ (2007) 'The Demand and Supply of Employment Land, Sites and Premises in South West England'

local plan allocations varied considerably between Dorset districts, with Poole and East & North Dorset above their target figures, but other areas significantly below. An action plan was produced to identify and tackle barriers to market provision of workspace and partial progress has been made on the various actions recommended.

1.6 Employment Land Reviews are being undertaken at the District level to help address these issues. The Employment Land Reviews are well coordinated.

1.7 With the Districts Employment Land Reviews and LDF processes moving forward it has been considered appropriate and timely to review the 2003 Workspace Strategy.

THE BRIEF

1.8 The South West Regional Development Agency (South West RDA), in cooperation with Dorset County Council, Bournemouth, Christchurch, East Dorset, North Dorset, Poole, Purbeck, West Dorset and Weymouth & Portland district / unitary authorities in the sub-region , has commissioned GVA Grimley Ltd to review and update the 2003 Workspace Strategy.

1.9 The required Strategy seeks to ensure that there is a delivery of sufficient, appropriate employment land and quality of employment premises to meet business requirements and ensure the sustainable growth of the sub-regional economy. The brief requires the updated strategy to be predicated upon a robust, market facing assessment of the demand for and supply of employment land, sites and premises in the sub-region. The assessment is expected to form the basis for development of a robust strategy for the future provision of employment space within the sub-region.

1.10 The Workspace Strategy Document comprises two main elements:

1) **Strategy Document** aimed at building a clear strategic link between regional policy framework and local delivery documents. This is addressed in Section 'A – The Workspace Strategy' of this document.

2) **Delivery Plan** identifying clear priorities, listing employment sites and a range of delivery mechanisms to bring forward appropriate employment space covering geographical areas and sectors. This is addressed in Section 'B – The Delivery Plan' of this document.

RELATIONSHIP TO THE REGIONAL SPATIAL STRATEGY

1.11 The Draft Regional Spatial Strategy for the South West (RSS) identifies 21 Strategically Significant Cities and Towns (SSCTs) which include Bournemouth, Poole, Dorchester and Weymouth. It provides an indicative range of jobs which are likely to arise in the SSCTs.

1.12 The Panel Report issued in January 2008 into the Examination in Public of the RSS recommends a search for additional land to meet the target of 110 ha for employment development in the Bournemouth and Poole Travel to Work Area (TTWA). Neither the RSS nor the Panel Report gave a clear indication on the source for the required employment land demand. Furthermore, the cited demand for 110 ha by the Panel Report only applies to the Bournemouth and Poole TTWA and no indication of employment land demand for the rest of the Bournemouth, Dorset and Poole area is provided. However within the Secretary of State's Proposed Modifications (July 2008), a single Policy HMA7 (Bournemouth and Poole HMA) has been introduced to provide strategic growth policy for the sub-region including the South East Dorset SSCT. Through the new policy, the Modifications endorse the Panel Report recommendation for growth of about 45,400 jobs within the Bournemouth and Poole HMA, with 23,000 jobs in the Bournemouth TTWA and 19,000 jobs in the Poole TTWA. With regards to the supply of employment land the Modifications now recommend the provision of 152 hectares of employment land (including 20 hectares of employment land at Area of Search 7G to the west of Ferndown), rather than the search for 110 hectares as stated in the Panel Report. The 152 hectares is consistent with the DTZ and South West RDA regional assessment and comprises existing commitments and additional allocations within the Bournemouth and Poole TTWA rather than the conurbation. However, for developing their Local Development Frameworks (LDF) the local planning authorities require a robust evidence base for employment land demand on a local authority level.

1.13 The aim of the Workspace Strategy is to provide a robust evidence base for employment land demand for the whole of the Bournemouth, Dorset and Poole area on a TTWA and local authority level. This will allow a coordinated employment land policy approach across the Bournemouth, Dorset and Poole area as well as providing the local planning authorities with a robust evidence base for their LDF processes.

1.14 The Workspace Strategy is therefore an evidence base for the local planning authorities in developing their LDFs. It also gives some general advice on employment land policies based on the findings of the study, which might help the local planning authorities in developing their employment land policies in their LDFs.

METHODOLOGY

STUDY AREA

1.15 The sub-region includes Dorset County and the two unitary authorities Bournemouth and Poole. Dorset County contains the following six districts:

- Christchurch Borough
- East Dorset District
- North Dorset District
- Purbeck District
- West Dorset District
- Weymouth & Portland Borough

GEOGRAPHIES

1.16 To allow the Strategy to reflect the 'economic footprint' of the larger cities and towns within the sub-region as well as being meaningful to the planning policy system two geographical levels are used in the Strategy:

- the three major Travel to Work Areas (TTWA) Bournemouth, Poole and Dorchester & Weymouth within the sub-region to reflect the 'economic footprint' of the larger cities and towns[2]
- the individual districts and unitary authorities to be meaningful to the planning policy system.

1.17 Figure 1 shows the TTWAs and the local authority boundaries

Figure 1 – Workspace Strategy Geographies

Source: GVA Grimley, ONS, districts and unitary authorities

[2] ONS 2007 TTWA definitions. Within North Dorset there is also the Blandford/Shaftesbury TTWA which is a relatively localised TTWA and is treated within the Strategy as part of Rural Dorset. Rural Dorset is defined as the area of the sub-region which does not fall within any of the three mayor TTWAs and is shown as the gray area in Figure 1.

DEFINITION OF EMPLOYMENT LAND AND LAND USE TYPES

1.18 With regards to land uses, the Workspace Strategy focuses on employment land. Employment land in planning terms is defined as Office (B1a), Research and Development (B1b), Light Industry (B1c), General Industry (B2) and Warehouses (B8). To allow consistency between different data source we have grouped the B-Use-Classes in the following three land use types:

- Office (B1a/b)
- Other Business Space (B1c, B2)
- Warehousing (B8)

1.19 However, a significant part of current employment and projected employment growth is in sectors which to a large degree do not occupy B-Use-Class workspace[3]. In the Workspace Strategy employment in sectors which are predominantly not operating from B-Use-Class land types are referred to as Non-B-Use-Class employment.

1.20 Demand from Non-B-Use-Class employment is not translated into future land requirements as part of the Workspace Strategy. However, the Strategy does give some regard to the projected increase in Non-B-Use-Class employment and the possible spatial implication.

APPROACH

1.21 A collaborative approach between South West RDA, the County and Unitaries, the Districts and Boroughs and the consultants has been undertaken in developing this strategy. There were regular meetings with the core client group, two meetings with the Districts' Employment Land Review Group and individual meetings with all the local authorities.

1.22 The Property Market Review (Chapter 3) is based on a review and analysis of commercial property data, our extensive in-house knowledge of the property market in the sub-region and on consultation with local property agents.

1.23 The analysis of the Socio-Economic Context (Chapter 4) uses a range of data sources including the economic forecast for the South West Region based on a 3.2% p.a. GVA growth scenario provided by Cambridge Econometrics.

1.24 The Employment Land Demand Forecast (Chapter 5) is based on the 3.2% p.a. GVA growth scenario provided by Cambridge Econometrics. A detailed description of the forecasting approach is given in Chapter 5.

[3] E.g. retail, healthcare, education etc.

1.25 The employment land supply has been informed by the Districts' Stage 1 Employment Land Reviews, consultation with the districts planning officers and site visits of the key employment sites.

STRUCTURE OF THE REPORT

1.26 The remainder of this document is structured in two main sections:

- A – The Workspace Strategy
- B – The Delivery Plan

1.27 The Workspace Strategy builds a clear strategic link between the regional policy framework, specifically the Regional Spatial Strategy (RSS), the Regional Economic Strategy (RES) and Local Development Frameworks. The remainder of the Workspace Strategy is structured as follows:

- Chapter 2 gives the national, regional and sub-regional **policy context** and assesses the employment policies on a local authority level.
- Chapter 3 sets the **commercial property context** for the Strategy and provides the backdrop for the employment land demand forecast.
- Chapter 4 reviews the **socio-economic milieu** of the sub-region and helps to inform the employment land demand.
- Chapter 5 projects **employment land demand** up to 2026 by the main land use types.
- Chapter 6 gives an overview of the **current supply** of employment land within the sub-region.
- Chapter 7 **compares demand and supply** and identifies gaps in the supply in quantitative and qualitative terms. Chapter 8 provides a summary and recommendations.

1.28 The Delivery Plan identifies clear priorities, listing employment sites and a range of delivery mechanisms to bring forward appropriate employment space covering geographical areas and sectors. The Delivery Plan includes the following chapters:

- Chapter 9 introduces the Delivery Strategy and sets the context.
- Chapter 10 describes possible **intervention mechanisms** to help bring sites forward.
- Chapter 11 groups the key sites within the sub-region according to their main constraints and gives recommendations on possible intervention mechanisms.
- Chapter 12 provides an action plan to deliver the Workspace Strategy

South West Regional Development Agency

Bournemouth Dorset Poole Workspace Strategy and Delivery Plan

A – THE WORKSPACE STRATEGY

2. POLICY CONTEXT

2.1 The following section sets the planning policy context for the study by examining the national, regional and local policy requirements which will govern the provision of future economic development, and the protection of existing employment land and premises.

NATIONAL PLANNING POLICY AND GUIDANCE

2.2 **PPS1 Delivering Sustainable Development** sets out the Government's overarching vision for planning and the key policies and principles that underpin the planning system. The guidance promotes sustainable patterns of development, which protect the natural and historic environment and ensure high quality development through good design and the efficient use of land.

2.3 **Planning Policy Statement 3 Housing**, urges local planning authorities to consider "whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development" (para 44). Clearly such a review should not be undertaken without firm direction in terms of the needs of industry and economic development in the area.

2.4 **Planning Policy Guidance 4 Industrial, commercial development and small firms**, encourages planning authorities to "be realistic in their assessment of the needs of business." They should aim to ensure that there is sufficient land available which is readily capable of development and well served by infrastructure. They should also ensure that there are a variety of sites available to meet differing needs. A choice of suitable sites will "facilitate competition between developers; this will benefit end-users and stimulate economic activity" (Para 6). The guidance also recognises the important role the planning system plays in reconciling continued economic growth with environmental protection, a key issue for the BDP study area.

2.5 The guidance however will soon be replaced by **PPS4 Sustainable Economic Development** which has been published in draft to date and places greater emphasis on the role that economic development should play in the plan making process. The outdated PPG4 fails to take into account the impacts to the UK economy as a result of globalisation and the competitive knowledge based industry. The aims of sustainable economic growth are further promoted within the application determination process. This involves a requirement to assess applications against relevant market and other economic information, including land supply and the benefits of the development such as job creation, improved productivity and the wider benefits to the national, regional and local economy. The sustainability agenda is afforded further weight with a requirement for all economic development to address climate change by being sustainable in terms of accessibility, car parking provision and energy efficiency. PPS4 also encourages the adoption of a greater level of flexibility for employment allocations made through the plan process, encouraging less restrictive policies when making Use Class designations. There is also a focus on mixed use development, which at present stands aside from the traditional single use approach of employment land.

2.6 In connection with the production of PPS3, the DCLG commissioned a number of research studies investigating existing local authority approaches to the monitoring of employment land. It appears that the effective monitoring of employment land by local authorities has been inconsistent. Standards vary throughout the country both in terms of process, and content. Indicators and measurables vary between authorities. A particular shortcoming noted in the **2002 Report – "Planning the Economy"** – is the need for a more qualitative approach to employment land studies.

2.7 In the quest for a more informative and consistent approach to employment land monitoring, the then ODPM published the **Employment Land Reviews – Guidance Note**. The report provides some useful guidance and suggestions, although it does not commit local authorities to any particular approach to monitoring. A process is suggested and a list of possible indicators, appended. In our opinion, the report remains some steps away from understanding the practical reality of implementing an effective monitoring system but does identify assessment indicators which might be adapted to local circumstances such as those in the BDP area.

2.8 Development within town centres is guided by **PPS6 Planning for Town Centres** which seeks to focus development in existing centres in order to support the Government's objective of promoting vital and viable town centres. The main town centre uses to which this policy statement applies are retail, leisure and recreation uses, offices, and arts, culture and tourism. Of key significance is the sequential approach to development which now includes office uses.

2.9 **PPS7 Sustainable Development in Rural Areas** sets to achieve sustainable economic growth and diversification in rural areas whilst at the same time preventing urban sprawl. To encourage sustainable growth, development is to be focused in, or next to, existing towns and villages. It is aimed at delivering thriving, inclusive and sustainable rural communities.

2.10 The study area has a number of distinctive transport issues including capacity issues on the Strategic Road Network such as Ferndown on the A31. The proposed expansion plans at Bournemouth Airport and the Airport link road proposal have potential implications on the A338. There are also general rural accessibility issues across the remainder of Dorset. More detailed transportation matters are discussed on a site by site basis within the site appraisal work later in this report. **PPG13 Transport** promotes sustainable transport choices for both people and for moving freight, and improved accessibility to; jobs, shopping, leisure facilities and services by public transport, walking and cycling, and reducing the need to travel, especially by car.

2.11 **PPS22 Renewable Energy** promotes the use of renewable energy in new housing and industrial developments in accordance with the Government's Energy White Paper and promotes development of new technologies to enable the country's economy to grow and thrive.

2.12 **PPS23 Planning and Pollution Control** states that any consideration of the quality of land, air or water and potential impacts arising from development, possibly leading to impacts on health, is capable of being a material planning consideration. Likewise **PPG24 Planning and Noise** sets out the considerations to be taken into account in determining planning applications both for noise-sensitive developments and for those activities that will generate noise.

2.13 Flood risk implications of economic development proposals will be assessed in accordance with **PPS25: Development and Flood Risk**.

REGIONAL GUIDANCE

THE ECONOMIC STRATEGY

2.14 The South West Regional Development Agency (South West RDA) published a revised and updated **Regional Economic Strategy (RES)** for South West England in May 2006. The RES covers the period 2005 – 2016 and will guide South West RDA's work in the South West and will also be used to inform the RSS.

2.15 The Regional Economic Strategy's three core objectives are: raising business productivity; increasing economic inclusion; and, improving regional communications. The RES sets out a delivery framework to achieve these objectives:

2.16 **Objective 1: Successful and competitive businesses** to be implemented through the following priorities:

- Support business productivity
- Encourage new enterprise
- Deliver skills for the economy
- Compete in the global economy

- Promote innovation

2.17 **Objective 2: Strong and Inclusive Communities** to be implemented through three regional priorities:

- Improve participation in the economy
- Regenerate the most disadvantaged areas
- Plan sustainable and successful communities

2.18 **Objective 3: An Effective and Confident Region** which will be delivered by these the following priorities:

- Improve transport networks
- Promote and enhance what is best about the region
- Improve leadership, influence and partnership

2.19 Within the RES supporting documents, the Spatial Implications document identifies the Bournemouth / Dorset / Poole area as the South East Costal Function Zone. This zone contains about 13% of the regions population, concentrated in two economic centres. The focus of the zone is the Bournemouth-Poole-Christchurch conurbation, however the towns of Verwood, Wimborne Minster and Ferndown are recognised as being connected to the conurbation. The Zone also includes Weymouth, Dorchester, Bridport, Blandford Forum, Wareham and Swanage. In 2005 the conurbation accounted for 9.2% of the region`s GVA and 9.5% of the regional jobs.

2.20 The RES identifies that new business formation is strong in Bournemouth and Poole, where there is also high employment in the knowledge economy. The zone is a popular inward investment destination. Employment rates and economic activity are variable across the zone. Average wage rates and incomes, which are generally low, are boosted by an ‘urban elite’ working in high paid jobs within the zone or the south east, and have contributed to increasing house prices. However, the workforce has a relatively low proportion of higher level skills and an occupational structure with a small proportion of professional workers. Three of the region’s priority sectors are significantly represented in the zone; Tourism, Marine Technology and Advanced Engineering / Aerospace.

2.21 In terms of performance within the South East Dorset sub-region, the RES identifies:

- Levels of GVA per resident head within the sub-region are below those of other significant urban areas within the South West, and other parts of the country.
- There has been a re-structuring of the South East Dorset economy over the past twenty-five years. Traditional sectors, such as those associated with tourism, have declined

whilst employment levels have grown substantially in new sectors. By 2001 a combined Bournemouth and Poole area had a lower proportion of its employment in the manufacturing and 'other' production, than both the South West region and the UK.

- There is a shortage of available employment land. Almost half of the land identified by planning authorities is only likely to be made available in the long term.
- The proportion of those of working age population who are economically active and the percentage in employment are above the national average.
- Earnings within the sub-region are below the national average.
- The percentage of the working age population with qualifications equivalent to NVQ4 or above (i.e. degree level) is lower than the average rate in both the South West and South East region.

2.22 The towns of Shaftesbury, Gillingham and Sherborne are included within the defined A303 Corridor Functional Zone which runs from Salisbury in the east, through to Yeovil and Taunton in the West. In summary the RES finds that the A303 Corridor is not particularly distinct or economically coherent. Business formation rates range from average to low but employment and economic activity rates are relatively high. Employment in the knowledge economy is higher in the east than the west with skills and qualifications high across the zone. The RES reports the zone having experienced strong GVA per employee growth, particularly in SMEs.

2.23 Within the A303 Corridor Functional Zone the RES priority sectors present include Advanced Engineering, Food and Drink, Biotechnology and Environmental Technology. Key sectors include Advanced Manufacturing, the primary industry sector and traditional manufacturing. Gillingham is recognised as the fastest growing town in the County (in terms of housing and population) but employment growth is slow. Shaftesbury is seen as an important tourism and service centre and Sherborne is considered to have a diverse economy with a significant share of tourism.

REGIONAL PLANNING CONTEXT

2.24 The **Regional Spatial Strategy (RSS)** for the South West of England was published in draft for a 12 week consultation period running from 6th June 2006 to 30th August 2006. The RSS broadly builds upon the thrust of the adopted **Regional Planning Guidance (RPG10)** which seeks to direct most development to 11 Principal Urban Areas (PUAs) and a number of other strategic centres for growth while catering for a range of needs across the region, integrating transport and planning and protecting the environment.

2.25 The RSS now proposes significant change at 21 Strategically Significant Cities and Towns (SSCTs) which include Bournemouth, Poole, Dorchester and Weymouth, in order to support their economic and service role and regeneration. Smaller scale change outside of those places is promoted in order to achieve more self contained, balanced communities and a better local environment. Category B Towns (market towns such as Shaftesbury, Wimborne, Blandford etc) are identified as the focal points for the provision of locally significant development where there is an existing concentration of business and employment, or where there is realistic potential for employment opportunities to be developed and enhanced. Policy C settlements (small towns and villages) are expected to support small-scale economic activity which fits the scale of the settlement and can accommodate the future growth of businesses in the development permitted.

RSS EMPLOYMENT LAND PROVISION AND REVIEW

2.26 Section 8.3 of the RSS provides advice to local planning authorities (LPAs) on estimating employment land requirements and identifying strategic sites. Section 4 of the RSS provides an indicative range of jobs which are likely arise in the SSCTs. Authorities are expected to base their allocations of land on the understanding of the functional role of towns, local economic circumstances and the ODPMs 'Employment Land Review Guidance Notes'. In areas where employment and property markets overlap and cross administrative boundaries, LPAs are expected to work together to establish a realistic picture of need and respond to that across that area. Within the study area the RSS does not provide quantitative employment land requirements, however as noted below the Panel Report does consider this issue.

RSS EXAMINATION IN PUBLIC PANEL REPORT

2.27 In considering future workspace requirements within the study area we must also consider the key recommendations of the Panel Report issued in January 2008 into the Examination in Public (EiP) (7th April 2007 – 6th July 2007), these are considered below for each local authority. Proposed Modifications from The Secretary of State were published for consultation on Tuesday 22nd July 2008 for consultation prior to adoption in 2009.

RSS PANEL RECOMMENDATIONS FOR BOURNEMOUTH & POOLE HOUSING MARKET AREA

2.28 The Panel recommends that Bournemouth & Poole town centres are to be the main office and retail centres for the sub-region and planning of other areas should ensure that proposals do not come forward that would threaten the development proposals for the centres. Priority is also to be given to Poole's Twin Sails Bridge Regeneration Area for infrastructure and the Panel saw no evidence for the requirement for phasing of greenfield development to encourage regeneration opportunities. However, the Panel did recognise that development away from Bournemouth and Poole centres should complement the role these centres in light of their primary status in terms of the most people intensive and high quality uses such as major offices. The Panel also noted that development outside of the centres does not undermine Poole's Regeneration Area. The Panel therefore recommended that the next review of the RSS should consider comprehensive evaluation of the urban structure of the northern part of the conurbation.

2.29 With regards to employment land the Panel recommended a search for additional land to meet the target of 110 ha for employment development in the Bournemouth and Poole Travel to Work Area. Although it was the clear intention from the submissions by the local authorities that the 110 hectares includes undeveloped allocations however this has been reported in a confusing manner by the Panel initially, but has subsequently been raised to a requirement of 152 Ha in the proposed modifications to the RSS.

2.30 The Panel have recommended an increase in dwelling numbers from 40,150 to 48,100 for the Bournemouth & Poole Housing Market Area (HMA). The increase is a result of an additional 1,000 dwellings in East Dorset, an additional 1,500 dwellings north of Bournemouth, 2,750 dwellings in a new Area of Search in Purbeck on the western edge of Poole effectively forming a Western Extension of Poole/Upton with implications for settlements including Upton, Lytchett Matravers and Lytchett Minster (formerly known as the Western Sector). These areas are currently afforded protection by Green Belt policy. However despite objections from local authorities and local residents the Panel felt that in terms of sustainability an urban extension in the Green Belt adjacent to the conurbation was more sustainable than identifying land outside the Green Belt, which would necessitate commuting.

2.31 The Panel supported the view of the Regional Assembly submitted in their statement to the Enquiry in Public (EiP) that "Functionally Bournemouth, Poole, Christchurch and surrounding settlements, such as Wimborne Minster, Colehill, Ferndown, West Moors, St Lenards and St Ives and Verwood collectively operate as one". The Panel noted that the town centres of Wareham, Wimborne and Christchurch provide important nodal functions within the area. The Panel found that the northern part of the Bournemouth and Poole HMA can be considered to function separately from the southern part including Blandford Forum, which they felt clearly interacts with the conurbation.

2.32 With regards to the potential for longer term growth associated with Shaftesbury and Gillingham the Panel felt that it would be unrealistic to plan for substantial long term growth in this area. However whilst these settlements are not classified as an SSCT there will still be additional growth commensurate to their scale and role.

BOURNEMOUTH AIRPORT

2.33 With regards to the Airport, The Panel noted that discussions at the EiP made it clear that the new terminal was not dependent on the proposed infrastructure improvements (provision of new link road) and that the local road network could support some additional activity at the business park. The Panel noted however that the provision of the link road would make the business park more marketable, allow a higher level of development and ease traffic problems.

2.34 The Panel noted that a number of participants highlighted the difficulties involved in implementing the link road because of the need to allow for important environmental areas. It was suggested that these difficulties might make the link road an uneconomic proposition. The airport and the business park are commercial developments and therefore the link road will contribute to the value of these investments. The Panel presumed that the inclusion of the link road in Paragraph 4.3.14 relates to a public sector contribution and find it difficult to understand why it is not a planning requirement for the intensification of the airport function and the business park area. In their view it can only be regarded as a longer-term project in terms of public finance and investment.

2.35 The Panel reported that The Strategic Authorities sought a stronger commitment to Bournemouth Airport as a strategically important employment site which is suited to airport related and knowledge based employment growth. The Panel also noted that authorities pointed out that the airport location could provide more local employment for that part of the conurbation and thereby offer a more sustainable distribution. In terms of the deficiencies set out above for Bournemouth and Poole, the Panel assume that the airport, which falls within the Borough of Christchurch, was not taken into account. They conclude that development such as this should complement the town centres and the Regeneration Area. In the Panel's view this implies that such business park development should not aspire to development that would be better accommodated in the two town centres and the Regeneration Area.

2.36 In light of the above recommendations, the Panel recommended inserting Policy SR7.3 Employment Provision which proposed that South East Dorset should balance its economic potential, taking into account the high quality environmental assets, and provide for job growth, and make provision for growth of 45,400 jobs within the Housing Market Area (HMA). In the Bournemouth and Poole TTWA provision should be for about 42,000 jobs over the plan period, with about 23,000 jobs at Bournemouth and about 19,000 jobs at Poole. With regards to provision to meet any deficiency in employment land arising from the economic growth expected in the remainder of the HMA, this should be identified through the LDF process in the Policy B and C settlements.

RSS PANEL RECOMMENDATIONS FOR WEYMOUTH & DORCHESTER HMA

2.37 The RSS proposes a figure of 11,900 jobs in the Weymouth & Dorchester HMA with 7,300 – 9,500 jobs in Weymouth and Dorchester TTWA. The Panel accepted the HMA figure but recommended the figure of 9500 in the Dorchester and Weymouth TTWA should be used with additional policy wording to ensure that employment land supply is brought forward in the Weymouth area.

2.38 In terms of housing, the draft RSS proposed 13,800 additional dwellings whereas DCLG (2003) suggested an increase to 22,498 dwellings. The Panel therefore recommended a figure of 18,100 dwellings, to include an additional 3,000 dwellings proposed in an urban extension of Dorchester, an additional 700 dwellings adjoining the Weymouth area and 15% increase elsewhere in settlements such as Bridport.

RSS PANEL RECOMMENDATIONS FOR SOUTH SOMERSET HMA

2.39 West Dorset is influenced by the South Somerset HMA in terms of the sub-regional focus on Yeovil which has implications for settlements such as Sherborne. The Panel considers the task of addressing the significant employment land shortfall in Yeovil through developing a portfolio of sites should be addressed through the LDF within the broad context of the RSS TTWA figure for new jobs of 9,100. The Panel also recommended an additional 5,000 dwellings to be found in an area of search for an urban extension to Yeovil possibly including land in West Dorset.

FURTHER WORK FOR RSS

2.40 In light of the confusion at the EiP of the availability of employment land and the appropriate level of provision the Panel has recommended further work should be initiated prior to the next review of the RSS to provide a sub-regional framework for the provision of employment land. The Panel therefore recommended that the previous DTZ study could be developed to give a HMA / Sub-Regional Framework with District level guidance. Additional work has therefore been undertaken and this is discussed within the forecasting section of this report.

2.41 Following South West RDA comments at the EiP, revised employment policies are recommended by the Panel, these changes effectively consolidate Policies E1 - E4 into new policies ES2 and ES3. The Panel also recommended further guidance (revised Policy TC1) is provided to steer the provision of new office accommodation towards city centres where there is greater opportunity to accommodate high intensity developments in a sustainable way. The Panel also recommended further work to confirm the broad order of future need for office floorspace and what implications that will have for the strategic centres. These recommendations have subsequently been considered by the Secretary of State who has proposed a number of changes to the draft RSS, these are discussed below.

RSS PROPOSED MODIFICATIONS

2.42 On 22nd July 2008, the Secretary of State (SoS) published Proposed Modifications to the Draft RSS which will be consulted upon for a period of 12 weeks up to 17th October. The Modifications propose an increase in housing growth across the region above the Panel Report recommendations however these are unchanged for the BDP study area. The Modifications still project economic growth of 3.2% GVA per annum with the intention of delivering 484,500 jobs. However, the Modifications propose that references to the Bournemouth and Poole SSCT are deleted and redefined as the South East Dorset SSCT which includes Bournemouth, Poole and Christchurch, and Wimborne Minster, Colehill, Ferndown, West Moors, St Leonards and St Ives and Verwood.

2.43 A single Policy HMA7 (Bournemouth and Poole HMA) has been introduced to provide strategic growth policy for the sub-region including the South East Dorset SSCT. Through the new policy, the Modifications endorse the Panel Report recommendation for growth of about 45,400 jobs within the Bournemouth and Poole HMA, with 23,000 jobs in the Bournemouth TTWA and 19,000 jobs in the Poole TTWA.

2.44 With regards to the supply of employment land the Modifications now recommend the provision of 152 hectares of employment land (including 20 hectares of employment land at Area of Search 7G to the west of Ferndown), rather than the search for 110 hectares as stated in the Panel Report. The 152 hectares is consistent with the DTZ and South West RDA regional assessment and comprises existing commitments and additional allocations within the Bournemouth and Poole TTWA rather than the conurbation. We understand that a co-ordinated DCC response to the RSS Modifications will state that the DTZ figure should be replaced by the Workspace Strategy employment projection. This Workspace Strategy review will therefore seek to test, and ultimately refine the regional employment land analysis.

2.45 With regards to housing growth the SoS endorses the Panel recommendations with regards to a number of areas of search outside the existing urban areas. Within the BDP study area these areas of search include the following areas:

- 1,500 new homes in Area of Search 7A to north of Bournemouth (Bournemouth);
- 2,750 new homes at Area of Search 7B at Lychett Minster West of Poole (Purbeck);
- 600 new homes at Area of Search 7C to the north of Christchurch (Christchurch);

- 2,400 new homes at Areas of Search 7D/E/F to be distributed north west of Wimborne Minster, to the north west of Ferndown and north west of Poole (East Dorset).
- 3,000 new homes at Area of Search 12A in a 360 degree search around Dorchester (West Dorset)
- 700 new homes at Area of Search 12B adjoining Weymouth (West Dorset)

2.46 With regards to West Dorset a 360 degree Area of Search (13A) around Yeovil has also been proposed to accommodate 5,000 dwellings (West Dorset and South Somerset). 28 Hectares of employment land is expected to be delivered within the Weymouth and Dorchester TTWA.

2.47 With the exception of the Ferndown area of search all the other proposed urban extensions are only referred to in terms of housing growth and the need for economic development and job creation is not explicitly recognised.

2.48 With regards to transport, the Modifications outcomes have been set out in the policy for the corridor linking the communities in the north and the west of the SSCT with Bournemouth and Poole Town Centres. The Secretary of State considers that action will be necessary to address movement on these corridors if the spatial strategy is to be successfully delivered. Policy HMA7 therefore proposes *"demand management measures; sustainable travel measures; and if necessary, targeted new infrastructure investment to unlock pinch points".* However, the SoS has concluded that the RSS should not, at this stage include specific proposals for infrastructure improvements in light of the concerns about the way in which infrastructure requirements were identified in the draft RSS.

2.49 The Modifications make changes to the general extent of the green belt, removing the designation from land required to meet the development needs of the airport (CBC's representations to the RSS Modifications ask for clarity on the specific extent of amendment to green belt boundaries),, and removal of the green belt to accommodate employment land at Area of Search 7G (Ferndown).

2.50 The Modifications also show support for appropriate development in rural areas, including provision for housing and economic development in rural communities including small towns and villages with the intention of development delivering greater self containment and stronger local communities.

SUB-REGIONAL GUIDANCE

SUB-REGIONAL ECONOMIC PLANNING CONTEXT

2.51 The Bournemouth, Dorset & Poole Economic Partnership have also published an Economic Development Strategy covering the period 2005 – 2016, published in 2005 and titled **Raising the Game: Economic Development Strategy 2005-2016**. The document provides a shared vision for the sub-region in the context of economic development being; *"to develop a thriving, competitive business environment that delivers better quality employment opportunities and a better quality of life for local people in Bournemouth, Dorset and Poole"*. The document identifies a number of socio-economic issues that need to be addressed within the whole sub-region:

- not sufficiently recognised by regional agencies as a driver for economic growth;
- not as productive as we should be;
- a relatively low wage economy;
- experiencing significant skills gaps and shortages that may be made worse by a rapidly ageing population and out-migration of young people;
- one of the least affordable sub-regions in England in terms of the ratio of house prices to incomes;
- coming under increasing pressure from the business community to enhance the sub-region's infrastructure, facilities and services so that it remains an attractive location for investment;
- Striving to tackle the causes of multiple deprivation in both urban and rural areas.

2.52 In response to the issues raised above, the document seeks to 'raise the game' through a series of key priorities and relevant strategic actions as set out within an Action Plan annexed to the Raising the Game document:

- To improve physical infrastructure and transport connectivity.
- To increase the provision of affordable housing for key workers.
- To raise skills and workforce development.
- To improve business competitiveness, enterprise and innovation.
- To promote effective partnership working.

2.53 Following on from the publication of Raising the Game, a **Multi Area Agreement (MAA) for Bournemouth, Dorset and Poole** has been prepared and signed in July 2008. The MAA sets out a successful transition to a more strongly performing economy within environmental means including; a high value engineering sector; a nationally and internationally significant concentration of financial and business sectors; a world class higher education presence; attractive environment for young people; more efficient use of land in urban areas; cluster of newly emerging environmental technologies; sustainable, reliable and efficient transport systems; widespread broad band; business driven airport capable of sustaining a green technology business park; competitive sea ports; an Olympic legacy; and greater inter-regional cooperation and international links.

SUB-REGIONAL SPATIAL PLANNING CONTEXT

2.54 In light of the sub-regional work for the Regional Spatial Strategy, the **Replacement Structure Plan** has now been abandoned. A **Deposit version of the Bournemouth, Dorset, and Poole Replacement Structure Plan** was published for consultation in July 2004. Whilst this has not progressed to adoption it still remains a material consideration. However, the weight attached to this is not significant due to the early stages of the document's production. Therefore, the **Bournemouth, Dorset and Poole Structure Plan (2000)** is the current statutory structure plan with the 'saved' policies remaining in force until the emerging RSS replaces them.

2.55 The employment land provision contained within the deposit version is referred to as Employment Policy A. This allocates provision for 222 hectares of land to be developed for employment uses (B1 to B8) between 2001 and 2016. The adopted Structure Plan version proposed a total of 300 hectares between 1994 to 2011. Within the Replacement Deposit Plan the distribution between the districts is as follows (figures approximate and adopted Structure Plan figures shown in brackets):

Table 1 – Employment Allocations Structure Plan for 2001 – 2016

District	Employment Allocation
Bournemouth	21 ha (20ha)
Christchurch	42 ha (49ha)
East Dorset	23 ha (20 ha)
North Dorset	28 ha (40ha)
Poole	34 ha (29ha)
Purbeck	26 ha (30ha)
West Dorset	23 ha (71ha)
Weymouth and Portland	25 ha (41ha)
Total	**222 ha (300 ha)**

Source: Deposit Version of the Bournemouth, Dorset, and Poole Replacement Structure Plan 2004 for 2001 – 2016 (Adopted Structure Plan 2000 figures in brackets 1994 - 2011)

2.56 Furthermore, the adopted and deposit Structure Plan versions of Employment policy A state that:

"Local Plans / LDFs should ensure that an adequate choice of sites is maintained in each district in order to provide for the needs of local firms and inward investment, having regard to the need to maintain an adequate stock of land for both immediate and long-term needs".

The Replacement Structure Plan Economy Policy A is however extended and goes on to state*: "When considering the allocation of land for employment purposes, local planning authorities should additionally allow for the accommodation of waste management / treatment facilities where there is an established need for such facilities. Local authorities will work with the South West of England Regional Development Agency to secure commitment and investment to remove obstacles to the development of existing employment land commitments that accord with Economy Policy B".*

2.57 Employment Policy B within both the Adopted and Replacement Structure Plans specifies the criteria for assessing the location of new employment uses. It states that new employment development should be directed to locations which:

- provide the opportunity to reduce commuting by car;
- are well related to residential and associated facilities;
- are accessible by public transport, with good road and, where possible, rail access; and
- uses derelict, under-utilised or previously developed land where possible.

2.58 Policy B also relates to the protection of existing employment sites where they meet the above locational criteria. The policy specifies that such sites should be protected from other uses, other than to accommodate waste management / treatment facilities where there is an established need for such facilities.

2.59 In terms of high quality employment sites i.e. high technology and knowledge based industries, Replacement Structure Plan Employment Policy C (and similarly worded as Policy D in the Adopted Structure Plan) states that

"Provision should be made for sites to meet the special needs of companies which require locations with high quality environments. Such sites should be well related to residential and associated facilities, accessible by public transport, with good road and, where possible, rail access. Such sites should be protected from other uses".

2.60 Of particular importance for these types of employment uses is a high standard of layout, landscaping and design of estates and buildings.

2.61 Economy Policy E of the Adopted Structure Plan proposes major employment growth points during the plan period and beyond at the Airport and Winfrith Technology Centre to serve South East Dorset and former Defence sites in the Weymouth and Portland area to serve that area. The Adopted Structure Plan Policy F proposed new office developments in excess of 2,000 sq.m. should be accommodated in certain areas of Bournemouth, Poole and Weymouth and Dorchester. Policy G is included to ensure that employment land in Weymouth and Portland is made available to enable re-structuring of the economy, particularly in light of redundant MoD land and buildings. The Adopted Structure Plan also includes Policy H which seeks to encourage diversification of the rural economy in locations where car commuting maybe minimised.

DISTRICT LEVEL POLICIES

2.62 The existing policy context at a local level will be a key material consideration in making site specific recommendations in the Delivery Plan stage of this study. It is also important to understand the nature of each districts employment land policies. We hereby summarise the main implications by district.

PURBECK DISTRICT

2.63 The **Purbeck District Local Plan: Final Edition** sets out policies and proposals to guide development in Purbeck District up to 2011 and beyond. This consolidated version, although not adopted, still carries significant weight in planning decisions and will remain the key consideration until work on the Local Development Framework progresses further.

2.64 The Local Plan contains policies aimed at encouraging the retention of existing, and the development of new, employment opportunities by the allocation of specific sites for employment development. The plan seeks to concentrate larger scale and heavier industrial or storage uses in the existing industrial estates. Policy MN1 relates specifically to the retention of existing employment sites and states that:

> *"Proposals for development which would result in the loss of existing employment uses or land (Classes B1 or B2 of the Use Classes Order), or land safeguarded for future employment uses, will not be permitted unless the current use is causing serious environmental or amenity problems and/or it can be demonstrated that development for other uses will achieve other objectives of the Plan."*

2.65 Policy MN2 refers to a number industrial estates defined on the proposals maps and permits development on these identified sites providing that it is for employment uses as defined by the Use Classes B1, B2 and B8. Policy MN3 permits employment development outside of defined industrial estates (under MN2) provided that it falls within defined settlement boundaries and is restricted to B1 use. Policy MN3a permits limited employment development within the countryside.

2.66 The Council is progressing with its Local Development Framework. When adopted, the Core Strategy will set out the overarching spatial framework for development within the District for the period 2006-2026. Whilst the timescale for adoption is slightly unclear in light of the RSS work, The Preferred Options stage of the Core Strategy (September 2006) identifies that the District possesses two locally significant employment sites; Winfrith Technology Centre and the Holton Heath Trading Estate. Winfrith Technology Centre is recognised as a prestige centre for research and development industries, and is identified as having further potential to promote employment uses that conform to its prestigious character. Holton Heath Trading Estate has established industrial units.

2.67 The policies contained within the Core Strategy Preferred Options are obviously draft at this stage but should be taken into consideration. Preferred Option 29 seeks to protect and enhance existing employment areas, as identified in the accompanying proposals map, for B1, B2 and B8 employment uses. Preferred Option 30 encourages new employment development or redevelopment for employment purposes in the following broad locations:

- Existing identified employment areas;
- Within the three main towns of Swanage, Upton and Wareham; and
- In other locations through the conversion of redundant buildings to rural workspaces where well they are well related to existing settlements.

2.68 Finally, preferred option 31 relates specifically to the knowledge based economy. It seeks to

"retain and support the creation of knowledge-based employment opportunities in the high-tech research and development sectors, in particular, through optimising the potential of the Winfrith Technology Centre".

2.69 We are also aware that the Council's only planned Area Action Plan which will include Winfrith is in the early stages of preparation.

WEST DORSET

2.70 The current West Dorset District Local Plan, which contains policies and proposals for development and use of land in West Dorset, was adopted by the council on 14 July 2006. It guides development within the District up until 2016. The Employment Strategy for the district seeks to safeguard the existing stock of employment sites and premises as well as allocating new sites in or near to the main towns. Furthermore to support the rural economy, the strategy allows the development of businesses within or adjoining the smaller settlements (including extension and conversion of buildings) as well as supporting agricultural diversification projects.

2.71 The Local Plan has identified 32.7 hectares of land for employment use within the plan period. These sites are identified within the plan but generally the new employment site allocations are within or close to the main towns in the District or in what is considered to be the most sustainable villages.

2.72 Policy ET1 of the Local Plan relates to the retention of industrial and commercial sites. It states that:

> *"Proposals which would lead to the loss of employment land and/or premises will not be permitted except where:*
>
> *(i) the current use is causing, or if vacant or derelict the previous lawful use would cause, significant highway, environmental or amenity problems and it has been demonstrated that no appropriate viable alternative employment uses could be attracted to that site; or*
>
> *(ii) the mixed-use redevelopment of the site would offer important community benefits and opportunities for regeneration and it can be demonstrated that the development will not result in a significant loss of jobs in the area."*

2.73 West Dorset District Council is progressing with the development of its Local Development Framework. The Core Strategy Development Plan Document was consulted at its issues and options stage in August and September in 2007. It is intended that the Core Strategy will set out a vision for the future of West Dorset, a spatial strategy and a series of development control policies to be used in making decisions on planning applications. The issues and options stage was largely explorative and intended to seek the views of interested stakeholders rather than provide detailed employment policies.

EAST DORSET

2.74 The East Dorset Local Plan was adopted on 11th January 2002 covering the period to 2011 and amended by the Secretary of State September 2007. The Structure Plan proposes a total of 20 hectares of development for the District. As of the beginning of 1999 a total of 8 hectares of employment land had already been completed, leaving 12 hectares to be implemented over the remaining 12 years of the plan period. The allocations within the adopted Local Plan seek a further 17.4 hectares of employment land to be developed. The majority of the land allocated is based at the Uddens and Ferndown Industrial Estates, with a small development at Verwood.

2.75 Policy INDEV1 relates to industrial development and states:

> *"Industrial development will be permitted within the limits of the established industrial estates at Ebblake; Brook Road (Wimborne); Ferndown; Riverside (Wimborne); Stone Lane (Wimborne); Bailie Gate (Sturminster Marshall); Uddens; Gundrymoor and Woolsbridge, as defined on the Proposals Map. Elsewhere, in the urban areas as defined on the Proposals Map, development and redevelopment for the same uses within established sites for business (Use Class B1), general industry (B2), and warehousing (B8) will likewise be permitted."*

2.76 The relocation of existing industrial uses will be sought under Policy INDEV2 where they generate amenity impacts inappropriate to the character or amenity of the local area. There do not appear to be any generic policies relating to the protection of existing employment sites however detailed policies are proposed for individual settlements which include reference to specific employment locations.

2.77 With regards to the production of the Local Development Framework, Christchurch Borough Council and East Dorset District Council are working together in the production of the Core Strategy. An Issues and Options consultation document was published in March 2008 and included a number of suggested discussion issues with regards to sustainable economic growth. The paper also examined a number of urban extensions in light of recommendations within the RSS for areas of search around Ferndown and Wimborne Minster. We understand that the first consultation on a Site Allocations DPD may commence in early 2009.

CHRISTCHURCH

2.78 Planning decisions are made in accordance with The Borough of Christchurch Local Plan adopted in March 2001 (as amended by the GOSW as of 27th September 2007) which covers the period to 2011.

2.79 Local Plan Policy EI 1 relates to the protection of existing industrial employment sites and states that:

> *'in order to preserve the availability of employment-generating land and buildings, planning permission involving the loss of existing industrial and commercial uses, including those within Use Classes B1, B2 and B8, will not be permitted unless they are situated in residential areas causing environmental and amenity problems to the locality'.*

2.80 With regards to the Airport, Policies EI5 and EI6 specify the needs of a development framework before significant development can be brought forward. Policy EI5 states that land within the boundaries of the Airport is identified for a comprehensive development or redevelopment scheme for employment uses (B1, B2 or B8). The Policy allows development subject to the approval of a comprehensive brief to guide future development which will cover; phasing programme; sequence of on/off - site infrastructure improvements; timing of highway / transport improvements as listed in the policy; where appropriate measures to protect neighbouring sites of Special Scientific Interest.

2.81 However, in light of the short term development requirements of the Airport, Policy EI6 allows for limited development for either employment uses, use classes B1, B2 and B8, or operational airport activities providing that development does not prejudice the implementation of Policy EI5.

2.82 The Local Development Framework is being progressed with the Core Strategy being developed jointly with East Dorset District Council as discussed above. Of key significance are the highlighted discussion issues around Bournemouth Airport. Planning for the airport (including an employment vision) is being addressed in the Core Strategy and Airport SPD, not through an AAP as previously envisaged. However an Airport AAP was subject to an Issues and Options consultation in February 2006.

2.83 A masterplan for the airport has also been prepared and adopted by the owners in May 2007 although this relates to the operational airport only, the draft Core Strategy acknowledges that this can be used to inform the LDF. A feasibility study and masterplan was developed specifically for the Northern Business Park in 2003 by the owner Manchester Airport Developments Limited. RPS Burks Green have prepared a spatial framework for Aviation Park West which supersedes the 2003 EDAW study. This new spatial framework is evolving and will inform the LDF process. An economic study by Nathanial Lichfield (2008) has also been prepared for the airport which assesses the potential employment provision and establishes options for employment development for the whole of the Northern development zone. With regards to transportation, as identified within the recent LDF Core Strategy consultation, Manchester Airports has commissioned Peter Brett Associates to conduct a transport assessment to determine the quantum of development that will trigger the need for transport improvements which will feed into the LDF process in terms of the level of development that needs to come forward at the airport to meet demand and the transport improvements this triggers. The study will also provide a costing of the level of infrastructure to support growth of the northern business park.

NORTH DORSET

2.84 North Dorset District Wide Local Plan (First Review) 2011 was adopted by the Council in January 2003 and will run for the plan period up until 2011. The majority of the employment development will be concentrated in Blandford, Gillingham and Shaftesbury in line with the overall strategy of the Plan to encourage sustainable development.

2.85 Policy 3.3 of the Local Plan relates specifically to the protection of existing employment land and states that:

> *'to protect future employment prospects, permission for the change of use of a building or site from an employment to non-employment use will not be permitted'.*

2.86 Work has begun on the Core Strategy for North Dorset. The Core Strategy was subject to an Issues and Options consultation in June and July, 2007. Initial work has begun on the Development Control Policies DPD which will contain policies directly applicable to employment sites. Of note within the Core Strategy Issues and Options is the statement that

> *"development of employment land has exceeded the rate given in the Structure Plan and has kept pace with the development of residential land. In spite of this, the District has a net commuting loss, with more people commuting out than in. This movement leads to perceived traffic congestion. Blandford Camp provides employment in the south-east of the District but its future is uncertain following the Defence Training Review".*

BOURNEMOUTH

2.87 The document setting out the Council's planning policy is the Bournemouth District Wide Local Plan. This plan was adopted on 26th February 2002 and sets out planning policy up to 2011.

2.88 In strategic terms, the level of provision for employment sites will be such as to meet the forecast needs of the economy and the projected labour supply. Policy 5.3 seeks to promote B1 development within the built up area. A number of site specific policies are included and it is proposed that B1 proposals of more than 2,000 m^2. gross floorspace will be confined to the Lansdowne and the Castle Lane East areas.

2.89 Policy 5.4 of the adopted Local Plan seeks to protect employment sites. It states:

> *"Development likely to result in the loss of allocated uses within Classes B1, B2 or B8 of the Town and Country Planning (Use Classes) Order 1987, as shown on the Proposals Map, will not be permitted. Development likely to result in the loss of existing uses outside the allocated sites for B1, B2 or B8 uses of the Town and Country Planning (Use Classes) Order 1987, will not be permitted except:*

(i) In the cases of uses located in residential areas that cause environmental problems and existing industrial and storage uses within shopping areas;

(ii) Where there is a sufficient supply and range of employment sites available; or

(iii) In the case of industrial premises in residential areas where these premises are vacant, are likely to remain so and not suitable for modern working practices".

2.90 The Local Development Framework is currently in its early stages with the publication of the Core Strategy and Generic Development Control Policies DPD awaiting the outcomes of the RSS.

POOLE

2.91 The Poole Local Plan First Alteration adopted on 30th March 2004 (as amended by Secretary of State Direction 20th September 2007) sets out policies to guide development in the town up to 2011. The objective of the Local Plan in relation to employment is to maintain the prosperity of the Borough and seeks to achieve this by:

- the varied provision of employment opportunities to retain economic balance;
- promoting tourism and leisure as growth industries;
- promoting Poole as a gateway to Europe;
- the provision of sufficient housing to meet all sectors of the market; and
- limiting congestion and enhancing accessibility.

2.92 Policy E1 of the Local Plan reserves employment land for uses within classes B1, B2 and B8 within sites allocated on the proposals map amounting to some 42.52 hectares. Policy E2 specifically relates to the protection of existing employment sites and states:

"Within existing employment areas identified on the Proposals Map, development proposals for uses other than those falling within Use Classes B1, B2 or B8 will not be permitted unless they:

i) are for a temporary use which complies with Policy E7;

ii) concern sites or premises with specific policies for alternative uses within the plan; or

iii) concern sites or premises whose current/previous use does not fall within use classes B1, B2 or B8. In such circumstances proposals will only be allowed if they are compatible with neighbouring uses and would not prejudice the employment-related character of the existing employment area."

Hotels will be permitted within existing employment areas provided that the operations of any adjacent B1, B2 or B8 uses, opportunities for new B1-B8 investment, and the principal employment-related character are not prejudiced in those employment areas as a result of the scale, location or cumulative impact of such development".

2.93 For existing employment sites and premises outside identified employment areas and allocated sites, Policy E3 is applicable. It states that

'proposals for alternative uses will be considered if they would result in benefits sufficient to outweigh the loss of employment sites/ premises in terms of amenity, vitality, design, community needs, traffic, or environmental enhancement'.

2.94 The Borough of Poole is progressing with the production of its Local Development Framework. The Core Strategy has been recently submitted to the Secretary of State on 27th May 2008. The document makes reference to a number of principal locations for economic investment and sets out detailed proposals for key employment sites which are considered further within the Delivery Plan section of this report. Policy PCS 2 in the Core Strategy seeks to retain existing employment areas, which are not specifically limited to Use Classes B1, B2 and B8 as the Policy also reserves these areas for 'uses which generate employment', subject to criteria set out in the policy.

2.95 The production of the Site Allocations DPD is also underway. The Issues and Options consultation took place during August and September 2007. Preferred Options is expected in June / July 2008 with Submission in April 2009 and Adoption scheduled for October 2010. Within the Issues and Options DPD, it identifies the option of adopting a strategy of reinventing and rejuvenating Poole's existing employment areas to make more efficient use of existing employment land and premises should the planned provision of employment floorspace in the central area prove unachievable. Furthermore, land south of Sopers Lane and the Hamworthy Engineering site at Fleetsbridge are discussed as examples of existing employment areas which offer scope for a comprehensive approach to redevelopment and improvement and offer the prospect of delivering employment sites of strategic significance.

WEYMOUTH AND PORTLAND

2.96 The Weymouth and Portland Local Plan was adopted in December 2005. The Structure Plan allocated 41 ha of land for employment uses within the Borough between 1994 and 2011, the Local Plan acknowledges that approximately 65 hectares (160 acres) of employment land have already been committed for development between April 1994 and 2005 largely as a result of granting planning permission for new employment uses on former Ministry of Defence sites. There is a recognised need to allocate more land for the expansion of existing businesses in and adjacent to the Borough and to provide for a range of types and size of sites to help meet the full range of employment needs. It is therefore proposed within the Local Plan to allocate an additional 10.39 ha of land for employment within Weymouth & Portland.

2.97 Policy E2 of the Local Plan seeks to retain existing employment sites and premises. It states that:

> *"Proposals that would lead to the loss of existing employment land or premises will be considered against the following criteria:*
>
> *(i) whether the site is required in order to maintain an adequate supply of serviced sites / available premises and a range and choice of such sites / premises that satisfy modern business requirements;*
>
> *(ii) the availability of evidence to demonstrate that meaningful efforts have been made to secure alternative employment uses or the redevelopment of the site for employment purposes;*
>
> *(iii) the site's suitability for continued employment use in terms of its location relative to the main highway network, its accessibility by transport other than the private car, and its location in relation to residential areas;*
>
> *(iv) whether the proposal would lead to the reuse of a building of historic interest;*
>
> *(v) the impact of the existing employment use upon the living conditions of neighbouring residents.*

2.98 In addition to the above policy, Policy E3 seeks to retain the harbour, marine and fishing industry facilities and states that

> *'in order to maintain the viability of Weymouth and Portland Harbours for commercial and/or leisure uses, development which involves the loss of important harbour, marine and fishing facilities including slipways, cranes, hoists, boat repair yards and fish landing facilities will not be permitted'.*

2.99 In terms of the Local Development Framework, the Core Strategy Issues and Options DPD was subject to a public consultation until September 2007 and included a specific issues paper on the economy. The Core Strategy is not expected to be site specific but will consider appropriate levels of greenfield and brownfield development, and phasing of development. The Issues and Options consultation did however encourage existing employment sites to retain their uses due to low levels of employment land supply. Specific threats to economic development in the Borough identified a shortage of serviced developed land and a lack of modern industrial and office space. There was also a recognised requirement on Portland for more general employment facilities serving less specialised employment needs, as well as recognition of how many redundant premises were created following the departure of the defence industry in Weymouth and Portland.

SUMMARY

2.100 There is a clear support on national, regional and local level for an adequate supply of employment land to allow sustainable communities and reduce commuting. With regards to employment land the Panel Report of the Enquiry in Public of the Regional Spatial Strategy recommend an employment land supply of 110 ha in the Bournemouth and Poole Travel to Work Area. The proposed modifications by the Secretary of State have increased this figure to 152 ha of employment land supply in line with the regional employment land study provided by South West RDA.

2.101 However, there is also a strong competition for land, especially from housing, which also enjoys policy support although there is no explicit policy guidance which supports redevelopment of employment sites for housing.

2.102 The draft PPS4 Sustainable Economic Development places greater emphasis on the role that economic development should play in the plan making process. PPS4 also encourages the adoption of a greater level of flexibility for employment allocations made through the plan process, encouraging less restrictive policies when making Use Class designations.

2.103 On a district level the employment land protection policies are central to the successful protection of existing employment land. The employment land protection policies vary significantly across districts within the sub-region.

2.104 East Dorset does not have a general employment land protection policy, however detailed policies are proposed for individual settlements which include reference to specific employment locations.

2.105 Purbeck, West Dorset, Christchurch, Weymouth & Portland protect their existing employment land but have clauses that allow change of use under certain circumstances. The definition of the circumstances which allow a change of use vary significantly between the districts. In Christchurch for example they are very clear and restrictive where as in other districts they are more open for interpretation.

2.106 Bournemouth and Poole distinguish between employment locations identified on the proposal map, which are strongly protected and other employment sites which are less protected.

2.107 North Dorset does not allow any change of use of a building or site from an employment to non-employment use.

3. COMMERCIAL PROPERTY MARKET REVIEW

3.1 This section provides a property market analysis of the study area. The intention is to carry out the assessment on two levels; firstly to position the sub-region within the national and international property and investment market to ascertain the needs, requirements and trends within the wider property and investment market, secondly; to assess the different property markets within the sub-regions focusing on the Strategically Significant Cities and Towns and the market towns and rural areas. This assessment is based on discussions with GVA Grimley's in house commercial property teams, local property agents and the District / Borough Councils and covers stock, take-up, availability, rents and values.

3.2 The assessment concentrates on the industrial / distribution and office property markets most relevant to this work and we examine the following:

- the market areas;
- employment land market demand by key area;
- overspill pressures influencing demand; and
- definitions for distinct and sub-market areas.

MARKET AREAS

3.3 On a micro level each town has its own characteristics but there are also clear groupings that make natural market areas. In addition there are particular linkages between them, related to types of land use and road infrastructure.

3.4 GVA's research findings have concluded that the main market areas and interactive sub-market areas within BDP would appear to be:

- **Bournemouth and Poole Conurbation** which includes Ferndown, Christchurch, Wimborne, Bournemouth Airport, Holton Heath and Upton.
- **Dorchester and Weymouth & Portland** including Bridport[4] and Winfrith.
- **Remaining Rural Areas** including the settlements of Wareham, Swanage, Minster, Blandford Forum, Sturminster Newton, Shaftesbury, Gillingham and Sherborne.

[4] Although Bridport does not fall within the Dorchester and Weymouth TTWA our market research indicates that it is perceived as part of the Dorchester and Weymouth & Portland commercial property market area.

NATIONAL MARKET OVERVIEW

3.5 In assessing the BDP property market we must consider the national market context. GVA's Research Team's latest UK Commercial Property Market Update (April 2008) provides an overview of;

- Recent investment performance
- Recent occupier market performance
- Commercial property market outlook
- UK Economic Outlook.

3.6 The main headlines within the update find:

- In investment terms the re-pricing of commercial property has continued, although the rate of upward yield movement has eased. However, the IPD Monthly Index recorded another record fall in capital values in the year to March at -15.1%.
- In occupier terms the market remains subdued. The recent strong rental growth in the central London office market is reducing rapidly, and rents are rising at a slower rate than inflation across the rest of the commercial property sector.

3.7 In terms of outlook in the market GVA Research indicates the re-pricing of the commercial property market looks to be coming to an end, and yields are expected to level off over the next 2-3 months.

3.8 The overall headlines provide the current market context however we must note that this Workspace Study is long term and predicting long term future market conditions can never be accurate. GVA's Economic Outlook information provides a limited steer in the short to medium term with an "all property forecasts" summary noted in table 3 below.

3.9 Even though the year on year total return figures were expected to improve towards the end of 2008 this is now unlikely and there is still expected to be a negative overall performance, although this is expected to turn positive again in the first half of 2009 and be in excess of 6% for 2009 as a whole, as noted in table 3 below.

3.10 On a national level on the occupier side, table 3 shows that all property rental growth is expected to fall to under 1.7% pa by the end of 2008 primarily due to the strong influence of central London offices. The table also shows a further weakening of rental growth in all sectors beyond 2008 to a low of 0.4% in 2009. The rental growth slow down is explained by expected zero employment growth in 2009 which will affect occupier demand. However, as noted below there is still a significant level of rental activity within the sub-region.

3.11 In summary the table illustrates that the current market conditions indicate a marked slow down in rental and capital growth and subsequently total return through to the end of 2009, however the longer term forecast is one of stability and growth. Therefore, for the purposes of undertaking this Workspace Strategy being long term in nature, the market forecasts would indicate that we should be assuming a context of steady property return growth.

Table 2 – All-Property Forecasts Summary (%)

Year	Rental Growth	Capital Growth	Total Return
2006 (a)	4.3%	12.6%	18.1%
2007 (a)	4.6%	-7.7%	-3.4%
2008 (f)	1.7%	-10.0%	-4.8%
2009 (f)	0.4%	0.2%	6.2%
2010 (f)	1.2%	3.2%	9.2%
2011 (f)	2.3%	4.6%	10.8%

Source: Real Estate Forecasting, GVA Grimley, IPD (April 2008)

BOURNEMOUTH, DORSET, POOLE SUB-REGIONAL MARKET

EXISTING COMMERCIAL FLOORSPACE STOCK

3.12 As a baseline Bournemouth Borough Council has provided extracts of the ODPM 'Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation) 2008' on its website which shows the stock of industrial and warehousing floorspace broken down by district and shown in the context of the South West and England and Wales. This is illustrated within Table 3 below.

3.13 The table shows that the South West economic floorspace breakdown is dominated by factories and warehousing, a trend shared by all of the local authority areas with the exception of Bournemouth which has a higher proportion of office floorspace than factories and warehousing combined. Other notable trends (in terms of floorspace area) for each authority include:

- **Bournemouth**: Highest office floor space of all districts, third lowest of all districts for factory floorspace although third highest for warehouse space.
- **Poole**: Second highest office floor space, but highest factory floorspace by a considerable distance being almost double the amount of the next highest (East Dorset), warehouse space is also the highest of the districts but less than half that of the factory floorspace.

- **Christchurch**: Of all the authorities the District contains the lowest 'number' of warehouses, and second lowest 'number' of factories however in terms of 'area' the District performs slightly better suggesting slightly larger than average unit sizes. Also contains third lowest number of offices by District.
- **East Dorset**: Characterised by a high level of factory floorspace, largely attributed to the Ferndown Industrial Estate.
- **North Dorset**: Lowest office floorspace of all districts (joint with Weymouth & Portland) with floorspace largely dominated by factory accommodation. However the district has a high number of offices units, resulting in a small average suite size.
- **Purbeck**: Second lowest total floorspace for offices/factories/warehousing combined of all districts (Weymouth / Portland being the lowest), the lowest of all districts for warehousing.
- **West Dorset**: Third highest floorspace totals for all districts with second highest (to Poole) of warehousing floorspace of all districts.
- **Weymouth and Portland**: Lowest combined total floorspace of all districts for offices / factories / warehousing, but double the warehousing floorspace of Purbeck.

Table 3 – Employment Floorspace Stock (in '000 m^2)

	Retail		Offices		Factories		Warehouses		Other bulk premises		All bulk classes	
	Number	Area	Number	Area	Number	Area	Number	Area	Number	Area	Number	Area
Bournemouth	2,717	551	897	325	342	149	326	154	145	47	4,427	1,226
Poole	1,291	327	699	237	989	665	308	236	106	33	3,393	1,488
Christchurch	549	114	251	61	281	264	119	85	42	16	1,242	540
East Dorset	567	89	391	68	720	358	247	116	118	34	2,043	665
North Dorset	550	83	277	39	555	265	217	104	116	28	1,715	519
Purbeck	423	46	149	54	381	123	125	36	82	18	1,160	277
West Dorset	1,065	159	555	116	857	333	624	178	205	66	3,337	852
Weymouth & Portland	779	141	206	39	217	91	246	78	89	25	1,558	374
Total BDP	**7,941**	**1,510**	**3,425**	**939**	**4,342**	**2,248**	**2,212**	**987**	**903**	**267**	**18,875**	**5,941**
South West	50,928	9,877	28,067	7,257	27,921	16,839	22,529	12,638	6,985	2,035	136,430	48,647
England & Wales	515,961	99,376	328,761	96,700	247,273	196,669	194,588	151,273	55,039	19,099	1,341,622	563,116

Source: DCLG, Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation), 2008

OFFICE MARKET

3.14 Bournemouth and Poole account together for 60% of all the office floorspace within the sub-region. However, GVA's London based office agency team considers Bournemouth and Poole to be two distinct markets with Poole being the poor neighbour to Bournemouth in what they generally classify as a rather 'stagnant market'. A view not shared on the ground by Poole Borough Council's officers who believe that whilst Poole has been slow in realising its office potential, the perception is now changing with developments such as Link House, Bolton House and Towngate House coming forward. Branksome Business Park outside Poole Town Centre is also reportedly nearing full occupation. Central Bournemouth is characterised by the Lansdowne area which largely comprises secondary space built between the 1970's to early 1990s with limited development since. Rent levels are reported in the high teens per square foot (p.s.f), although current market conditions have meant that new development has not yet as previously expected hit £20 p.s.f.

3.15 In terms of demand, the view is there is not a great deal of inward investment predominantly explained by the perception that the Bournemouth and Poole sub-region is detached from London in terms of the road network which is characterised by 'roundabouts and dual carriageways' once you leave the M27. The agents also believe that the area performs badly when compared with the likes of Southampton which has ready motorway access to London whilst still providing the coastal location which inward investors maybe aspiring to. The low office market profile of Bournemouth / Poole in comparison to Southampton and Portsmouth is also recognised within the property press, for example the Estates Gazette (10th May 2008) stated *"it would be unfair to say that Bournemouth never makes the podium, but its bronze achievements often look lacklustre compared to Southampton and Portsmouth's precious medals"*. The same article however highlights the work underway to establish a regeneration company within Bournemouth which will focus attention on developing key sites within the centre owned by the Council. In our discussions, local Agents Cowling and West do however believe that competition with Portsmouth and Southampton isn't an issue because Bournemouth has a different offer in terms of significantly lower rents and a better quality environment. For example, Rokscars new build accommodation at St Paul's Square in Bournemouth was recently being quoted at £18.50 p.s.f, whereas Terrace Hills new Mayflower development in Southampton is expecting to achieve £23-25 p.s.f.

3.16 Whilst concern has been raised by some of the Local Authorities as to the accuracy of the information on the basis that it is evolutive and only provides a snap shot of the market, we have been provided with The Property Pilot's recorded levels of enquires for office accommodation which provides the only record of enquiries for the entire study area. The Pilot indicates 505 enquires for office space (01 Jan 2007 – 30 April 2008) amounting to 1,121487.96 sq.ft. (104,186.23 sq.m.) across the BDP area. These enquiries predominantly fall within the 0-999 sq.ft band (276 no.) and 2000 – 4999 sq.ft. band (173 no.), two large requirements between 50,000 – 100,000 sq.ft. were however registered within the timeframe. During the same period 65 no. enquires were logged for serviced office accommodation amounting to 89,899 sq.ft. (8351.62 sq.m.).

3.17 In terms of supply and take up of refurbished office stock the agents view is that the Bournemouth and Poole market is reasonably balanced. GVA reports good take up of refurbished stock in both Bournemouth and Poole. GVA is currently jointly marketing Telecomm House in Lansdowne where only 3,500 sq.ft remains and take up was quick on 3 suites at £14 p.s.f. although smaller suites have been slightly more difficult to let. Agents report a shortage of secondary accommodation with raised floors which has contributed to the good take up at Telecomm House.

3.18 Within Poole a complete refurbishment of the 35,512 sq.ft. Link House is currently underway, quoting rents at £16.50 p.s.f., which has attracted a number of potential occupiers including a national bank looking to set up a regional office. Agents report most office requirements in Poole being between 3,000 – 6,000 sq.ft with the general perception that the Poole office market is dispersed around the town.

3.19 In terms of new build, the agents view in Poole is that expected top end rent levels (£17 p.s.f.) will not allow developments to stack up financially. This is also the case in Bournemouth where the market perception appears to be that office development is being stifled by the low level in rental return. This is important for speculative development but less so for owner occupiers, who do not need a rental return on their property investment. There are however examples of mixed use schemes such as Bolton House in Poole where poor quality office space has been upgraded although this is as part of a larger mixed use scheme with new residential elements supporting the office upgrades. The approach of enabling development is considered to reflect the forthcoming guidance in PPS4.

3.20 Local Agent, Goadsby, reports knowledge of two new office developments coming up in Poole, both in the region of 20,000 sq.ft. and a few other developments coming forward on the fringes. However, it acknowledges that the real demand is in Bournemouth where there is a limited number of new build developments including a 40,000 sq.ft development taken up by the University. Goadsby believes the demand indicates that Bournemouth has dated and limited stock fuelling prices, the same applies to freehold where there has been robust demand for freehold in Bournemouth from owner / occupiers, and not so much in Poole. Despite the current credit crunch Goadsby is also quoted within the Estates Gazette (10th May 2008) as painting a healthier investment market on the Bournemouth side of the New Forest than in Southampton reporting *"more property interest"* and *"still relatively strong demand for sub £5m opportunities".* However, Cowling and West report an apparent lack of available freehold office accommodation within the conurbation (including Christchurch, Ferndown and

Wimborne), and if it was available then in the current economic climate they believe that companies would struggle to raise the capital to purchase accommodation.

3.21 Cowling and West reported significant levels of second hand office availability developing in the conurbation but demand is actually for new build and high specification office accommodation, particularly within 5,000 – 10,000 sq.ft. units and above. In marketing the 100,000 sq.ft. St. Paul's Square scheme in Bournemouth being developed by Rokscar (a joint venture between Rok Development and Scarborough Development Group), Cowling and West received a significant number of enquiries. Whilst the development is looking unlikely to proceed (the site is considered in further detail in section B of this report), Cowling and West are reasonably confident that they could have filled the space (comprising two buildings of 70,000 sq.ft and 30,000 sq.ft) in light of interest they received from banks and stockbrokers. In light of the apparent over supply of second hand accommodation, Cowling also report that clients are now considering substantial refurbishments in Bournemouth including one for 40,000 sq.ft which will include complete external re-cladding and installation of new air conditioning and power systems. Despite the apparent demand outlined above, Cowling report little or no new office development within the conurbation and particularly within Poole which they consider to be less attractive for office requirements than Poole in light of access considerations.

3.22 What is clear from the agents, both nationally and locally in Poole and Bournemouth is that the nature and scale of enquires for office space are not concerned with the strategic context in terms of skills base and access to international transport links etc. Concern however is raised by the property profession that the inward investment which has been attracted to the conurbation is potentially susceptible to the global economic crisis in light of the heavy bias towards financial companies. Evidence of downsizing is already happening with Barclays looking to reduce its operational space from 350,000 sq.ft. to 150,000 sq.ft., however The Bank of New York Mellon have located to the area and are still expanding reportedly due to skills present in the local workforce.

3.23 With regards to elsewhere within Dorset including Ferndown and the Airport the view is one of reasonably low quality office stock with demand predominantly arising from local companies. However, Aviation Park West does contain some particularly high quality office stock such as the Basepoint Centre. One of the key findings of the Nathanial Lichfield Study was that given changes to the image of the airport site a significant office cluster could be promoted.

3.24 As of May 2008 the Property Pilot for Bournemouth Poole and Dorset indicated the following office availability by no. of units as shown in Table 4.

Table 4 – Office Availability

	Office	Serviced Office	Total
Bournemouth	112	9	121
Christchurch	36	1	37
E Dorset	34	4	38
N Dorset	36	0	36
Poole	73	16	89
Purbeck	14	0	14
W Dorset	34	15	49
Weymouth & Portland	7	0	7

Source BDP Property Pilot, 21/5/08

INDUSTRIAL MARKET

3.25 Poole appears to be the main focus of industrial premises within the study area, accounting for 28% of all industrial floorspace within the sub-region. However significant pockets do exist elsewhere outside the Poole TTWA, most noticeably on significant estates such as those at the Airport and Ferndown both of which are in the Bournemouth TTWA. The remaining industrial areas within the wider Dorset area appear to be commensurate to the scale and role of the settlements in which they are situated.

3.26 The general perception is one of sharp decline in manufacturing in recent years. The Estates Gazette (10th May 2008) reported the most significant deals in the past five years in Dorset being warehousing and distribution transactions. There does however appear to be success in the marine manufacturing sector which is viewed by many as a priority sector in Dorset and surrounding counties. It has examples of high profile investment such as Sunseekers at Osprey Quay in Portland where it will develop a new facility to construct super yachts. The Nathanial Lichfield Study also identifies good prospects for manufacturing and engineering at the Airport and their assessment of the sub regional economy identified strong demand for industrial premises (B1c), (B2). Poole Borough Council also report manufacturing growth significantly above national and regional levels, with manufacturing industry by employment increasing from 15.3% to 16.5% between 2005 – 06, whereas they report that the level fell to 11.4% in the south west and 10.9% nationally in 2006.

INDUSTRIAL ENQUIRIES

3.27 As noted above under Office Enquiries the only information on commercial enquires covering the entire study area is held by the Property Pilot, however there are concerns from the Local Authorities that the use of Evolutive information may lead to double counting in light of searches covering more than one type of land or premises under a single search. Therefore the following information is used to provide an illustration of enquiries only and is not used for the methodology later in this report. In terms of the levels of enquires for industrial floorspace and land, the Property Pilot covering the study area indicates the following enquires over the period (01 Jan 2007 – 30 April 2008):

- **Craft / Studio / Workshop**: 312 enquiries amounting to total required floorspace of 473,513.4sq.ft. (43,989.39 sq.m.) including 207 enquiries between 0-999 sq.ft., and 77 enquires between 2000 – 4999 sq.ft.
- **Industrial**: 500 enquires amounting to 2,289044.04 sq.ft. (212652.19 sq.m.) total floorspace, with small to medium unit sizes dominating requirements (173 no. for units 0-999 sq.ft., and 231 no. for units 2000 – 4999 sq.ft.). Five enquires were made for units 50001 – 100,000 sq.ft. and the largest enquiry in the study area being made for 130,000 sq.ft.
- **Light Industrial**: 589 enquiries amounting to 1,793196.80 sq.ft. (16,6587.98 sq.m.) with enquires for small to medium sized units dominating again (251 no. for 0-999 sq.ft. and 273no. for 2000 – 4999 sq.ft.).
- **Warehousing**: 248 enquiries amounting to 1,436038.8 sq.ft. (133,408 sq.m.) with the majority of requirements being under 5,000 sq.ft. (76 no. for 0-999 sq.ft, 115 no. for 2,000 – 4,999 sq.ft). Limited interest is demonstrated for what could be classified as large strategic sheds with only 4 requirements for 50,0001-100,000 sq.ft. and a single requirement for a 130,000 sq.ft unit. This demonstrates low demand for units of what agents would classify as being large enough for a regional distribution hub being 100,000 sq.ft plus.
- **Land**: 13 enquiries have been made for land (the use for which is not specified) amounting to 51.591 acres (20.88 hectares), 6 of which fall within the band of 1-2.49 acres and the largest 2 requirements falling within the band of 10-19.99 acres. 11 enquires were also made for serviced land amounting to 48,591 acres (19.66 hectares) the breakdown of which is largely similar to the general land enquires.

3.28 In terms of enquiries received by agents, one of the main local agents we spoke to has witnessed demand over the past 5 years from the B8 sector steadily increasing so that now this sector accounts for nearly 50% of all their enquiries. The agents also highlight the historic perception that B8 use has always been associated with low employment levels, however, many of the current B8 uses are employment creating such as the employment of drivers rather than staff within the properties.

3.29 One of the key local agents we spoke to also reported that they have noticed of late a slight increase in the demand for B2 premises indicating would appear that the number of manufacturing companies has shown modest growth. Another agent confirmed demand was reasonable for B2 and in fact felt there was a good split within the BDP area for all B use class requirements.

3.30 In terms of tenure, feedback from local agents has indicated that over the past 5 years demand has been predominantly for freehold, however of late with the difficulties in obtaining finance and the peeking of freehold prices, they are now experiencing a greater demand for leaseholds and this is helping to increase rental levels. One local agent highlights recent demand for pre-let design and builds for 15 year leases with 10 year tenant break options for units of between 10,000 and 30,000 sq ft.

INDUSTRIAL AVAILABILITY

3.31 In terms of industrial availability, the Lambert Smith Hampton National Industrial and Distribution Report 2008 shows approximately 30,000 sq.ft. of new or refurbished space and approximately 315,000 sq.ft. of second hand space within Poole and Bournemouth. Their report identified no recorded space under construction within the conurbation.

3.32 As of May 2008 the Property Pilot for Bournemouth Poole and Dorset indicated the following availability by no. of units or sites as shown in Table 5.

Table 5 – Industrial Land and Premises Availability

	Craft / Studio/ Workshop	Industrial	Land	Light Industrial	Serviced Land	Storage Land	Warehousing	Total
Bournemouth	0	14	0	0	0	1	5	20
Christchurch	0	20	1	4	0	0	0	25
East Dorset	0	31	0	1	0	2	6	38
North Dorset	8	22	0	3	3	0	0	46
Poole	16	62	1	13	2	0	2	96
Purbeck	0	19	2	1	0	0	0	22
West Dorset	4	40	3	15	1	2	4	69
Weymouth & Portland	0	8	2	3	1	1	2	17

Source BDP Property Pilot (21/5/08)

3.33 The noticeable trends within Table 5 again highlight the different roles of Bournemouth and Poole in terms of industrial characteristics with Poole providing the choice of available industrial accommodation. Weymouth and Portland, Christchurch and Purbeck appear to have extremely low levels of stock choice.

3.34 Feedback from local agents has confirmed that most estates within the Bournemouth and Poole area are currently experiencing very high occupancy levels. One local agent confirmed some landlords with a large number of properties such as Bournemouth Airport and Birchmere have between 93 and 100% occupancy.

3.35 Cowling and West report a significant shortage of available stock which they attribute to a lack of deliverable land coming forward and the issues of allocations versus land ownership aspirations, one example being land at Verwood which was retained for expansion of Manitou. A further cited example was a 10 acre plot at Holton Heath which has been on the market for a significant period of time with delay being attributed to planning restrictions linked to highway infrastructure requirements (this site is discussed further within section B). Other local agents report a reasonable supply of land, although again they believe it is not readily available ie. where owners hold out for uses which are higher value than industrial/warehouse including trade counter, car showroom or retail warehouse. Often other landowners have no need to develop or are prepared to wait for exactly the right type of tenant and use.

3.36 Despite the perception from local agents that there is a reasonable supply of industrial, responses suggested that there is an acute shortage of large sites capable of accommodating large inward investment enquiries or major local expansions. Such sites generally require good access to principal roads. Agents also report many occupiers complaining that there are a very limited number of sites which are actually suitable for the expansion of their businesses and which can offer the correct location and flexibility of size, tenure and design. It is worth highlighting that the Nathanial Litchfield Airport Study highlights an apparent shortage of opportunities in the Bournemouth-Poole-Christchurch conurbation which demonstrates that potentially supply is not evenly distributed across the BDP area. This issue is discussed further in chapter 6 of this report.

EMPLOYMENT LAND COMPLETIONS

3.37 The adopted Structure Plan (2000) allocated 118 hectares of employment land for the period 1994 – 2011 for the four South East Dorset Districts (Bournemouth, Christchurch, East Dorset and Poole). By 2001, around 49 hectares of this land had been developed (South East Dorset Strategy SED07 Economy November 2005) which equates to 42% of the Structure Plan allocation. Further more the document confirmed that there was over 190 hectares of employment land either with planning permission or allocated in South East Dorset, however this includes significant amounts of land at the Airport which as noted within the Policy section has delivery issues.

3.38 The following table shows all land developed for employment use within the BDP study area between October 1994 and September 2003 as extracted from the Employment Land Monitoring Report 2004 (Bournemouth BC, Poole BC and Dorset CC).

Table 6 – Employment Land Take-Up 1984 – 2007

	Land Developed 1994 – 2007 (ha)
Bournemouth	13
Christchurch	15
East Dorset	21
North Dorset	39
Poole	45
Purbeck	9
West Dorset	41
Weymouth & Portland	16
BDP Total	199

Source: Bournemouth, Dorset and Poole Strategic Authorities

UNFULFILLED DEMAND

3.39 In terms of unfulfilled demand, one local agent reported a number of companies that require long term open storage land, but available land is for short term use whilst developers wait for the right enquiries or the grant of planning permission.

3.40 A key local agent reported enquires from a number occupiers looking to purchase small plots of land of less than 1 acre. However, whenever land is available it is owned by developers who, having paid a high market price for sites, can only make a return by developing the land rather than selling smaller plots. Those developers that will sell land have to charge a premium above market price to ensure that they obtain a return. This has the effect of reducing demand and affordability.

3.41 When looking at pressures from non-B class uses agents reported demand from education, health and hotel operators for industrial/warehouse sites. Requirements for student accommodation on office sites (i.e. Bournemouth), as well as on going enquires for motor dealerships and self storage on employment land have also been reported.

3.42 With regard to warehouse and distribution operations the local agents highlighted that B8 companies need sites with good access to A and M roads and within the study area, with the exception of locations such as Concept Park, Hamworthy Combustion and the Nuffield Industrial Estate there are very few sites that can offer a solution.

3.43 One agent highlighted the issue of flexible planning use class provision. Purchasers are wary of purchasing a building which has exclusive B1 use or B2 or B8 use. Accordingly, purchasers ideally want sites/buildings with at least B1 and B8 use even if they only want to use B1. This means there is more flexibility when selling on, so that marketing takes place to the widest possible audience. Accordingly, demand for only B1 or only B8 sites/units is lower.

3.44 A further key concern from the local agents is the problem with the lack of supply of sites leading to virtually unsustainable prices having to be paid which in turn has led to developers not being able to economically develop traditional industrial/warehouse units. Developers successfully purchasing plots have to pay a premium and as a consequence, in order to make a profit, have to concentrate on higher value uses such as trade counters and offices. Developers have demonstrated that with recent land prices they cannot make a profit building standard industrial/warehouse units at market rents/prices unless they build very small units and quote near unsustainable prices/rentals. It is perceived that an increase in the supply of land would reduce the pressure on land prices and allow a greater range of industrial/warehouse buildings to be built.

3.45 Other external market factors influencing supply highlighted by local agents include the introduction of empty business rates which has substantially reduced the demand from developers to speculatively develop space. Those developers that are still interested in speculative development will now phase the development to reduce exposure to payment of empty rates. This is likely to substantially slow the supply of valuable new stock and reduce the value of the land due to the increase in development costs resulting from phasing.

MARKET ASSESSMENT SUMMARY

3.46 The property market within the BDP study area comprises a number of distinct sub areas including an office centre in Bournemouth and industrial market in Poole with notable supporting roles from the significant industrial estates at the Airport, Ferndown and Holton Heath. Weymouth, Portland and Dorchester also comprises its own property market serving the needs of its catchment. The more rural parts of the County comprise largely of sites meeting their local property market requirements although anomalies such as Winfrith provide for business's over and above their local catchment.

3.47 Key findings from Agents indicate a deliverability problem with offices in Bournemouth in light of depressed rental values, and a real concern of the perception of sub-region's infrastructure from inward investors particularly when compared to the likes of Southampton and Portsmouth.

3.48 There appears to be a reasonable level of availability across the Districts with agents and the Property Pilot also reporting steady increase in B8 enquiries and recent slight increase in B2 space enquires. However, whilst there is considered to be a reasonable supply of land, agents report that it is not readily available, and there is a perceived shortage from agents of large sites capable of accommodating large inward investment enquires or major local expansions. In terms of tenure, agents also indicate that traditionally demand has predominantly been for freehold premises however this is now reverting to leasehold in light of difficulties in obtaining finance. The general consensus is also one of high levels of occupancy within existiindustrial estates across the study area.

4. SOCIO-ECONOMIC CONTEXT

4.1 The socio-economic analysis focuses on a selection of key labour market and sector indicators to provide the socio-economic context for the Workspace Strategy. These include:

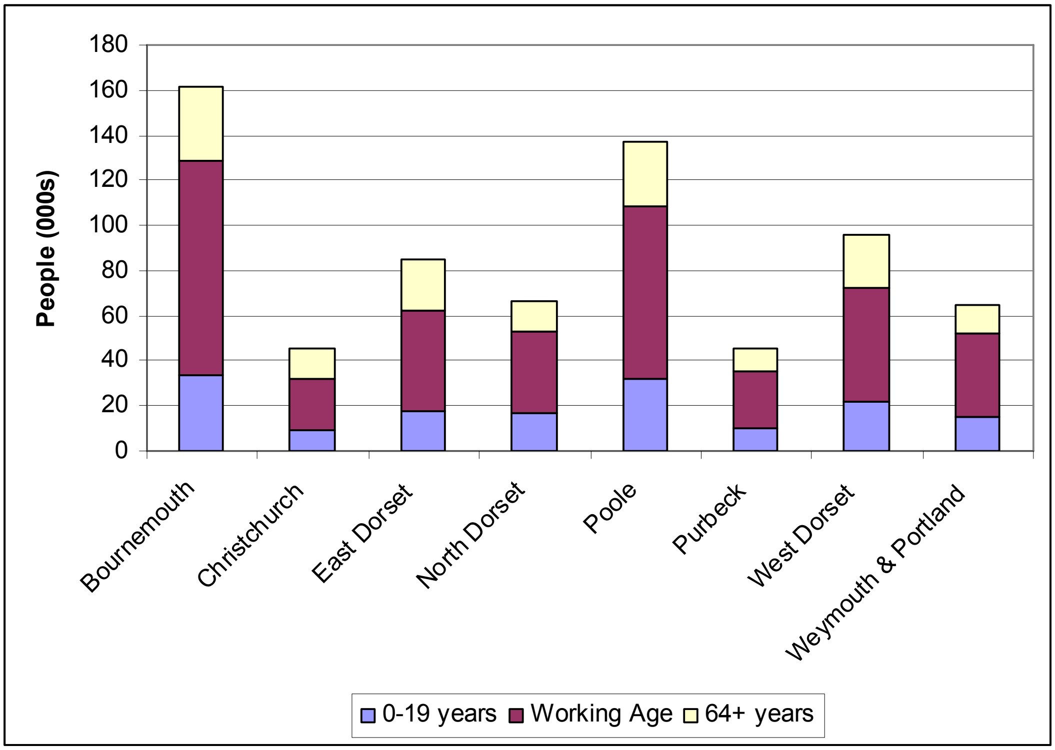
- Population: current and projected figures by age
- Economic activity rates
- Unemployment rates
- Occupational levels
- Skills levels
- Sector analysis
- Employment projections (by sector)

LABOUR MARKET

POPULATION

4.2 There is a total population of about 700,000 in the Bournemouth, Dorset and Poole sub-region. Bournemouth (161,000) and Poole (137,000) are the authorities and together account for 43% of the population in the sub-region. West Dorset (96,000) accounts for 14% of the sub-regions population followed by East Dorset (85,000, 12%). North Dorset (66,000), Weymouth & Portland (65,000), Christchurch (45,000) and Purbeck (45,000) all account for less than 10% of the sub-regions population each as shown Figure 2.

Figure 2 – Population



Source: ONS: 2006-based Subnational population projections

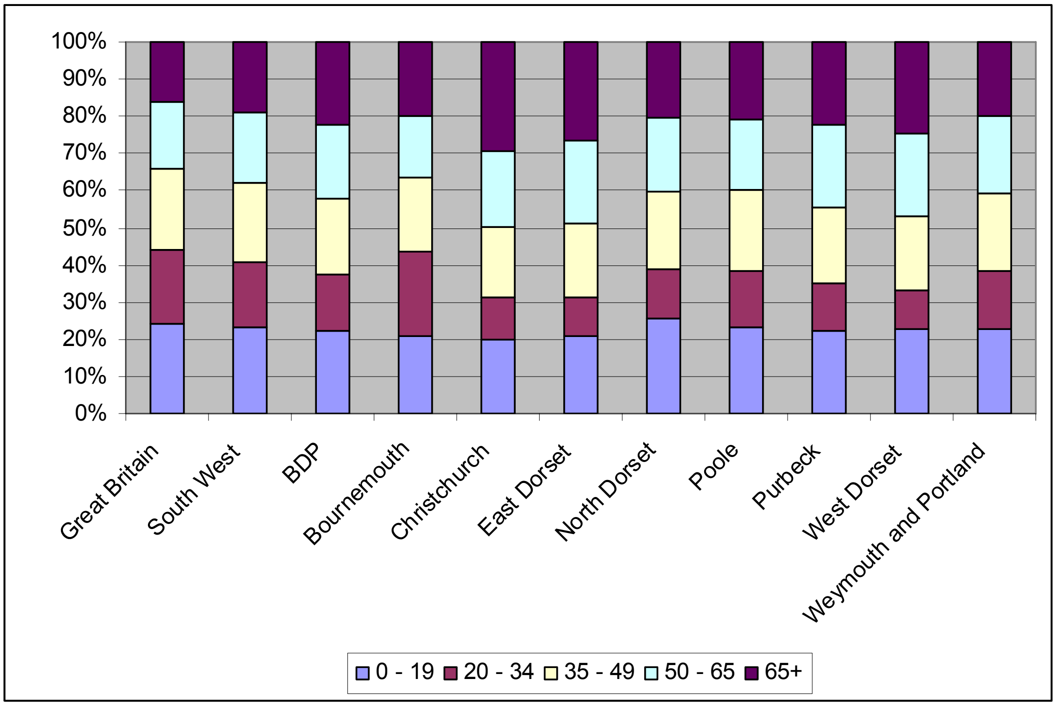
4.3 Overall the sub-region has in economic terms not very favourable age distribution compared with the regional and national average. The sub-region has a higher proportion of over 65 year olds and a relatively low proportion of the economically important 20 to 34 age group. However the picture across the sub-region is quite diverse as shown in Figure 3.

4.4 Bournemouth age distribution seems to be the healthiest. The proportion of over 65 year olds is in line with the national and regional average and the proportion of the 20 to 34 age group is higher than the national and regional average most likely due to its student population.

4.5 North Dorset, Poole, Purbeck and Weymouth & Portland have a age distribution similar to the regional average, although in all four districts the 20 to 34 age group is somewhat underrepresented compared to the regional average.

4.6 Christchurch, East Dorset and West Dorset have the least favourable age distribution with a high proportion of over 65 year olds and a relatively low proportion of 20 to 34 year olds.

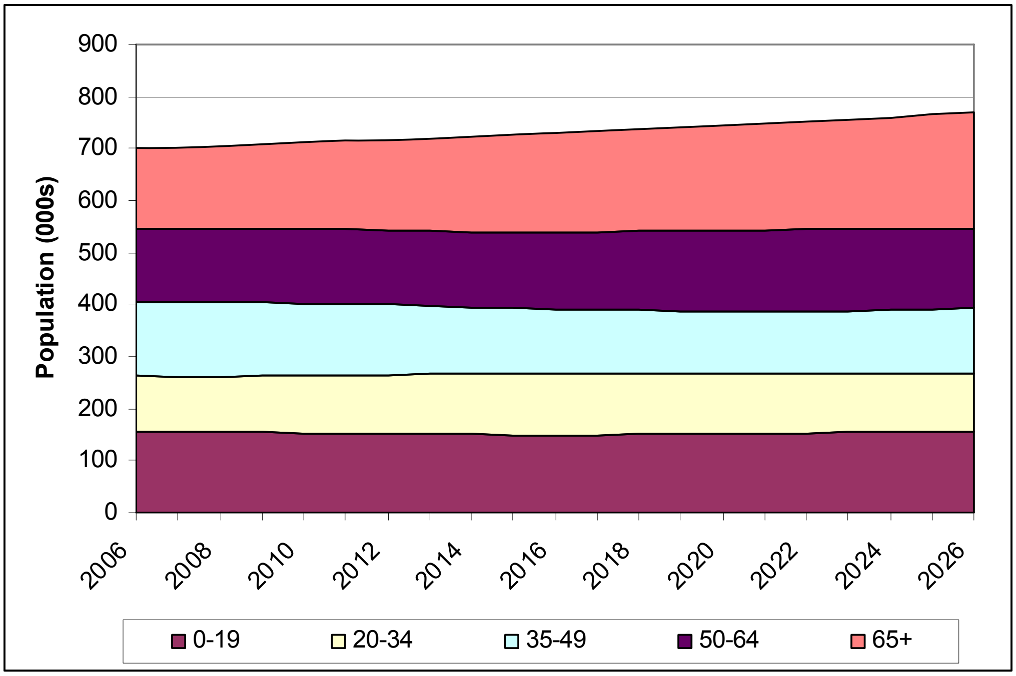
Figure 3 – Population by Age



Source: Mid-Year Population Estimate

4.7 The population in the sub-region is projected to increase by 60,000 between 2006 and 2026 as shown in Figure 4 and Table 7. Of these only 3,800 are projected to be in the 20 to 64 age group.

Figure 4 – Population Projections: Bournemouth, Dorset, Poole



Source: ONS: 2006-based Subnational population projections

4.8 The Bournemouth and North Dorset have the highest level of projected population growth in the 20 to 64 age group between 2006 and 2026 with 3,800 and 2,700 respectively. In Poole the population of the 20 to 64 year old is projected to decline by 2,900 in the same time period. In the remaining districts the working age population (20 – 64 age group) is projected to stay roughly the same between 2006 and 2026 (see Table 7).

Table 7 – Population Changes 2006 – 2026

Age Groups	BDP	Bournemouth	Christchurch	East Dorset	North Dorset	Poole	Purbeck	West Dorset	Weymouth & Portland
0 – 19 years	-600	-300	600	-700	1400	-600	-800	0	-200
20 – 34 years	6,100	1,700	200	400	500	1,200	1,300	200	600
35 – 49 years	-18,000	-2200	-1,700	-4,200	800	-4,700	-1,200	-3,400	-1,400
50 – 64 years	12,700	1,200	600	1,500	4,000	400	500	2,800	1,700
65+ years	67,000	5,300	41,00	10,200	10,000	9,400	5,300	15,600	7,100
All	**67,200**	**5,700**	**3,800**	**7,200**	**16,700**	**5,700**	**5,100**	**15,200**	**7,800**

Source: ONS: 2006-based Subnational population projections

4.9 These demographic population projections need to be reflected in the light of the housing targets for the sub-region. The RSS suggest 54,000 additional housing units between 2006 and 2026. The Panel report has recommended an increase of the housing target to 66,200 additional housing units. Based on a rough estimate[5], this could provide an additional population of 80,000 to 100,000 depending on the actual housing growth. This could result in an increase of population growth in the 20 to 64 age group to 7,000 or 17,000 respectively. If the working age is assumed to increase to 69 by 2026 the increase in the working age population would further increase to 31,000 or 32,000 respectively.

ECONOMIC ACTIVITY

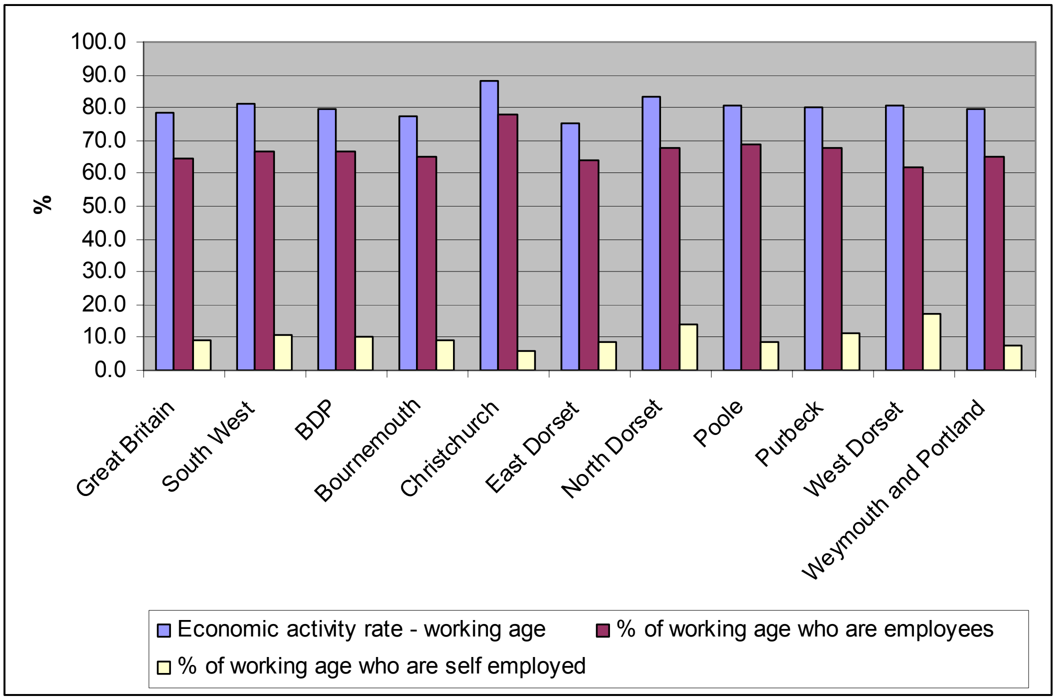
4.10 The economic activity rate in the sub-region is slightly above the national average and just below the regional level. However, there is again a diverse picture across the sub-region as shown Figure 5.

4.11 Christchurch and North Dorset have an economic activity rate above the sub-regional average, whereas Bournemouth and East Dorset's economic activity rate is below the sub-regional level. The economic activity rate in Poole, Purbeck, West Dorset and Weymouth & Portland is in line with the sub-regional average.

4.12 West Dorset and North Dorset have a markedly higher proportion of residents who are self employed than the regional and sub-regional average.

[5] Due to declining household sizes, new dwellings will not only provide housing for a new incoming population but will also be occupied by existing households which downsize. A rule of thumb, based on our extensive experienced in estimating population increases as a result of additional housing, is that for each new home a population increase of 1.5 can be expected.

Figure 5 – Economic Activity Rate

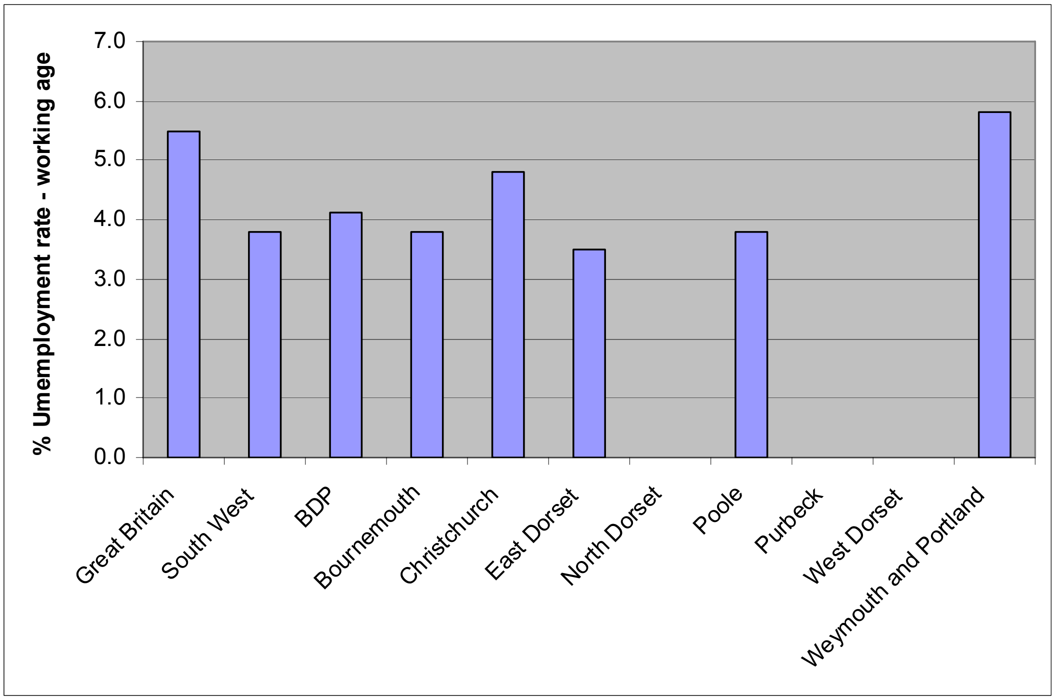


Source: Annual Population Survey, Jan – Dec 2006

4.13 The unemployment rate in the sub-region is at 4% below the national average (5.5%)[6], but above the regional average (3.8%) as shown in Figure 6. Again the picture within the sub-region is fairly diverse. Weymouth & Portland and Christchurch have a relatively high unemployment rate of 5.8% and 4.8% respectively compared to the sub-regional average of 4.1%. Bournemouth's and Poole's unemployment rate is below the sub-regional average and in line with the South West's average at 3.8%. East Dorset' unemployment rate (3.5%) is below the regional average.

[6] The 2006 Annual Population Survey (latest available data) does not give unemployment rates for North Dorset, Purbeck and West Dorset.

Figure 6 – Unemployment Rate



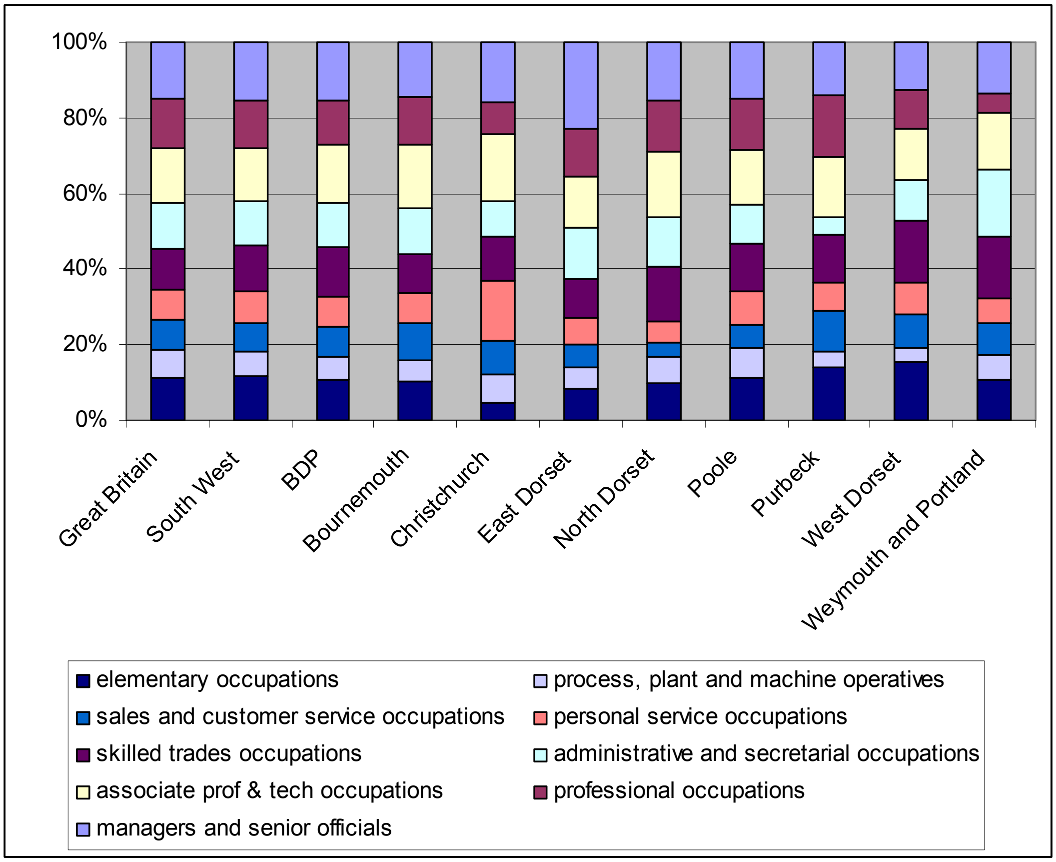
Source: Annual Population Survey, Jan – Dec 2006

OCCUPATIONAL LEVELS AND SKILLS

4.14 Occupational levels in the sub-region are broadly in line with the national and regional average.

4.15 East Dorset, North Dorset and Purbeck have a notably high proportion of residents in high level occupations (managers & senior officials, professional occupations and associate professionals and technical occupations). In contrast West Dorset and Weymouth & Portland have relatively few residents in high level occupations compared to the national and regional average. High level occupations in Bournemouth, Christchurch and Poole are in line with the national and regional average as shown in Figure 7.

Figure 7 – Occupational Levels



Source: Annual Population Survey

4.16 Sub-region's skills levels are in line with the Regional average. They compare well with the national average with more people having NVQ 3 and higher qualifications (NVQ 3+) in the sub-region and than nationally and fewer people having no or other qualifications (see Figure 8).

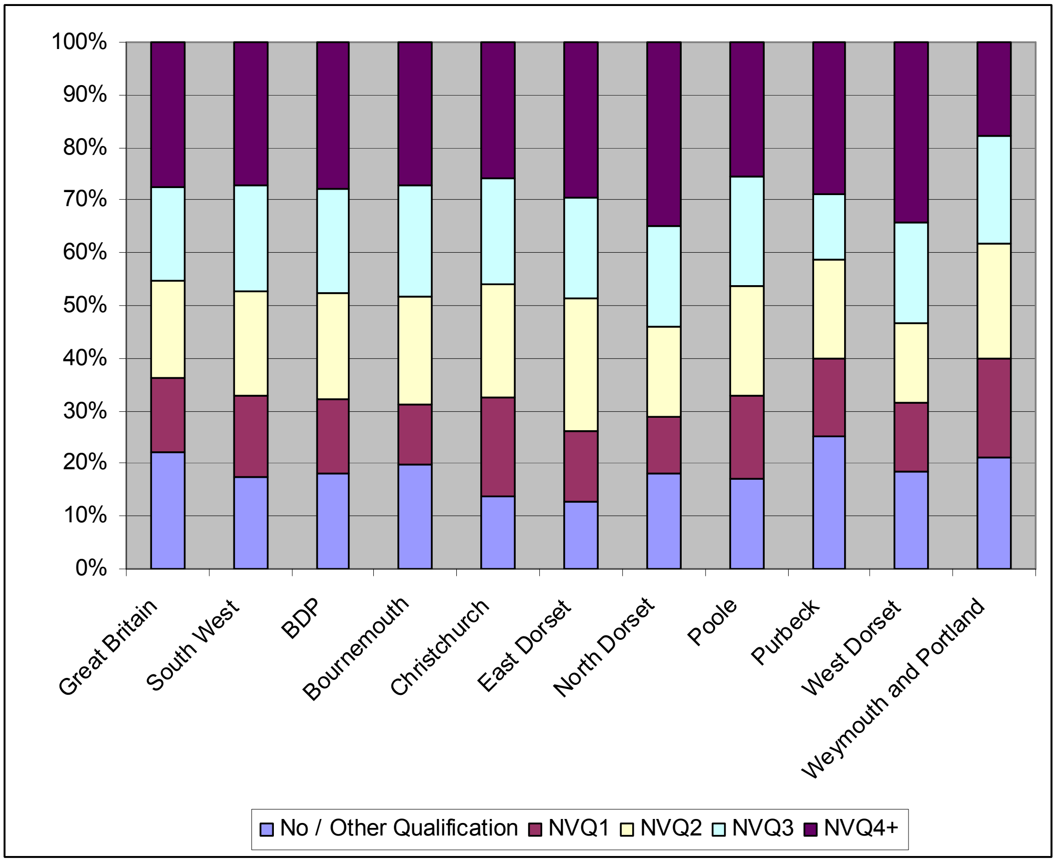
4.17 North Dorset and West Dorset have a markedly higher proportion of residents with NVQ 3+ then the sub-regional average. North Dorset also has lower proportion of residents with no or other qualifications.

4.18 Purbeck and Weymouth & Portland have a lower than average proportion of residents with NVQ 3+ and higher proportions of residents with no or other qualifications.

4.19 Christchurch and East Dorset have fewer residents with no or other qualifications compared to the sub-regional average and similar proportions of residents with NVQ 3+ as the sub-region.

4.20 Bournemouth and Poole have similar skills levels as the sub-region as a whole.

Figure 8 – Skills Levels



Source: Annual Population Survey

SUMMARY

4.21 Overall the sub-region compares relatively well in labour market terms with regional and national averages:

- The sub-region has a lower proportion of working age residents (20 to 64 age group) than the Region as a whole.
- Economic activity levels in the sub-regions are in line with the national and regional average.
- Unemployment rate in the sub-region is slightly above the regional average but well below the national level.
- Occupational and skills levels in the sub-region are in line with the regional average. The skills levels in the sub-region and the Region compare positively to the national average.

4.22 However, the performance within the sub-region across the different labour market indicators is quite varied. Table 8 gives an overview of the performance of the individual districts in comparison to the sub-regional average across four selected labour market indicators.

4.23 Only North Dorset performs above average in all four selected labour market indicators. West Dorset over performs the sub-regional average in two of the four labour market indicators.

4.24 East Dorset and Weymouth & Portland perform in two of the four indicators below the sub-regional average.

4.25 The remaining local authorities (Bournemouth, Christchurch, Poole and Purbeck) perform similar to the sub-regional average with one indicator being above and/or below the sub-regional average.

Table 8 – Labour Market Analysis Summary

	Working age population growth	Economic Activity Rate	Proportion of residents in higher level occupations	NQ 3+
Bournemouth	+	-	0	0
Christchurch	0	+	0	0
East Dorset	-	-	+	0
North Dorset	+	+	+	+
Poole	-	0	0	0
Purbeck	0	0	+	-
West Dorset	+	0	-	+
Weymouth & Portland	0	0	-	-

Key: + *above sub-regional average*
0 *similar to sub-regional average*
- *below sub-regional average*

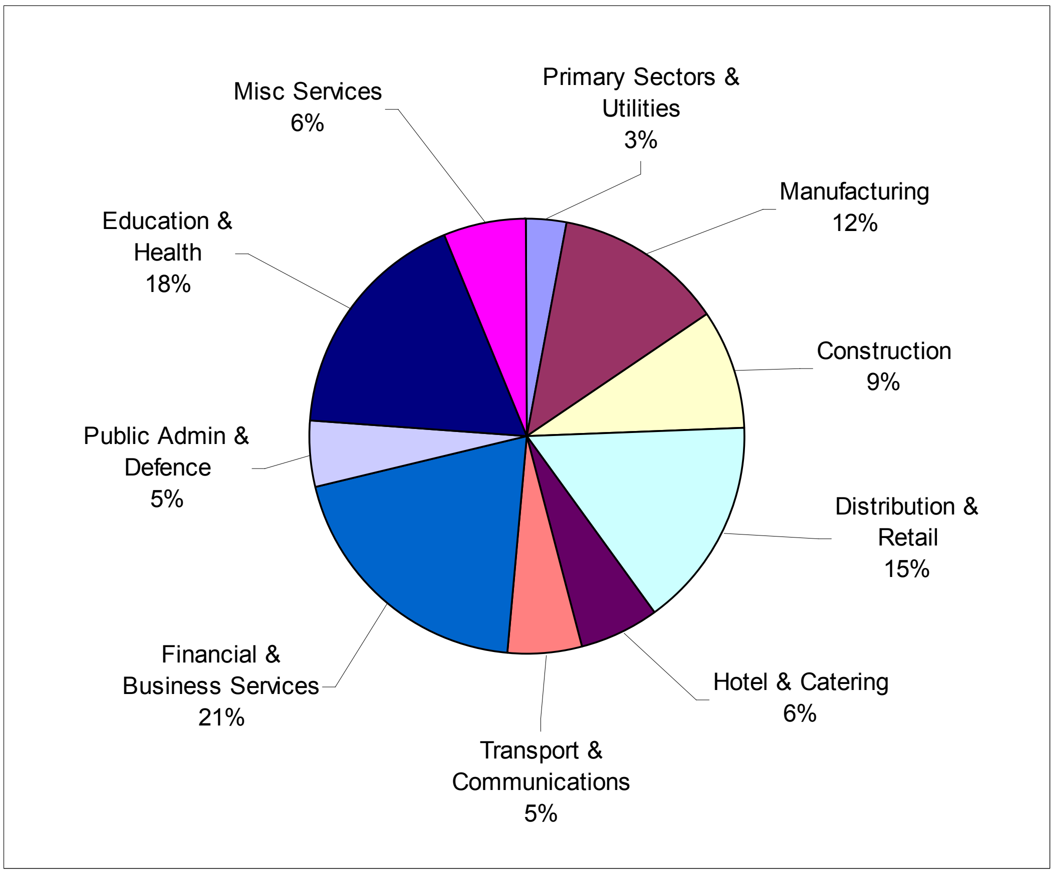
4.26 A key finding of the labour market analysis is the labour market constraints with modest growth projections of 3,800 of working age (20 to 64 age group) residents in the sub-region between 2006 and 2026. This indicates that economic growth (in GVA terms) has to be driven by an increase in value added rather than pure employment growth.

SECTOR ANALYSIS

CURRENT SECTOR DISTRIBUTION

4.27 The South West Region has a well balanced sector distribution which overall has transformed into a service sector economy. In general the South West's sectoral employment distribution is in line with the national picture. Financial & Business Services (21%) is the biggest sector followed by Education & Health (18%) and Distribution & Retailing (15%). The Primary & Utilities, Manufacturing and Construction sectors together account for just below a quarter of employment within the region as shown in Figure 9.

Figure 9 – Sector Distribution South West Region



Source: Experian Business Services

4.28 The sub-regions sector distribution is very much in line with the Region. The most notable differences are the higher proportion of Distribution & Retail employees (18% in the sub-region compared to 15% in the Region) and Hotel & Catering employees (9% in the sub-region compared to 6% in the Region). The largest sector in the sub-region is Education & Health as shown in Figure 10.

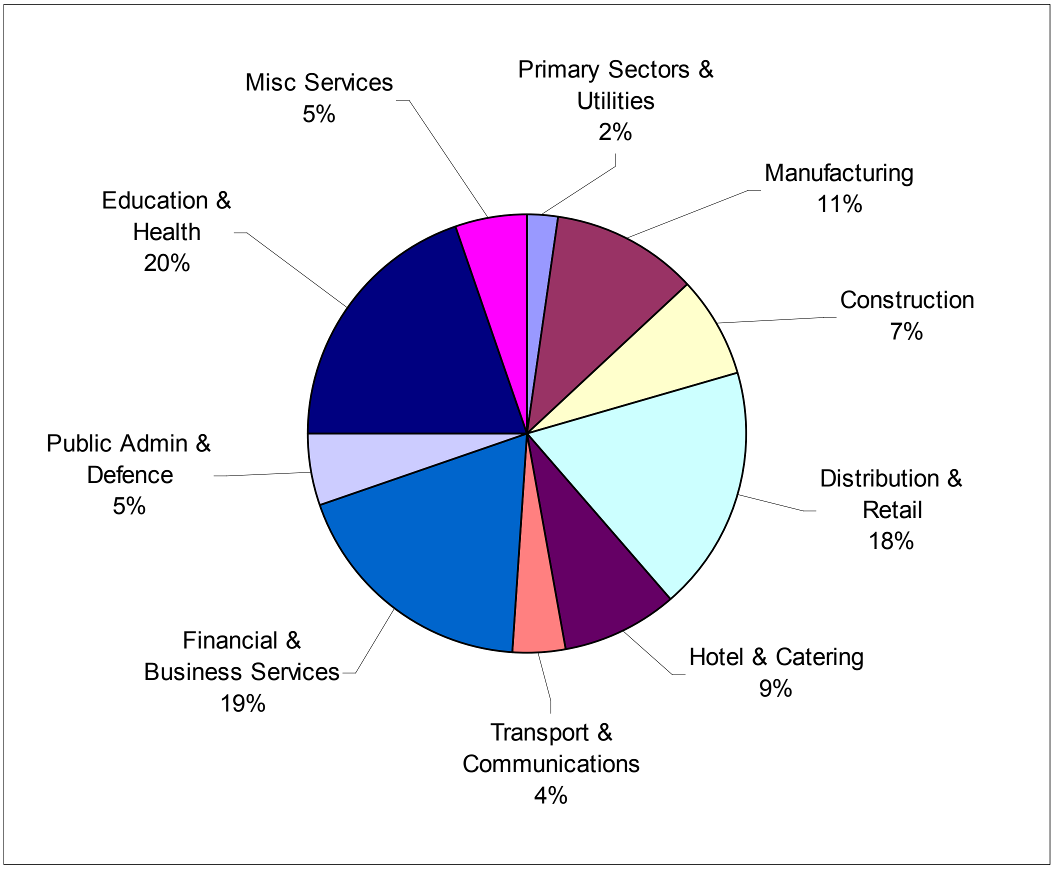
4.29 Within the sub-region Bournemouth TTWA has – as expected – a relatively high proportion of Financial & Business Services (23.6% compared to 18.7% in the sub-region) and a relatively low proportion of employment in manufacturing (8.9% compared to 10.8%) as shown in Table 9.

4.30 The Poole TTWA has a relatively high proportion of manufacturing employment (13.4%) compared to the sub-region (see Table 9).

4.31 The Dorchester & Weymouth TTWA has quite a different sectoral makeup than the overall sub-region. Its economy is highly dependent on the public sector. The public sector (Public Administration & Defence and Education & Health) in the Dorchester & Weymouth TTWA accounts for 38.2% of all employment in the TTWA compared to 24.9% in the sub-region as a whole. Financial & Business Services, Distribution & Retail and Manufacturing are underrepresented in the TTWA compared to the sub-region (see Table 9).

4.32 North Dorset, which is not part of a TTWA, has a more rural economy. Employment in Primary Sectors & Utilities, Manufacturing and Construction is above the sub-regional average. Employment in Financial & Business Services is well below the sub-regional average (see Table 9).

Figure 10 – Sector Distribution in the Bournemouth, Dorset, Poole Sub-region



Source: Cambridge Econometrics

Table 9 – Sector Distribution by TTWA

	BDP	Bournem' TTWA	Poole TTWA	Dorchester & Weymouth TTWA	Non TTWA
Primary Sectors & Utilities	2.4%	1.4%	2.9%	2.8%	3.7%
Manufacturing	10.8%	8.9%	13.4%	7.3%	16.1%
Construction	7.4%	7.2%	7.1%	6.3%	10.0%
Distribution & Retail	18.0%	18.8%	18.4%	15.2%	18.4%
Hotel & Catering	8.6%	9.6%	7.5%	9.3%	7.3%
Transport & Communications	3.8%	4.6%	3.8%	2.5%	2.7%
Financial & Business Services	18.7%	23.6%	18.1%	13.6%	10.1%
Public Admin & Defence	5.3%	2.2%	4.2%	16.0%	4.2%
Education & Health	19.6%	19.0%	18.1%	22.2%	21.6%
Misc Services	5.4%	4.6%	6.5%	4.9%	5.9%

Source: Cambridge Econometrics, Annual Business Enquiry, GVA Grimley

PROJECTED EMPLOYMENT CHANGES

4.33 Employment in the sub-region has grown by 67,600 employees between 1986 and 2006, which equates to an increase by 24% or 1.1% per annum. The growth has not been distributed equally across the sub-region with the Dorchester & Weymouth TTWA falling well below the average with a growth rate of 0.5% per annum as shown in Table 10.

4.34 South West RDA has assumed in its Regional Economic Strategy the regional economy to grow by 3.2% per annum in terms of Gross Value Added (GVA). Under this assumption employment is projected to grow by 54,800 between 2006 and 2026 in the sub-region. This equates to an increase by 15.9% or 0.7% per annum. The future employment growth is projected to be proportionally distributed across all TTWAs with growth rates between 0.7% and 0.8% in all the TTWAs and in North Dorset (Non TTWA).

Table 10 – Employment Growth by TTWA (3.2% GVA increase pa)

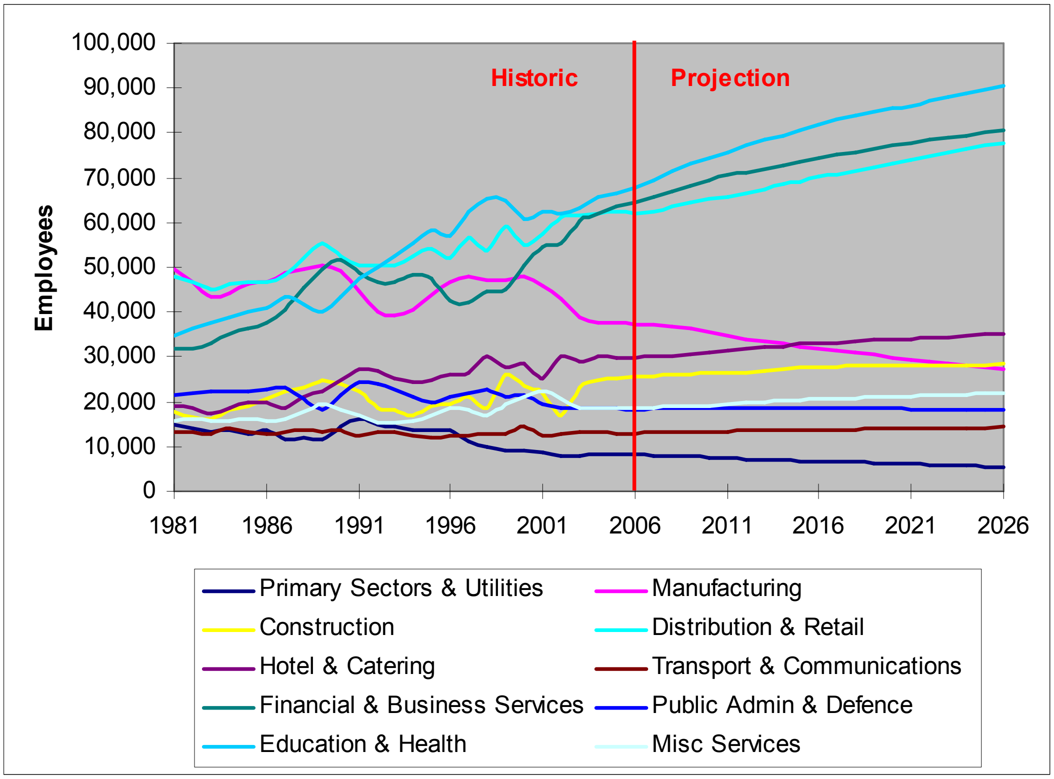
	1986 - 2006			2006 - 2026		
	#	%	% pa	#	%	% pa
Bournemouth TTWA	30,152	25.7%	1.2	22,738	15.4%	0.7
Poole TTWA	21,808	30.1%	1.3	15,435	16.4%	0.8
Dorchester & Weymouth TTWA	5,505	10.6%	0.5	9,491	16.5%	0.8
Non TTWA	10,135	28.6%	1.3	7,136	15.7%	0.7
BDP	67,600	24.4%	1.1	54,800	15.9%	0.7

Source: Cambridge Econometrics

4.35 The Education & Health sector is projected to grow the most (in absolute and relative terms) and will stay the largest sector in the sub-region. Financial & Business Services and Distribution & Retail are also projected to grow significantly between 2006 and 2026 (see Figure 11 and Table 11). These three sectors will together account for 62% of employment in the sub-region. Of these three high growth sectors only the Financial & Business Services and the Distribution part of the Distribution & Retail sector requires traditional B-Use-Class land. Education & Health and Retail are predominantly not located on B-Use-Class land.

4.36 Employment in Manufacturing, Primary Sectors & Utilities and Public Administration & Defence is projected to decline between 2006 and 2026. In absolute terms employment in Manufacturing will account for the largest loss with 10,200 fewer jobs predicted in 2026 than in 2006. The sector (currently the fourth largest) will fall below Hotel & Catering and Construction in employment terms by 2026 (see Figure 11 and Table 11). The projected loss in manufacturing employment will reduce demand for employment land in the future.

Figure 11 – Employment Projections by Sector



Source: Cambridge Econometrics

4.37 According to Cambridge Econometrics the projected growth patterns between 2006 and 2026 are similar across the different TTWAs. However, there are some notable exceptions (see Table 11):

- Financial & Business Service sector is projected to grow in relative terms the most in the Non TTWA[7] (35%) and in the Poole TTWA (34%) and the least in the Bournemouth TTWA (21%) which currently has the highest proportion of employment in this sector.
- Employment in Distribution & Retailing is projected to grow in relative terms the most in the Dorchester & Weymouth TTWA (39%) and the least in the Bournemouth TTWA (21%).
- In the Poole TTWA employment in the Transport & Communications is projected to stay stable between 2006 and 2026.
- Employment in Education & Health is projected to grow the least in the Dorchester & Weymouth TTWA, which currently has the highest proportion of employment in this sector.

[7] This mainly North Dorset.

Table 11 – Employment Projections by Sector and TTWA

	BDP		Bournemouth TTWA		Poole TTWA		Dorchester & Weymouth TTWA		Non TTWA	
	#	%	#	%	#	%	#	%	#	%
Primary Sectors & Utilities	-2,700	-33.3	-582	-27.8	-903	-33.1	-522	-33.0	-693	-40.8
Manufacturing	-10,200	-27.3	-4,332	-32.9	-3,119	-24.7	-893	-21.4	-1,857	-25.3
Construction	2,900	11.4	1,315	12.4	349	5.2	385	10.7	851	18.7
Distribution & Retail	15,700	25.3	5,734	20.7	4,602	26.6	3,379	38.7	1,986	23.6
Hotel & Catering	5,300	17.8	1,593	11.3	1,943	27.5	1,000	18.8	763	23.1
Transport & Communications	1,300	10.0	972	14.3	27	0.8	200	14.0	101	8.3
Financial & Business Services	16,400	25.5	7,140	20.5	5,712	33.5	1,938	24.8	1,610	34.9
Public Admin & Defence	-200	-1.1	-108	-3.3	-130	-3.3	-77	-0.8	115	6.0
Education & Health	22,900	33.8	9,966	35.5	6,149	36.0	3,427	26.9	3,358	34.2
Misc Services	3,400	18.4	1,040	15.2	805	13.1	652	23.3	903	33.3
Total	**54,800**	**15.9**	**22,738**	**15.4**	**15,435**	**16.4**	**9,491**	**16.5**	**7,136**	**15.7**

Source: Cambridge Econometrics

SUMMARY

4.38 Overall the sub-region has a well balanced sector distribution. The economy in the sub-region has successfully transformed into a service economy with a notable decline in employment in the Manufacturing and the Primary & Utilities sectors and an increase in Health & Education, Financial & Business Services and Distribution & Retail between 1981 and 2006. This trend is projected to continue to 2026.

4.39 A significant part of the projected employment growth will not require B-Use-Class land as it comes from sectors such as Health & Education and Retail and Hotel & Catering. The loss of manufacturing employment will reduce the demand for B-Use-Class land.

4.40 The employment projections presented in this chapter will be translated into employment land demand in the following chapter as one of the factors influencing future employment land demand.

5. EMPLOYMENT LAND DEMAND PROJECTIONS

INTRODUCTION

5.1 The ODPM guidance on employment land reviews (2004) discusses a range of employment land demand forecasting approaches. However, it does not recommend a preferred methodology. This has resulted in a range of different forecasting approaches being used.

5.2 For the Bournemouth, Dorset, Poole sub-region there are four different existing employment land forecasts to be considered:

1) a forecast as part of the Demand and Supply of Employment Land, Sites and Premises in South West England study (January 2007) by DTZ for South West RDA,
2) a forecast by Dorset County Council, Bournemouth Borough and the Borough of Poole as part of the Employment Land Review process undertaken by the District,
3) the forecast by Dorset County Council, Bournemouth Borough and the Borough of Poole on which the RSS Panel Report is assumed to be based, and
4) a forecast by Roger Tym & Partners as part of their commission by the Regional Assembly.

5.3 Each of these forecasts uses different assumptions and they result in a wide range of demand future land requirements (from 36ha to 229ha). It therefore seems appropriate to fully understand the different approaches to be able to identify a robust and for all parties acceptable employment land demand forecast. A detailed review of the four approaches is given in Appendix C.

5.4 Based on this review and on GVA Grimley's extensive experience in forecasting employment land demand a preferred methodology has been developed for a baseline employment land demand forecast. This baseline forecast will then be further refined in a series of scenarios in Chapter 7. The scenarios take account of the market conditions, economic development aspirations and supply led demand.

5.5 The methodology for the baseline employment land demand is described below.

METHODOLOGY

5.6 The employment land demand is based on three main elements:

1) Allowance for Economic Growth

2) Allowance for Windfall Losses

3) Allowance for Churn

ALLOWANCE FOR ECONOMIC GROWTH

5.7 The allowance for economic growth takes into account the projected employment changes presented in Chapter 4. It is based on a 3.2% GVA increase per annum in line with the RES strong growth scenario.

5.8 The forecast by Cambridge Econometrics distinguishes between 19 economic sectors. Employment in the 19 sectors is converted into employment in four land use types:

- Office (B1a)
- Other Business Space (B1b/c, B2)
- Warehousing (B8)
- Non-B-Use-Class

5.9 For the conversion a matrix has been used which is based on the ODPM Employment Land Review Guidance with some refinements based on 4-digit-SIC analysis of current employment for each district[8]. The conversion matrix assigns a proportion of the employees in each of the 19 economic sectors from the employment forecast to one or more of the four land use types[9].

5.10 As a next step the employment in each of the three B-Use-Class land types (B1a, B1b/c & B2 and B8) is converted into floorspace using the following employment densities which are in line with the ODPM Employment Land Review Guidance:

- Office 18 m^2 per employee
- Other business space 32 m^2 per employee
- Warehousing 55 m^2 per employee[10]

5.11 The floorspace is then translated into land demand using the following plot ratios[11]:

- Office 0.41
- Other business space 0.32
- Warehousing 0.44

[8] A list of the sectors assigned to each of the land use types is provided in Appendix E.
[9] For each district a matrix has been developed assigning economic sectors on a 4-digit-SIC level to one of the four land use types.
[10] Warehousing employment densities typically range between 50 m^2 for general warehousing and 80 m^2 for large scale and high bay warehouses. As large parts of the sub-region are not suitable / attractive for large scale warehousing we have used an employment density only slightly higher than for general warehousing.

5.12 These plot ratios are based on research by Dorset County Council, Bournemouth Borough and the Borough of Poole of completions and outstanding planning consents since 1994 within the sub-region.

ALLOWANCE FOR WINDFALL LOSSES

5.13 The allowance for windfall losses takes into account that a proportion of designated employment land will not be entirely used by B-Use-Class employment. For example we are informed that all of Bournemouth BC's losses have been to residential uses on small dated employment sites situated in predominantly residential areas.

5.14 Land uses such as recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances and where appropriate, be allocated on employment land.

5.15 As discussed in Chapter 4 a significant part of the projected employment growth arises from sectors which have traditionally not been located on employment land such as healthcare, education, hotels and leisure. Recent planning experience has shown that under specific circumstances and where appropriate such uses might locate on employment land. However this has to be monitored carefully to ensure there is enough available land for B-Use-Class employment on employment land.

5.16 Under specific circumstances and where appropriate employment land might also be used for other uses to enable employment development to come forward.

5.17 The allowance for windfall losses also takes into account the need for a flexible supply of employment land. Allowance has to be made for a range of different needs by the economy which might change over the next 20 years.

5.18 To estimate the amount of land needed for windfall losses historic losses have been used as a guideline as reported in the Monitoring Reports of the Districts in the sub-region.

ALLOWANCE FOR CHURN

5.19 Locational and premises needs of businesses change over time. This requires businesses to move. In other cases an existing business might cease its operations and a new business takes over a site for redevelopment. For this to happen smoothly there is a need for certain level of vacant land. This type of demand has been called 'churn' demand or 'frictional vacancy'.

[11] The plot ratio gives the ratio between floorspace and site size. A plot ratio of 0.41 means that there are 4,100 m^2 of floorspace on a 1 ha site.

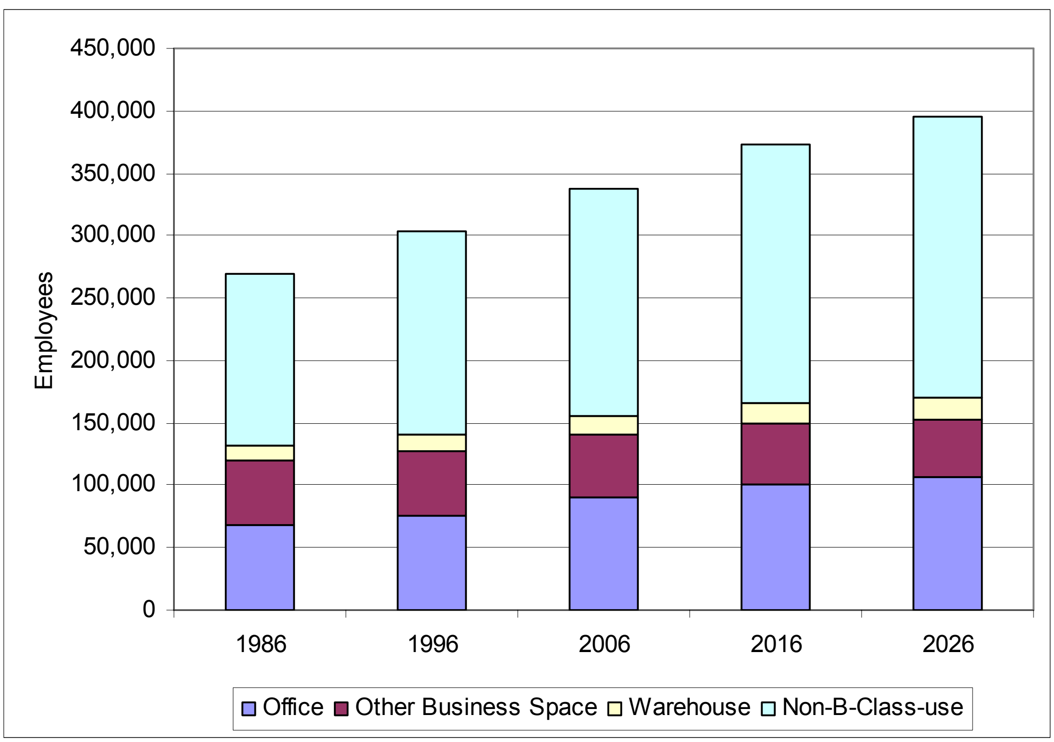
5.20 In our experience it takes typically around two years time for achieving planning consent, site preparation and construction after site has changed hands. To estimate the churn demand we have taken the annual net take-up of employment land and multiplied it by two.

5.21 In the remaining part of this Chapter the data for each of the steps of the baseline employment land demand forecast is presented on a TTWA level. The demand for each district is given in Appendix D.

ALLOWANCE FOR ECONOMIC GROWTH

5.22 Assuming an economic growth scenario of 3.2% GVA growth per annum employment in the sub-region is projected to increase by 57,200 between 2006 and 2026. Converting the employment changes in each economic sector into land use types is the first step for the employment land demand forecast. Figure 12 shows how employment the Non-B-Class-Use land use type contributes the most to future employment growth. Employment in office and warehousing land use types are also projected to grow, however at a much lower level. Employment in the other business space land use type is projected to decline between 2006 and 2026.

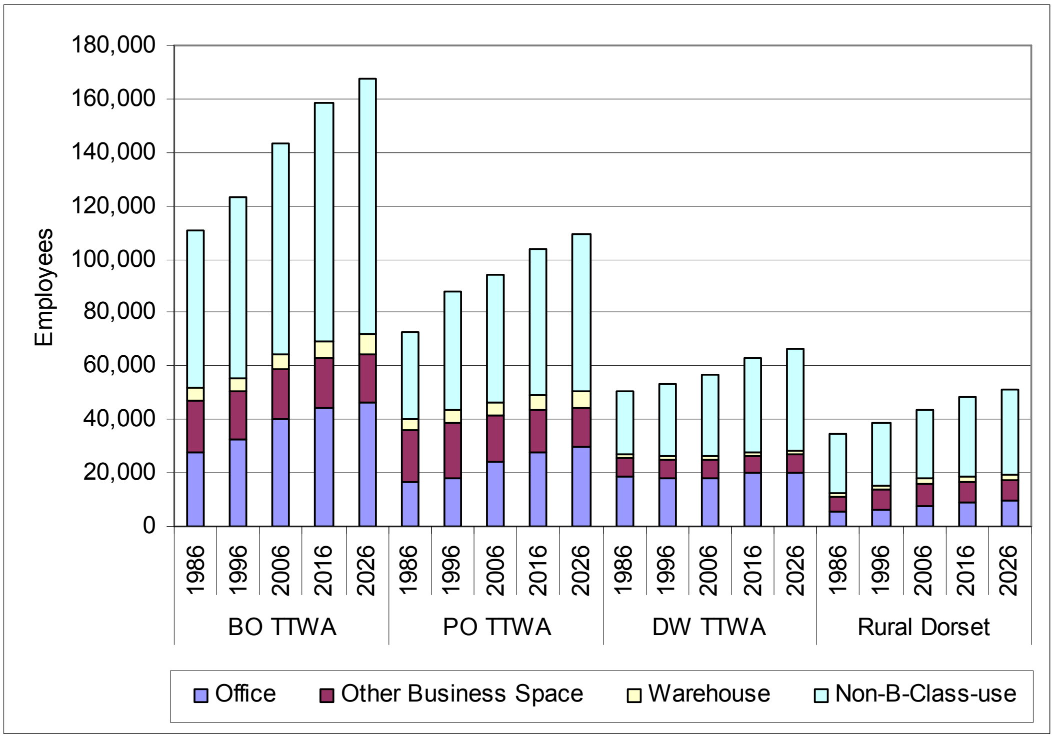
Figure 12 – Employment by Land Use Types



Source: GVA Grimley, Cambridge Econometrics

5.23 Figure 13 shows the employment growth by land use type for each of the TTWAs. The Bournemouth TTWA is not only the largest employment area in the sub-region but also accounts for the largest increase in employment between 2006 and 2026. Figure 13 also shows how office employment in the Bournemouth TTWA and the Poole TTWA is forecasted to grow, whereas employment in this land use type in the Dorchester & Weymouth TTWA and Rural Dorset does not change much in absolute terms.

Figure 13 – Employment by Use-Classes by TTWA



Source: GVA Grimley, Cambridge Econometrics

5.24 As a next step the land demand from the B-Use-Class land types (Office, Other Business Space and Warehouses) is translated into land demand. The land demand from the Non-B-Use-Class land type is not quantified as it is not the focus of the Workspace Strategy. A qualitative assessment and considerations to the spatial implications of the land demand from employment in Non-B-Use-Class sectors is provided at the end of this Chapter.

5.25 Table 12 shows the employment land demand from B-Use-Class employment after translating the employment changes into floorspace using standard employment densities and then into land demand using plot ratios based on historic planning application data from the sub-region.

5.26 The two land use types ‘Other business space’ and ‘Warehouse’ have been aggregated into ‘Industrial’ uses. This is has been done to increase the robustness of the forecast due to the following reasons:

5.27 There is some ambiguity in the conversion of sectors into land use types. Combining the 'Other business space' and 'Warehouse' land use types into one category reduces the ambiguity and increases the robustness of the forecast.

- B2 and B8 premises under the size of 235 m^2 can be transferred from one use into the other without planning application.
- Modern industrial units are often designed to serve both purposes (obviously with the exception of large scale warehouses and distribution centres)
- Both land use types have to a certain degree similar locational requirements.

5.28 For the remainder of the Workspace strategy 'Other business space' and 'Warehouse' are subsumed in the 'Industrial' land use category.

Table 12 – Employment Land Demand from Economic Growth

	BDP	Bournem' TTWA	Poole TTWA	Dorchester & Weymouth TTWA	Rural Dorset
	ha	Ha	ha	ha	ha
Office	70.9	28.8	24.4	9.3	8.5
Other business space	*-40.7*	*-6.7*	*-24.4*	*-2.7*	*-6.8*
Warehouse	*40.1*	*17.2*	*13.0*	*5.1*	*4.9*
Industrial	-0.6	10.5	-11.5	2.4	-2.0
Total	**70.3**	**39.2**	**12.9**	**11.7**	**6.5**

Source: GVA Grimley, Cambridge Econometrics

5.29 Within the sub-region there is a demand for 70 ha of employment land resulting from changes to employment. This demand is entirely a result of increased demand for office space. The additional demand for warehousing space is equalised by a decrease in demand for other business space. To a certain degree these land use types have similar locational and site requirements and the land can be transferred from one use into the other over the next 20 years. However, it is not likely that all the demand for warehousing can be met on land currently occupied by other business space and that there is a need for the allocation of land suitable for distribution purposes (e.g. large sites close to good road infrastructure).

5.30 In the different TTWAs the balance between the increased demand for warehousing and the reduced demand for other business space is not as balanced as in the sub-region as a whole as shown in Table 12. However, if the Bournemouth and the Poole TTWA are taken as a whole, the balance is almost restored with the two TTWAs having a demand for warehousing of 30 ha and a reduced demand from other business space of 31 ha. The balance between the reduced demand from other business space and the increased demand from warehousing in the remaining areas is only off by approximately 3 ha each. This will have to be taken into account when allocating additional employment land.

ALLOWANCE FOR WINDFALL LOSSES

5.31 As discussed above (paragraphs 5.13ff) the allowance for windfall losses has been estimated by using historic data on losses of employment land. Table 13 shows the losses of employment land to other uses by district over the last three years.

Table 13 – Historic Employment Land Losses

	2004/05 ha	2005/06 ha	2006/07 ha
Bournemouth	1.08	0.72	2.83
Christchurch	0.54	0	0
East Dorset	0.32	0	0
North Dorset	3.23	3.61	1.54
Poole	0.31	0.74	0.76
Purbeck	n/a	n/a	n/a
West Dorset	3.3	5.87	0
Weymouth & Portland	0	0	0
Total BDP	**8.78**	**10.94**	**5.13**

Source: District Monitoring Reports

5.32 The table shows that there are big differences between the districts and the years. To calculate the allowance for future windfall losses the median[12] of the losses across the seven districts that recorded losses has been taken (which is 0.54 ha) and multiplied by 8 districts and 20 years. This results in an allowance for windfall losses of 86 ha for the time period between 2006 and 2026.

5.33 In 2006 and 2007 the actual windfall loss in the sub-region was 16 ha. This is above the expected windfall loss of 8.6 ha (2 years * 8 districts * 0.54 ha). Therefore the difference (7.4 ha) has been subtracted from the total allowance for windfall losses which results in an allowance of 79 ha for windfall losses across the sub-region between 2006 and 2026.

5.34 The total allowance for windfall losses has been distributed between the different TTWAs by taking into account the historic losses and the current stock of B-Use-Class floorspace[13] within each district. Table 14 shows the allowance for windfall losses for each TTWA and the Non TTWA.

[12] The median has been given the preference over the average as it does not take account of the outliers.
[13] VOA / GLC

Table 14 – Demand from Windfall Losses

	Bournemouth TTWA	Poole TTWA	Dorchester & Weymouth TTWA	Rural Dorset	Total
	ha	Ha	ha	ha	ha
Demand from Windfall Losses	22	22	20	15	79

Source: GVA Grimley, District Monitoring Reports

ALLOWANCE FOR CHURN

5.35 For the property market to operate smoothly a certain level of vacant land is required[14]. The demand for vacant land has been called demand for churn or frictional vacancy. To estimate the level of demand for church we have referred back to historic take up rates.

Table 15 – Churn Demand by TTWA

	2004/05	2005/06	Annual Average	Churn Demand
	ha	ha	ha	ha
Bournemouth TTWA	3.3	2.0	2.6	5.3
Poole TTWA	6.9	4.4	5.7	11.3
Dorchester & Weymouth TTWA	6.1	4.2	5.2	10.3
Rural Dorset	3.2	4.8	4.0	8.0
Total BDP	**19.5**	**15.4**	**17.4**	**34.9**

Source: GVA Grimley, Dorset Countywide Monitoring Report 2005 and 2006

5.36 As shown in Table 15 the annual average take up of employment land has been 17.4 ha between April 2004 and March 2006[15]. Assuming, as described in the methodology above (paragraphs 5.19ff), that it takes an in average 2 years from the moment a site is vacated till it is demolished, rebuilt and ready for re-occupation, the average annual take up has to be multiplied by two. This results in an allowance for churn demand of 35 ha.

SUMMARY BASELINE FORECAST

5.37 Overall there is a demand for 184 ha of employment land within the sub-region. The Bournemouth TTWA accounts for the largest part of the demand with 36% of the total demand falling within the Bournemouth TTWA. The Poole TTWA accounts for 25% of the total

[14] For a more detailed explanation see paragraphs 5.19ff.

[15] It is important to note that 81% and 50% of this take up has been on previously developed land in 2005 and 2006 respectively. It would therefore not be a valid assumption that an annual average employment land supply of 17.4 ha is required.

demand, the Dorchester & Weymouth TTWA for 23% and the area not falling with one of the TTWAs (Rural Dorset) accounts for 16% of the total demand as shown in Table 16.

Table 16 – Total Demand by TTWA and Source

	BDP	Bournemouth TTWA	Poole TTWA	Dorchester & Weymouth TTWA	Rural Dorset
Office	70.9	28.8	24.4	9.3	8.5
Industrial	-0.6	10.5	-11.5	2.4	-2.0
Windfall losses	79.0	22.2	21.6	20.1	15.0
Churn	34.9	5.3	11.3	10.3	8.0
Total	**184.2**	**66.8**	**45.9**	**42.1**	**29.4**

Source: GVA Grimley

5.38 In the demand for windfall losses and churn have been assigned proportionally to the two use types office and industrial. This is a more helpful way of aggregating demand in planning terms.

Table 17 – Total Demand by TTWA and Use Types

	BDP	Bournemouth TTWA	Poole TTWA	Dorchester & Weymouth TTWA	Rural Dorset
Office	93.8	36.7	31.5	14.9	10.7
Industrial	90.5	30.1	14.4	27.2	18.8
Total	**184.2**	**66.8**	**45.9**	**42.1**	**29.4**

Source: GVA Grimley

5.39 The phasing of the demand has been distributed across the 20 year planning period in line with the macroeconomic employment projections provided by Cambridge Econometrics. The employment growth over the next 20 years is very much front loaded resulting in a demand of 93 ha (51%) of the land requirements within the 2006 to 2011 time period as shown in Table 18. This is most likely due to the fact that the macroeconomic forecast on which this report is based has been undertaken in 2005 during a time of economic boom, which has been projected to continue for a longer time than it actually turned out to do. We therefore assume that the actual demand will be more evenly spread across the 20 years.

Table 18 – Demand by Phasing

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Bournemouth TTWA	26.2	18.8	17.0	4.8	66.8
Poole TTWA	23.1	10.4	3.9	8.5	45.9
Dorchester & Weymouth TTWA	20.0	6.4	5.6	10.0	42.1
Non TTWA	23.8	0.9	-0.9	5.6	29.4
Total	**93.1**	**36.5**	**25.7**	**28.9**	**184.2**

Source: GVA Grimley

5.40 At this stage a word of caution regarding the employment forecast and the resulting employment land demand seems appropriate. The employment forecast is based on an assumed 3.2% GVA increase pa in line with the Economic Strategy for the South West. There are two main aspects which have to be considered with regards to the employment projections: 1) the current economic slowdown and 2) the labour supply.

5.41 An economic growth of 3.2% GVA pa seems fairly ambitious in the current economic climate. However, the Workspace strategy has a time horizon of 2026 and this is a rate of growth that has been achieved in the past and, therefore, must be considered as an important potential outcome. Over this time period the current slowdown in the economy will most likely have a less drastic effect as it is felt in the present. It is most likely that the growth will be slower in the next few years and pick up again in the medium to long term; reducing short term demand but having a lesser effect on the long term demand.

5.42 The assumed economic growth of 3.2% GVA increase pa results in an increase in employment of about 57,000 between 2006 and 2026. As discussed in Chapter 4 the working age population is projected to grow by 32,000 in the most advantageous scenario. Even with potential labour supply from outside of the region, supply might therefore be a constraining factor to employment growth and to the employment land demand.

5.43 Furthermore, the sub-region is in competition with surrounding areas with regards to labour supply. In South Hampshire for example there are planes for the provision of approximately 2 million m^2 of new employment space[16]. This level of growth could have a significant impact on the labour supply available in South East Dorset.

QUALITATIVE ASPECTS OF DEMAND BY USE TYPE

5.44 The established employment land demand will express itself with different locational requirements depending on the different sectors and the geographical type of demand (market catchment areas). In this sub-section the general locational requirements of the different geographical types of market catchment areas (e.g. international, national, regional and local property markets) and the locational requirements of different use types are discussed.

GEOGRAPHICAL TYPE OF DEMAND

5.45 In all commercial property markets a distinction between different market catchment areas and their locational requirements can be made.

- **International / national market:** Transport access (air, rail and road), relatively large floorplates, access to skilled labour market and good quality of life (housing, schools, environment, culture) are in general important locational requirements.
- **Regional:** Transport access (rail and road) and adequate supply of premises / land are here the prevailing locational requirements.
- **Local:** Proximity to customers (and generally to a lesser degree suppliers), convenience (close to existing workforce, proprietor's home), adequate premises / land and costs are here the prevailing locational requirements.

OFFICE

5.46 Office employment is labour intensive resulting in many workers travelling to office premises. It is therefore important that office employment is located in areas with good public transport access to reduce car dependency. This is reflected in national and regional planning guidance.

5.47 Employees also prefer locations with easy access to amenities and facilities to have a choice for lunch and to be able to access these amenities and facilities before or after work. Employers more and more recognise this and therefore prefer locations in or adjacent to town centres.

5.48 In general office employers have a high demand for a skilled workforce. The quality of the labour supply is therefore important for most office employers. Some office based employment, like back office work and call centres, require relatively large supplies of labour. In these cases the skills level is often not so relevant, more important is the level of motivation and willingness to learn and work hard as these types of employers often train their staff themselves.

[16] Source: Bill Gordon at Poole Borough Council

5.49 Although discouraged by policy and contrary to the wish of many employees to be close to amenities and facilities there is also some demand for out of town business park development.

OTHER BUSINESS SPACE

5.50 Other business space has been defined for the Workspace Strategy as B1b (research & development), B1c (light industry) and B2 (general industry). These types of employment have in general a lower employment density than office employment. They are also often associated with bad neighbourhood uses (lesser so for the B1 than the B2 types) and might have some specific security needs (especially research and development). For these reasons they are less likely to locate in or close to town centres.

5.51 Research and development (R&D) companies often likes to be in proximity of a university where synergies can be used and a highly skilled labour force is available. R&D companies are also often results of university spin-offs and therefore located in their proximity. R&D is often located in campus type business parks.

5.52 Light industry (B1c) and general industry (B2) companies are often located on either mixed tenants industrial estates or on single sites (especially B2). They generally require good transport access and access to labour.

WAREHOUSING AND DISTRIBUTION

5.53 Warehousing and distribution requires for obvious reasons good transport access and access to markets. However, a distinction needs to be made between large national distribution centres and more localised regional and local warehousing and distribution.

5.54 National distribution centres require large sites very close to the motorway system. They are also concentrated around ports and airports. The possibility to serve a large catchment area is central for national distribution centres.

5.55 Regional and local warehousing has similar locational requirements as light and general industry with good access being more important. Local warehousing often needs to be fairly close to their markets and prefer locations on the edge of conurbations with good access to the centre.

LAND DEMAND FOR NON-B-USE-CLASS EMPLOYMENT

5.56 As discussed in Section 4 a significant part of the employment growth within the sub-region is expected to come from Non-B-Use-Class employment. Especially the sectors Health & Education, Retail and Hotel & Catering have high employment growth projections. There is currently little guidance to project land demand from employment projections within these sectors, especially with regards to employment densities and plot ratios. Furthermore many of these uses are not located on specifically designated land but are often part of town centre developments or mixed use developments. It is therefore outside of the scope of the Workspace Strategy to give guidance on the land demand from these sectors. Some very general thoughts on this issue are provided below.

RETAIL

5.57 A significant part of the growth in retail employment will be directed to town centres. There are robust mechanisms in place to assess the future demand for retail space based on population projections and expenditure forecasts. Some of the growth in retail employment might occur on out-of-town retail development for which there is clear planning guidance. A small part of additional retail employment is likely to take place on designated employment land and the appropriateness of this will be tested through the planning system in each individual case.

HOTEL & CATERING

5.58 These sectors have very diverse locational requirements and the growth of employment in these sectors is most likely best planned for on a local level. Business tourism requires large sites close to good transport access (public and road) where as leisure tourism is focussed on town centres and attractive rural and coastal locations.

EDUCATION & HEALTH

5.59 Planning for health and education is not as well established as for retail and B-use sectors. There are different approaches depending on who undertakes the planning.The planning of Primary Care Trusts (PCTs) and Hospital Trusts is closely linked to the governments spending approach for the NHS. In principal it is linked to the needs of the current population, with a delay of up to three years for the provision of population estimates. This leads to a ‘retro-active’ planning approach.

5.60 Regional, sub-regional and local planning bodies however have adopted in the recent past a Social Infrastructure Framework (SIF) for land requirements for primary care and hospitals.

The SIF approach is based on population projections and derives, over a number of agreed parameters, floorspace and land requirements for primary care and hospitals.

5.61 Similar to health there is an approach to forecasting land demand for education by the education authority and by the SIF. School plans look at the current cohort of the previous age group (e.g. 0-5 for primary school) and project demand on this base. The SIF model is based on demographic forecasts and applies floorspace and plot ratio standards to identify land demand.

5.62 The land demand planning approach for both health and education are solely focussed on state provision. However, in both cases there is a strong private sector which is expected to grow in the future.

5.63 As with retail and leisure current planning for land demand for health and education is not linked to employment projections in these sectors. Furthermore there is in both sectors a significant private provision for which the planning approach is unclear. The questions at hand are therefore:

- What is the current split between public and private employment in the health and education sector?
- How is this split likely to change in the future?
- To what degree do the currently used methodologies reflect the macroeconomic forecasts in these sectors?
- Can the SIF approach be translated into the private sector?

5.64 The South West RDA is in the process of commissioning a separate study to give guidance on the policy implications of employment growth in Non-B-Use-Class employment. The study brief's aims are to get a strategic understanding of the land demand requirements and to give guidance to local planning authorities on how to assess the demand within their area.

6. EMPLOYMENT LAND SUPPLY

6.1 After having established the future employment land demand in the previous chapter, this chapter looks at the current supply. Under supply we understand land which is available for development, being this vacant land or land with long-term vacant buildings[17].

6.2 As a first step an overview of the employment land supply is presented. The data used for this overview is largely taken from the Employment Land Reviews by the districts. In some cases adjustments have been made to the assumed phasing of the availability of individual sites to provide consistency across the sub-region.

6.3 In a next step specific key sites for the sub-region and their role in the supply of employment land are discussed. This then leads to a consolidated supply position for the sub-region by phasing and TTWA.

EMPLOYMENT LAND SUPPLY OVERVIEW

6.4 In accordance with the districts' Employment Land Reviews the following definitions for the phasing of the availability of sites has been used:

- Short Term: site can be developed within 0-2 years
- Medium Term: site is likely to be developed in 3-5 years
- Long Term: site is not likely to be developed within the next 5

6.5 In terms of size the following definition has been used:

- Very Large: 10+ ha
- Large: 2-10 ha
- Medium: 0.5-2 ha
- Small: <0.5 ha

6.6 In total the districts' Employment Land Reviews report a supply of vacant employment land of 278 ha. Of this 86 ha is developable within the next 2 years, according to the Employment Land Reviews. A further 99 ha are assumed to come forward with 3 to 5 years. The remaining 93 ha are not likely to come forward in the next 5 years as shown in Table 19.

[17] As with land there is a need for frictional vacancy for the property market to function smoothly. Vacant units of short term vacant buildings are therefore not considered as part of the employment land supply.

Table 19 – Available Land by Phasing

	Short	Medium	Long	Total
Bournemouth TTWA	29.2	5.5	62.6	97.2
Poole TTWA	10.2	46.7	11.6	68.5
Dorchester & Weymouth TTWA	18.5	29.1	8.1	55.7
Rural Dorset	28.2	17.9	11.0	57.0
Total	**86.0**	**99.2**	**93.3**	**278.4**

Source: Data provided by the districts and unitary authorities

6.7 The Bournemouth TTWAs has with 97 ha the largest supply of available employment land according to the districts Employment Land Reviews. Of the available employment land in the Bournemouth TTWA 58 ha are located at the airport. Almost two-thirds (63 ha) of the available employment land in the TTWA are assumed to come forward only in the long term. The Poole TTWA has a supply of available employment land of 69 ha of which 57 ha are assumed to come forward within the next 5 years according to the Employment Land Reviews. The Dorchester & Weymouth TTWA has a recorded supply of available employment land of 56 ha of which about a third can come forward in the short term. Rural Dorset has a supply of 57 ha of available employment land of which around half is assumed to come forward in the next 2 years.

6.8 The seven very large (above 10 ha) site account for 132 ha (46%) of the available employment land. Their size, location and phasing is given in Table 20.

Table 20 – Very Large Available Employment Sites

TTWA	Local Authority	Address	Phasing	Available Land (ha)
Bo	Christchurch	Aviation Park West	Long	38
Bo	Christchurch	Aviation Park East	Long	20
DW	Purbeck	Winfrith Technology Centre, Winfrith	Medium	20
DW	Weymouth & Portland	Osprey Quay	Long	19
Pu	Purbeck	Admiralty Park	Medium	13
Rural	North Dorset	Brickfields Business Park	Short	12
Pu	Purbeck	Holton Heath Industrial Estate, Holton Heath	Medium	10

Source: Data provided by the districts and unitary authorities

6.9 There are 25 large (2-10 ha) sites accounting for 112 ha (40%)[18] of the available employment land. The sites below 2 ha, of which there are 55, account for 46 ha (16%) of available employment sites as shown in Table 21.

6.10 Due to the lack of a specific site boundary and the un-adopted status of the RSS we have not included the 20ha employment extension (Area of search 7G) in East Dorset in the supply

[18] A list of all the available employment sites is given in Appendix A.

figures. The RSS had not reached Proposed Modifications stage when the supply analysis was undertaken. However this site can easily be added to the strategy if progressed in the planning process and more concrete information on the actual supply is available.

Table 21 – Available Land by Size

	Very Large	Large	Medium	Small	Total
Bournemouth TTWA	58.0	25.8	12.4	1.0	97.2
Poole TTWA	23.1	24.1	17.9	3.4	68.5
Dorchester & Weymouth TTWA	28.1	24.7	3.0	0.0	55.7
Rural Dorset	11.7	37.3	7.8	0.3	57.0
Total	**120.8**	**111.8**	**41.2**	**4.6**	**278.4**

Source: Data provided by the districts and unitary authorities

6.11 About a quarter of the employment land supply (66 ha) is within large sites which are likely to come forward in the long term as shown in Table 22.

Table 22 – Available Land by Size and Phasing

	Very Large		Large		Medium		Small		Total	
Phasing	**ha**	**%**	**ha**	**%**	**ha**	**%**	**ha**	**%**	**ha**	**%**
Long	66	24%	14	5%	13	5%	1	0%	93	33%
Medium	43	15%	45	16%	9	3%	2	1%	99	36%
Short	12	4%	53	19%	19	7%	2	1%	86	31%
Total	**121**	**44%**	**112**	**40%**	**41**	**15%**	**5**	**2%**	**278**	**100%**

Source: Data provided by the districts and unitary authorities

6.12 Large sites which are expected to be deliverable within the next two years account for 53 ha (19%). They are shown in Table 23.

Table 23 – Large Sites Available in the Short Term

Local Authority	Address	Phasing	Available Land (ha)
Bournemouth	Castle Lane East (Riverside Avenue)	Short	6
Christchurch	BAE	Short	8
East Dorset	Ferndown, East of Cobham Road	Short	8.4
North Dorset	North Dorset Business Park	Short	4.4
North Dorset	Park Farm	Short	4.2
Poole	Former BT site, Yarrow Road	Short	2.6
West Dorset	Chickerell, Radipole Lane	Short	4.2
West Dorset	Chickerell, Putton Lane	Short	4
West Dorset	Dorchester, Poundbury	Short	3.9
West Dorset	Sherborne, Barton Farm	Short	3.5
West Dorset	Dorchester, Poundbury	Short	2.1
West Dorset	Crossways, land to the west of Warmwell Road	Short	2.1

Source: Data provided by the districts and unitary authorities as at July 2008

6.13 Although all these sites are readily available for employment development some of these sites are less likely to actually come forward. Others will provide a specific type of supply. A selection of these sites, along with some other key sites is therefore discussed below to establish a deeper understanding of the supply position within the sub-region.

SITE SPECIFIC CONSIDERATIONS

AVIATION PARK WEST AND EAST, CHRISTCHURCH

6.14 As suggested in a study commissioned by Christchurch Borough Council which looked at the role of land at the airport in the sub-regional economy[19], there are road infrastructure constraints which have to be overcome to further develop the sites for major employment. A study is underway by Peter Brett Associates in behalf of Manchester Airports Group, the owners of the Airport, to quantify the level of development which can take place subject to certain local road improvements. The development of the remainder of the sites beyond the additional capacity created by local improvements is subject to a new link road. The employment development on the site will not be able to fully contribute to the cost of the new link road and further funding has to be secured for any development in excess of that able to be supported by local road improvements.

6.15 The outputs of the emerging Peter Brett Associates Transport and Infrastructure Study will confirm what supply will be available in the short and medium term (and hence the residual amount of available land in the long term). In advance of the outputs of the Peter Brett Associates study (and taking into account the fact that some land at Aviation Park will cater for specific aviation related employment development or other inward investment which is outside of the demand forecast in Chapter 5) it is suggested that for the baseline assessment 10 to 20 ha[20] is assumed to be able to be brought forward subject to local road improvements.

6.16 Due to the proximity to the Airport and the existing aviation related occupiers on the sites Aviation Park West and East have the potential to further attract (inward) investment from aviation related businesses (in addition to investment from other sectors). Such employment growth would be beyond the demand forecast presented in Chapter 5.

6.17 We therefore suggest that for the baseline assessment that 15 ha are considered as long term supply for potential growth sectors identified in the NLP Airport Study and that the remainder of the site is considered to cater for specific aviation related employment or other inward investment which is outside the demand forecast in Chapter 5.

CASTLE LANE EAST (RIVERSIDE AVENUE), BOURNEMOUTH

6.18 Castle Lane East is by far the single largest available employment land within Bournemouth. Due to capacity constraints at the existing access a new, grade separated junction is required for the site to be developed for employment. This is a significant constraint for the development of the site and although the site is readily available for development unless the access land can be acquired to create the junction it seems unlikely that this will happen in the short term. The site should therefore be considered as a long term option.

WINFRITH, PURBECK

6.19 Employment development at Winfrith has become more likely with recent developments. A development partner has been selected and the design process initiated. Due to its size (20 ha and possibly more) and the remote location the site provides a very specific supply. We understand that in the past start-up units have been successfully let on the site and there is no reason why this might not work in the future. However, it is unlikely that local demand will be sufficient for the development of the entire site and it seams more likely that one or more occupiers with specific requirements will take up premises on the site.

[19] The Future Role of Land at the Bournemouth Airport in the Sub-regional Economy, Nathaniel Lichfield and Partners on behalf of Christchurch Borough Council

[20] In the final supply analysis we have taken the average (e.g. 15 ha) and have assumed that this will not come forward within the next 5 years.

6.20 We therefore suggest that 5 ha are considered to cater for the local demand and that the remainder of the area is considered to cater for a specific demand (e.g. from an inward investor), which is outside the demand established in Chapter 5.

OSPREY QUAY, WEYMOUTH & PORTLAND

6.21 Osprey Quay is an employment site with waterfront access. As such it represents an important supply contributing to the attractiveness of the sub-region as a location for marine related industries and caters for this demand, which has been identified in the as part of the property market research(see Chapter 3). Parts of the site have been already taken up (e.g. Sunseekers) and other parts are committed to uses related to the proposed leisure marina.

6.22 Creating a 'marine industry hub' at Osprey Quay has the potential to attract further employment in this sector which would be beyond the demand identified in Chapter 5. This will have to be considered when looking at the demand and supply balance in Chapter 7.

6.23 Furthermore, Osprey Quay is the location for the sailing competitions of the 2012 Olympics and parts of the site (4.5 ha) will only come forward as employment sites after this date.

6.24 Osprey Quay therefore provides 3.6 ha of short term available employment land and 4.5 ha of long term employment land supply.

POUNDBURY AND SHERBORNE, WEST DORSET

6.25 The employment allocations in Poundbury and Sherborne in West Dorset are both part of a mixed use allocation. This will bring most likely some limitations to the type of uses and occupiers for these allocations. Furthermore, there is expected to be a premium to the rental costs / sales value as these are both prestigious locations. Both allocations are therefore expected to attract predominantly higher end office uses and will not cater for the lower end of the office and industrial market.

6.26 The supply at Poundbury is classified as short term, as parts are ready for development. However, according to the planning brief the supply at Poundbury is expected to come forward spread over the planning period. This will reduce the actual supply of employment land in the short and medium term.

BEAMINSTER, NORTH OF BROADWINDSOR ROAD

6.27 Beaminster has relatively poor strategic road access. The employment allocation in Beaminster suffers from access and environmental constraints. Any employment development on the site would have to bear abnormal development costs to overcome these issues. We understand that South West RDA has undertaken a viability assessment of employment development on the site which resulted in negative land values.

6.28 The site has therefore not been considered as contributing to the supply of employment land within the sub-region. However, it is important to allow future employment development on the site if the neighbouring occupier (Clipper Teas) wishes to expand.

FERNDOWN, EAST OF COBHAM ROAD, EAST DORSET

6.29 Although the site itself is readily available for development and a planning application has received a committee resolution for approval by the District Council, the legal agreement still needs to formalised and off site physical works need to be undertaken to facilitate development. We therefore suggest the site to be considered as medium term supply.

CONSOLIDATED EMPLOYMENT LAND SUPPLY

6.30 After having taken into consideration site specific issues of key sites[21], the overall supply of available employment land within the sub-region is considered to be 216 ha. Of this total supply 164 ha is considered to be available within the next 5 years as shown in Table 24. Maps showing the location of the consolidated employment land supply are given in Appendix F.

Table 24 – Consolidated Supply by Phasing

	Short term ha	Medium term ha	Long term ha	Total ha
Bournemouth TTWA	14.7	13.9	25.6	54.2
Poole TTWA	9.2	46.7	11.6	67.5
Dorchester & Weymouth TTWA	22.1	14.1	4.5	40.7
Rural Dorset	28.2	14.2	11.0	53.3
Total	**74.1**	**88.9**	**52.7**	**215.7**

Source: GVA Grimley, BDP districts

6.31 Of the total supply 50 ha is within 4 sites with over 10 ha each, a further 121 ha is within 27 large (2-10 ha) sites as shown in Table 25. Only 45 ha of the supply is provided in medium (0.5-2 ha) and small (<0.5 ha) sites.

[21] Site specific issues were only taken in account for the 29 key sites which were specifically assessed as part of this Strategy (see Chapter 10). However, it is likely that other smaller sites face similar issues. The estimated overall supply of employment land presented here is therefore likely to be an over estimate and the actual available supply is probably somewhat lower.

Table 25 – Consolidated Supply by Size

	Very Large	Large	Medium	Small	Total
	ha	ha	ha	ha	ha
Bournemouth TTWA	15.0*	25.8	12.4	1.0	54.2
Poole TTWA	23.1	24.1	16.9	3.4	67.5
Dorchester & Weymouth TTWA	0.0	37.7	3.0	0.0	40.7
Non TTWA	11.7	33.6	7.8	0.3	53.3
Total	**49.8**	**121.2**	**40.2**	**4.6**	**215.7**

*Source: GVA Grimley, BDP districts *The Peter Brett Associates study when available will confirm whether this figure is realistic.*

7. BALANCING DEMAND AND SUPPLY

7.1 Having established the demand for employment land in Chapter 5 and considered the supply in Chapter 6, in this Chapter the demand and supply is compared and any gaps in the different geographies and by phasing identified.

7.2 As a first step this is done for the baseline employment land demand established in Chapter 5. In a next step a selection of demand and supply scenarios are considered and their possible effect on the employment land demand and supply balance assessed.

BASELINE DEMAND AND SUPPLY BALANCE

7.3 In the long term, for the sub-region as a whole, there seems to be an adequate supply of employment land as shown in Table 26. However, there are some supply gaps with regards of phasing and geographies, especially in the short term in the Bournemouth and Poole TTWAs and in the long term in the Dorchester & Weymouth TTWA.

Table 26 – Demand and Supply Balance[22]

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
BDP				
Demand	93.1	36.5	54.6	184.2
Supply	74.1	88.9	52.7	215.7
Balance BDP	**-18.9**	**52.4**	**-1.9**	**31.5**
Bournemouth TTWA				
Demand	26.2	18.8	21.8	66.8
Supply	14.7	13.9	25.6	54.2
Balance Bournemouth TTWA	**-11.5**	**-4.9**	**3.8**	**-12.5**
Poole TTWA				
Demand	23.1	10.4	12.4	45.9
Supply	9.2	46.7	11.6	67.5
Balance Poole TTWA	**-13.9**	**36.3**	**-0.8**	**21.6**
Dorchester & Weymouth TTWA				
Demand	20.0	6.4	15.7	42.1
Supply	22.1	14.1	4.5	40.7
Balance Dorchester & Weymouth TTWA	**2.1**	**7.7**	**-11.2**	**-1.4**
Rural Dorset				
Demand	23.8	0.9	4.7	29.4
Supply	28.2	14.2	11.0	53.3
Balance Rural Dorset	**4.4**	**13.3**	**6.2**	**23.9**

Source: GVA Grimley

BOURNEMOUTH TTWA

7.4 Overall there is an undersupply of 13 ha of employment land within the Bournemouth TTWA. In the short to medium term there is a shortfall of 12 ha. However, as noted above the supply analysis does not include the potential 20ha of employment land that may come forward within the area of search at Ferndown and contribute towards supply. However even if the

[22] To balance the demand and supply of employment land the five year time steps of the demand analyses have been matched with the supply analysis of short (0-2 years), medium (3-5 years) and long (5+ years) term. Assuming a start date of 2009 the short-term supply matches the first demand time period (2006-2011). However, the medium and long term supply time periods are slightly shorter than the second (2011-2016) and third (2016+) demand time periods. However, in the light of the recent slowdown in property development due to the credit crunch a general delay in sites coming forward can be expected which will align the two time schedules.

20ha was included this would still result in a shortfall in the short to medium term as there is likely to be highways issues (A31) in bringing this site forward.

7.5 However, these total figures only tell part of the story. Over half of the demand in the Bournemouth TTWA is for office (see Table 17) and there is a limited supply of available employment land for office development. Parts of this demand could be directed to the Airport but development at the Airport is not likely to come forward in the short to medium term and there are sustainability and policy considerations which might limit the development of office supply at the airport.

7.6 As the strongest office market in the sub-region the shortfall of available land for office development in the Bournemouth TTWA is of some concern.

POOLE TTWA

7.7 In the long term Poole TTWA has a sufficient supply of employment land. However, the area faces a supply shortage in the short term.

7.8 Two thirds of the net additional demand for employment land within the Poole TTWA is for office space (see Table 17). Industrial employment (B1 b/c, B2, B8) is projected to decline, freeing up 11.5 ha of employment land (see Table 16). Assuming that not all of this freed-up industrial land is suitable for office use there might be a shortfall for land adequate for office uses, especially in the short term. Some or all of this unmet demand could be directed to office development opportunities in the town centre (including the Poole Bridge Regeneration Area) which is in addition to the employment supply identified in Chapter 6.

7.9 Significant amounts of available employment land in the Poole TTWA is located at Holton Heath (23 ha). If this land, which is classified as being available in the medium term, does not come forward, supply in the Poole TTWA will stay tight over the next 20 years.

DORCHESTER & WEYMOUTH TTWA

7.10 Overall there is a slight supply shortage in the Dorchester & Weymouth TTWA. However, large part of the supply in the Dorchester & Weymouth TTWA is located at Osprey Quay (8 ha). Osprey Quay provides a specific type of supply. It is especially attractive to marine related employment and, due to its poor strategic allocation, less attractive for some other market segments. Not including the supply at Osprey Quay to the overall supply, but putting it aside for the marine industries related demand, would leave the Dorchester & Weymouth TTWA with a significant supply shortfall in the order of 9 ha.

7.11 The supply of employment land at Poundbury (6 ha) again is likely to cater for a very specific market, mainly the high end office market, as discussed in paragraph 6.25. This will leave a shortfall in the lower end office and industrial land supply. Furthermore the supply at Poundbury is projected to come forward in phases spread over the entire planning period. This will limit the supply in the short and medium term and will leave a supply gap in the next five years.

7.12 Weymouth & Portland has in the short term a supply shortage which will lead to an additional demand for employment land in West Dorset[23]. This is even more so the case if the supply at Osprey Quay is not in its entirety considered as supply for a general demand outside the marine technologies. For the Dorchester & Weymouth TTWA it is therefore especially important that supply needs to be planned across the local authority boundaries.

7.13 The Dorchester & Weymouth TTWA faces, alongside with the Bournemouth TTWA, the most challenging employment land supply, being largely dependent on a few sites for the supply of which most (Osprey Quay, Winfrith, Poundbury) cater for a very specific market segment and/or face some delivery challenges.

RURAL DORSET

7.14 Employment land supply in Rural Dorset seems to be adequate. Over a third of the demand between 2006 and 2026 is for office space. However, large parts of the available employment land supply are more suitable for industrial uses. This leaves a supply gap for good quality office land, preferably in town centres, within Rural Dorset.

7.15 The issue of the supply of employment floorspace in Rural Dorset is less the amount of available employment land and more the delivery of employment premises. The market does not deliver the required employment floorspace. This is due to the market conditions in Rural Dorset, together with the somewhat remote location of some of the employment locations.

7.16 To provide local employment and reduce the need for travel the development of employment premises across Rural Dorset seems important.

SCENARIOS

7.17 The baseline demand and supply balance is based on a number of assumptions described in Chapter 5 and 6 respectively. Below a series of demand and supply scenarios are assessed, which are beyond the baseline assumptions[24].

[23] This is indicated in the district level demand and supply balance in Appendix D.
[24] The selection of the scenarios has been agreed with the project board and the implications discussed at a workshop.

7.18 The findings of the scenario assessment will help to better understand the demand and supply balance and will help inform planning if future economic development varies from the baseline assumptions.

DEMAND SCENARIOS

MARINE SECTOR

7.19 The proximity to the sea has been identified as one of the locational advantages of the sub-region. According to the Economic Vision for Weymouth & Dorchester Weymouth & Portland is an ideal location for marine businesses, with its strong tradition of maritime activity and a skilled workforce. This is to a lesser extent also true for Poole.

7.20 The growth of the marine sector is being promoted by South West RDA and Weymouth & Portland Borough Council. As a key issue for the growth of the sector the need for waterside sites has been identified[25]. A continued supply of waterfront employment sites is therefore required.

FINANCE & BUSINESS SERVICES

7.21 The main Bournemouth office location is at Lansdowne. Other opportunities are the expansion of employment development at Wessex Field and potentially Riverside Avenue if this became available. The Bank of New York is expanding and Barclays has confirmed their relocation within Poole. JP Morgan was an international investment.

7.22 Poole's office market has been also growing in the recent past. The regeneration of Poole's town centre provides an opportunity for the Finance & Business Service sector. The nature of the employment opportunities in Poole's town centre which includes 36,000 m^2 of business floorspace in the Poole Bridge Regeneration Area has the potential of contributing to a step change in the local economy.

7.23 It is important to attract good quality employment in the Finance & Business Service sector and not just back office employment. And there is therefore a need for good quality town centre office locations within the Bournemouth and Poole conurbation. In the light of the very tight supply of land suitable for office use in the Bournemouth TTWA some part of the demand could be directed to Bournemouth Airport but this is most likely to be in the longer term and subject to sustainability and policy approval.

[25] Economic Vision for Weymouth & Dorchester, Evidence Base, February 2008.

AVIATION FOR CHRISTCHURCH & EAST DORSET

7.24 Although technically speaking large parts of the aviation industry does not need to be directly located next to an airport, the Bournemouth Airport with its adjacent employment land supply has the potential of expanding its aviation related employment. The NLP report identifies sector opportunities for general manufacturing, advanced engineering, financial / business services, ICT and distribution / logistics for the airport. The potential for sectors at the Airport is discussed further in table 27 below.

7.25 Manchester Airport Group (MAG) has produced a spatial framework. The next steps for Christchurch Borough Council will be to address the airport and its future role in their LDF Core Strategy and to produce a supplementary planning document.

7.26 A report on the future role of employment at Bournemouth Airport[26] sets out a market facing approach to land use at the airport of 80% of general industrial (mainly smaller units) and 20% office.

7.27 An increased demand for employment land from aviation related activities could be accommodated within the employment land supply next to Bournemouth Airport, at least in the medium to long term.

DIVERSIFICATION FOR WEST DORSET

7.28 West Dorset's economy is heavily reliant on the public sector. Employment in this sector is projected not to grow. This requires a diversification of employment in West Dorset.

7.29 The Dorchester & Weymouth Vision envisaged re-direction of some of the public sector activity from Dorchester to Weymouth. The Vision promotes further office space and knowledge based employment within the TTWA. This should introduce other sectors to the area and alleviate the reliance on the public sector.

7.30 This reconfirms the assessment in the baseline demand and supply balance above for the need of good quality affordable office accommodation within the Dorchester & Weymouth TTWA.

MEDI-PARK AT POOLE

7.31 Due to growth in the health sector, recent discussions with the university, RDA and Poole & Bournemouth hospital authorities had indicated a potential for a Medi-Park in Poole. Poole

[26] The Future Role of Employment at Bournemouth Airport for the Sub-regional Economy, Nathaniel Lichfield & Partners, 2008

Core Strategy identifies an opportunity for a health-related employment cluster. This is based upon various strands of evidence:

- employment projections indicate significant growth in the health sector;
- Bournemouth and Poole PCT have expressed a need for 'out-sourcing' of services and facilities from larger hospitals, which will have implications for local surgeries and health centres, but could also involve specialist treatment facilities which serve a wider sub-regional/regional need;
- in the recent past a number of employment sites in Poole have been the subject to pressure from ad hoc proposals for health and care-related uses, including a dialysis unit at Mannings Heath, which has now been built;
- the University is supportive of a cluster-based approach which can help the conurbation to develop skills, training and research specialisms and foster links between the university and health sector.

7.32 There might be the possibility of such a development at the Sopers Lane site if the masterplan for these non-B uses could be developed with the two owners. Siemens lease on the site runs out in 2009. Part of the site is currently on sale for £8million.

7.33 According to information by South West RDA there are currently 13 medical companies across the conurbation and South West RDA has raised the question if there is currently a big enough critical mass to trigger the demand for a Medi-Park in the conurbation. In any case this is seen as an option to pursue in the future as a Medi-Park would have the potential of providing synergies within the sector and increased economic performance to the sub-region.

CHANGE IN WORKING PRACTICE

7.34 Decentralised working is already an important aspect of the economy. This is especially the case in rural areas. Working in remote offices, from a room in ones home or in a live work unit is expected to become more common in the future. This provides an important source and mode of economic activity in rural areas.

7.35 The local planning authorities should therefore consider suitable planning policies to allow for remote working.

SUPPLY SCENARIOS

EMPLOYMENT LAND PROVISION AT BOURNEMOUTH AIRPORT AND WINFRITH

7.36 Scale of delivery at both sites is currently not clear. In the baseline assessment we have assumed 15 ha to come forward in the long term at Bournemouth Airport and 5 ha of the available employment land at Winfrith to contribute to the local demand. These assumptions could change significantly in both directions.

7.37 If strategic access are issues resolved at Bournemouth Airport there could be a supply of up to 58 ha. This would allow for significant inward investment[27] and help to support a step change in the sub-regional economy. However, this additional supply would not cater for local demand in other areas of the sub-region. With more land coming forward at the Airport pressure on industrial demand within the Bournemouth TTWA would be eased and some of the office demand could be directed to this location (although in planning and sustainability terms the town centre would be a preferable location for office development).

7.38 A report on the future role of employment at Bournemouth Airport[28] has analysed the potential of different sectors at the Airport. The assessment considers a business as usual scenario and a scenario assuming a step change in the economy which would include:

- More scheduled flights at the Airport
- provision of high quality serviced employment sites and some speculative premises
- significant expansion of Bournemouth University's scientific, engineering or ICT specialisms
- significant improvements to strategic road infrastructure in the sub-region
- development of a greater entrepreneurial culture
- more active promotion of the area as an investment location

7.39 The results of this assessment are presented in Table 27.

[27] In the light of the RSS Panel Report, which recommends focussing office development on Bournemouth and Poole town centres, the majority of the potential 58ha supply will be directed towards industrial and distribution uses.
[28] The Future Role of Employment at Bournemouth Airport for the Sub-regional Economy, Nathaniel Lichfield & Partners, 2008.

Table 27 – Potential for Different Sectors at the Airport

Sector	Current Representation in Sub-region	Potential at Aviation Park	Scope with Step Change in economy
Business Aviation	Low	Low	Moderate
Aircraft Maintenance/repair	Low	Low/moderate	Moderate
Air Freight	Low	Low	Low/moderate
General manufacturing	Moderate	Moderate/High	Moderate/High
Advanced Engineering	High	High	High
Environmental industries	Low	Low	Low/moderate
Financial/Business services	High	Moderate/High	High
ICT	Moderate	Moderate	High
Bio-technology/Medical	Low	Low	Low
Marine Technologies	High	Low	Low
Cultural/creative	Moderate	Low	Moderate
Leisure/hospitality	High	Low	Low
Distribution/logistics	Moderate	High	High

Source: The Future Role of Employment at Bournemouth Airport for the Sub-regional Economy, Nathaniel Lichfield & Partners, 2008

7.40 The assessment of the potentials of different sector indicates that the Airport is potentially a good location for local businesses and their expansions (e.g. in general manufacturing, advanced engineering, distribution and logistics) which are already well represented in the sub-region and at the Airport. The airport has also the potential for attracting inward investment from the existing strong sectors as well as from additional sectors (e.g. ICT, business aviation) especially under the 'step change in economy' scenario.

7.41 At Winfrith around 20 ha of employment land is likely to be developed as large parts of the site are not suitable for residential development due to the proximity to the heathland. There is a question if Winfrith could contribute to the short term supply shortage for office space in the Poole TTWA and/or Dorchester & Weymouth TTWA. This would have to be considered carefully on policy and sustainability terms.

URBAN EXTENSIONS

7.42 As discussed in Chapter 2 the RSS and the Panel Report proposes several urban extensions across the sub-region. These urban extensions have so far only been discussed as residential extensions (with the exception of Ferndown). It is our view that in principle in all cases the feasibility of allocating B-Use-Class employment (and other employment) in these urban extensions should be considered.

7.43 Identifying employment land in the Ferndown area would be especially important if employment land at the Airport will not come forward. However, significant development at Ferndown will also face some significant infrastructure challenges. Employment land provision as part of the urban extensions in Dorchester and Weymouth would help to ease the long term supply shortage in the Dorchester & Weymouth TTWA.

8. SUMMARY AND RECOMMENDATIONS

SUMMARY

DEMAND

8.1 Overall we estimate that there is a gross demand of around 184 ha of employment land between 2006 and 2026 in the sub-region which is almost evenly split between land demand for office uses (94 ha) and for industrial uses (90 ha). The overall demand is mainly driven by demand for office uses and for warehousing. Traditional industrial employment is projected to decline, leaving a demand for renewal and replacement of existing industrial employment sites where these are not fit for purpose (any more).

8.2 Office demand is focussed on the Bournemouth and the Poole TTWAs (37ha and 32 ha respectively) where as industrial demand is spread more evenly across the sub-region.

8.3 As part of the analysis we have considered a number of scenarios. We do not envisage that any of these scenarios significantly increase the overall demand for employment land in the sub-region. The macroeconomic forecast the demand analysis is based on assumes a 3.2% GVA growth rate pa. We regard the different demand scenarios discussed in Chapter 7 as options to achieve the growth aspirations of 3.2% GVA pa and not actually increasing the overall employment land demand.

8.4 The demand scenarios discussed in Chapter 7 have therefore less an impact on the quantitative aspects of the projected employment land demand and more on the qualitative aspect. In summary the qualitative employment land demand requirements following from the demand scenarios are as follows:

- **Marine Sector:** Requirements for waterside industrial units, foster clustering of marine industries (e.g. at Osprey Quay)
- **Finance & Business Services:** Requirements for high quality town centre office premises predominately in Bournemouth and Poole
- **Aviation for Christchurch & East Dorset:** Safeguard some employment land for aviation industry with access to the runway at Bournemouth Airport, where there is a requirement to safeguard some airside land for companies that specifically require airside access. The fostering of a cluster of sectors is also explored (e.g. at the Airport where The NLP assessment of sector opportunities identifies general manufacturing, advanced engineering, financial / business services, ICT and distribution / logistics for the airport).

- **Diversification for West Dorset:** Requirements for good quality affordable office accommodation within the Dorchester & Weymouth TTWA
- **Medi-Park at Poole:** Flexible approach to employment land designation to allow a Medi-Park type development if and when the demand for one arises
- **Change in working practice:** Provide planning policies to allow remote working

SUPPLY

8.5 Based on the Employment Land Reviews of the local authorities and our assessment of a selection of key sites we have identified a total supply of 216 ha of employment land within the sub-region. Of this supply 74 ha is perceived to be available in the short term, 89 ha in the medium term and 53 ha in the long term.

8.6 Of the total supply 50 ha is within 4 sites over 10 ha each. A further 121 ha is within 27 large sites (2 – 10 ha).

8.7 Based on information from Dorset County Council we have estimated that around 15 ha of employment land at Bournemouth Airport could come forward subject to local road improvements. A study has been commissioned by the Airport to determine the quantum of land that could be delivered subject to local road improvements only, the findings are still awaited. Previously we have been informed that a further 43 ha could be developed subject to a link road being built however there does not appear to be a means of evidence to back this up at this stage. Therefore Christchurch Borough Council is seeking to commission further work by Peter Brett Associates to determine the upper limits of land that come forward with specific infrastructure improvements. Due to the uncertainties regarding the likelihood of a new link road being built we have, for the Workspace Strategy, assumed that 15 ha of employment land at the Airport will come forward in the long term (5+ years).

8.8 Plans for the development at Winfrith are being developed as the research for the Workspace Strategy was undertaken. On the bases of the information available at this stage we estimate that there could be around 20 ha of employment land coming forward at Winfrith. As discussed earlier we do not assume that all of this will serve a local employment market. We have therefore assumed for the Workspace strategy that 5 ha of employment land at Winfrith will be serving a local employment market and will come forward in the medium term (2-5 years).

BALANCING DEMAND AND SUPPLY

8.9 Supply and demand are unevenly spread across the sub-region.

8.10 In the Bournemouth TTWA there is an overall undersupply of employment land. A shortage of good quality available land for office use is a significant issue for the Bournemouth TTWA. However as acknowledged above if the 20ha of employment land (not included within our supply analysis due to the timing of the study and the un-adopted nature of the RSS) comes forward within the RSS Area of Search North West of Ferndown then this will overcome the apparent shortage.

8.11 In the Dorchester & Weymouth TTWA there is a very tight supply of employment land. Within this TTWA there is a specifically tight supply in Weymouth & Portland especially when considering the specific offer that Osprey Quay and Winfrith present.

8.12 The Poole TTWA has overall an adequate supply of employment land. However, the Poole TTWA suffers of a significant (13 ha) shortfall of employment land in the short term, of which important amounts are for office use.

8.13 Rural Dorset has an adequate supply of available employment land. However, the area faces challenges regarding the delivery of employment premises due to the local market conditions and the somewhat remote location of many of the employment sites.

8.14 Significant part of the employment land supply in the sub-region is afflicted with uncertainties regarding the likelihood of these sites coming forward. Is large parts of the assumed supply does not come forward, this will leave the sub-region with a supply shortage most likely having a negative affect on the performance of the local economy.

RECOMMENDATIONS

8.15 A set of recommendations is given at this stage of the report derived from the findings presented in Section A. These recommendations are of general nature and are largely picked up again on a site level in the Delivery Plan in Section B.

RECOMMENDATION A: EMPLOYMENT LAND POLICIES

8.16 On a district and unitary authority level the employment land protection policies are central to the successful protection of existing employment land. Based on our extensive experience with employment land reviews and assessments of employment land policies we recommend an approach which:

- Identifies in planning documents all regionally and locally important employment sites[29]. The site identification should be evidence based and could for example take into account

[29] As this is for example done in Bournemouth and in Poole

the following criteria: size, number of employees on site, access to strategic road network, access to facilities and amenities, other locally important factors (e.g. water access, proximity to hospital etc).

- Employment land protection policies which distinguish between sites identified in the LDF and other employment sites.
- Well defined criteria for allowing change of use. These criteria can be very strict for identified employment areas and less for other employment locations[30].
- Employment protection policies and the criteria for allowing change of use should be based on long term demand assessments and not on short term market considerations bearing in mind that market cycles can take several years.

8.17 The local planning policies should recognise the need for a variety of employment sites. The supply analysis has identified that the majority of the potential supply is concentrated within a limited number of large sites and there might be a need for the identification of additional smaller sites.

8.18 Planning policies should also recognise the importance of home working and live-work units to the local economy. This is especially true for the more rural parts of the sub-region.

RECOMMENDATION B: BALANCING DEMAND AND SUPPLY THROUGH ADEQUATE SUPPLY OF SITES AND PREMISES

8.19 Local planning authorities should aim to ensure that there is sufficient supply to meet the projected employment land demand. For this purpose the local planning authorities should work across borders to provide a balanced of supply and demand within functional economic areas (e.g. TTWAs).

8.20 The allocated supply should meet the demand in terms of overall quantity and provide choice with regards to size and location. Consideration should be given to specific needs of locally important sectors and sectors with potential for growth such as the finance and business services, marine sector and the aviation sector.

RECOMMENDATION C: INTERVENTIONS TO SECURE ADEQUATE SUPPLY OF SITES AND PREMISES

8.21 The allocation of the adequate amount of employment land is not sufficient to ensure the delivery of employment premises as the experience in the past has shown. A range of

[30] As this is the case in Bournemouth and in Poole

interventions is required to help to bring the required supply (including more smaller sites) forward. Priority should be given to:

- The delivery of **sites with little constraints** (see the Delivery Plan) through strong planning policy (see Recommendation A), planning instruments (e.g. development briefs, masterplans etc) and marketing. Where appropriate, mixed uses may be necessary to achieve viability and ensure delivery.
- **Site level intervention** where the market alone will not deliver the required employment sites. This can be in the form of local infrastructure provision or dealing with abnormal costs (see also the Delivery Plan further detail).
- **Sub-regional interventions** to increase the attractiveness of the area as a place to do business. This could include improvements to the strategic road infrastructure, improvements to the rail service, creating attractive town centres, provision of a housing offer in line with the economic aspirations, a pro-active and coordinated approach to inward investment promotion and raising the skills levels and expanding the higher and further education offer (for more details see the Delivery Plan).

RECOMMENDATION D: LONG TERM PLANNING FOR REGIONAL INFRASTRUCTURE

8.22 Infrastructure planning for housing and for economic development has been somewhat disjointed in the past. A holistic approach to planning for housing and employment is required. There is a need to progress infrastructure requirements for economic development as well as housing growth. A more coordinated approach can make better use of existing and planned funding and delivery mechanisms such as CIL, RIF and MAA. This is particularly pertinent in relation to planning for the urban extensions. Priority should be given to infrastructure improvements which have the potential to unlock key sites (e.g. A31).

RECOMMENDATION E: OFFICE

8.23 A focus should be given on the delivery of office premises in the sub-region. Geographically larger scale office developments should be focussed on the town centres of Bournemouth and Poole, where there is good public transport access, a large labour pool and where office development can contribute to the town centre function of these places.

8.24 Furthermore there should be a focus on providing good quality affordable office space in the Dorchester & Weymouth TTWA to support an increase in private sector employment and lessen the areas dependency on public sector employment.

8.25 Across the sub-region smaller scale office development in market towns should be supported to provide local employment and reduce the need for travel.

RECOMMENDATION F: URBAN EXTENSIONS

8.26 Within the proposed urban extensions support should be given to the inclusion of employment areas. However we acknowledge the apparent priority for the RSS will be to meet the housing figures ahead of accommodating employment growth alongside in the identified areas of search (with the exception of Ferndown). The amount and type of employment provision within the urban extensions should consider the needs of the wider area (functional economic area) and might where appropriate extend well beyond the employment demand arising from the new population within the urban extension. The function of urban extensions should be regarded as being wider than solely the provision of housing and local services and their contribution to wider economic development should be considered as part of a comprehensive masterplanning approach.

RECOMMENDATION G: TOWN CENTRE DEVELOPMENT

8.27 Continues improvement of the town centres in the sub-region will help to improve the market conditions for town centre (office) employment. Furthermore town centre regeneration can be a mechanism to help deliver town centre office development as part of mixed use schemes[31].

8.28 A priority should be the continued improvement in town centres. Attractive town centres increase overall market attractiveness of the sub-region. It will also help to deliver office developments (as stand alone or as part of mixed use developments), for which there is a long term demand and limited supply.

RECOMMENDATION H: WHOLE ECONOMY APPROACH

8.29 As shown in Chapter 4 and 5 a significant part of the projected employment growth is in Non-B-Use-Class employment. Local planning authorities need to recognise that in their planning documents and in their approach to planning for employment. In this sense PPS4 encourages the adoption of a greater level of flexibility for employment allocations made through the plan process, encouraging less restrictive policies when making Use Class designations.

8.30 South West RDA has commissioned GVA Grimley to undertake further research into the spatial implications of employment growth in Non-B-Use-Class employment. The research will

[31] As is the case for example in Poole

give some strategic guidance and help to improve the understanding of the implications for planning.

RECOMMENDATION I: MONITORING

8.31 The demand and supply assessment in previous Chapters has been based on the information currently available. Circumstances can always (and most likely will) change over the next 20 years. Ongoing monitoring of demand and supply is therefore important. The local planning authorities in the sub-region have established a good partnership and joint approach for assessing employment land. This should continue. The recording of available land and the assessment of the likely timescale this might come forward could be improved and further harmonised.

8.32 With regards to specific sites there are significant levels of uncertainty at Winfrith and at Bournemouth Airport[32] which both need close monitoring. In both cases there is an undersupply of employment land projected in the respective TTWA (unless the Ferndown RSS Area of Search for 20ha employment comes forward) and the sites not coming forward would result in further supply constraints in the two TTWAs.

[32] For the demand and supply balance we have assumed a long term supply of 15 ha at the Airport and a medium term supply of 5 ha at Winfrith.

South West Regional Development Agency

Bournemouth Dorset Poole Workspace Strategy and Delivery Plan

B – THE DELIVERY PLAN

9. INTRODUCTION

9.1 Section A of the Workspace Strategy has identified the overall demand and supply and the gaps in the supply balance. This has been done on a TTWA level. A district and unitary authority level supply and demand analysis is provided in Appendix D.

9.2 The delivery plan focuses on how to bring the available employment land forward. In Chapter 10 potential delivery mechanisms are discussed on a more generally: 1) on a sub-regional level on how to improve the market attractiveness of the sub-region, which should help to deliver the employment sites and 2) on a site level.

9.3 Chapter 11 then discusses how to improve the delivery situation of key sites in the sub-region. The districts and unitary authority have identified 27 key sites on which the delivery plan focuses. Each district and unitary authority identified up to four sites within its boundaries. Priority was given to sites which have significant amounts of available land and which are relatively large in relation to the other available sites in each district / unitary authority.

9.4 The key sites have been grouped according to the main constraints they face and how these could be addressed. Recommendations for site by site intervention are given in Appendix B where all of the key sites are assessed.

10. DELIVERY MECHANISMS

10.1 Direct site interventions can clearly be an important measure and will be discussed in more detail later in this Chapter and in Chapter 11. However, there is also a wider aspect which has to be considered. The economic growth aspirations for the Region are ambitious and the sub-region needs to increase its attractiveness as an employment location in general if it wants to meet these aspirations.

10.2 The focus of this Strategy is on the site specific recommendations. However, we believe it to be appropriate to also consider more general sub-regional interventions to improve the attractiveness of the sub-region. We do this first before moving to set out the possible site specific interventions.

SUB-REGIONAL INTERVENTIONS

10.3 It is important to understand why companies want to locate in the Bournemouth, Dorset and Poole area. The sub-region has a very high level of quality of life; it is set in a fantastic environment and has some amazing coastline. The sub-region has an international airport and good train connections to London. The access to water is a unique selling point for the sub-region. On the other hand labour supply and road access are an issue for the sub-region with poor access to the national motorway system and a tight labour market with skills levels only in North and West Dorset significantly over the national average.

10.4 **Improvement to the strategic road infrastructure** is paramount for the delivery of employment sites. This is not in the hands of South West RDA and the local authorities. However, continuous lobbing for improvement to the strategic road infrastructure network which could unlock specific sites and in general improve demand for (and viability of) employment land is required.

10.5 The Community Infrastructure Levy (CIL) might be an instrument to help fund infrastructure requirements. Part 11 of the Planning Bill, which at the time of writing this Strategy is before Parliament, will form the legislative bases for CIL. In August 2008 CLG has published a policy document which sets out how CIL will work.

> *The Community Infrastructure Levy (CIL) will be a new charge which local authorities in England and Wales will be empowered, but not required to charge on most types of new development in their area. […] The proceeds of the levy will be*

spent on local and sub-regional infrastructure to support the development of the area.[33]

10.6 One of the key benefits of the CIL is that it can more easily fund sub-regional infrastructure. The Regional Spatial Strategy (RSS) "is likely to identify these infrastructure requirements, which can therefore be cascaded down into local development plans."[34]

10.7 **Creating attractive town centres** in the main conurbation of Bournemouth and Poole will also contribute to increasing the market conditions such as rentals and market perception for commercial development. This is already ongoing (Bournemouth regeneration of Lansdowne, Poole Town Centre regeneration) and should be given a high priority. Initiatives such as Revitalising Poole's Town Centre can help to deliver a step-change in the local economy.

10.8 A **pro-active and coordinated approach to inward investment promotion**, including promoting sites, would contribute to the delivery of sites[35]. The RDA is currently leading on inward investment promotion. Any sub-regional investment promotion activities should be closely coordinated with South West RDA's activities and set out in an **Inward Investment Strategy**. There are some valuable reasons for setting up a sub-regional investment agency as has been demonstrated in other sub-regions (as for example in Somerset and Kent). The main advantages of a sub-regional investment agency are summarised below:

- The RDA's investment promotion activities are limited to foreign direct investment (FDI). RDAs are not allowed to target UK movers. However, a sub-regional investment agency could target UK movers.
- A sub-regional investment agency can also raise the profile of the sub-region with the RDA and increase its success rate in attracting FDI.
- There are many important aspects of investment promotion such as aftercare, site availability, support with planning etc which are best delivered on a more local level than this could be done by the RDA.
- A sub-regional investment agency could be tied into the scope and agreed targets for the Multi Area Agreement across Bournemouth, Dorset and Poole.

10.9 Economic growth is not necessarily tied to land demand (with the exception of distribution and warehousing). The RES promotes a **sustainable economic growth which builds on improving productivity**. Increasing home working and remote working can also be a sustainable form of economic growth which results in very little land demand. This is especially important for the more rural areas of the sub-region.

[33] The Community Infrastructure Levy, CLG, August 2008
[34] The Community Infrastructure Levy, CLG, August 2008
[35] This is especially the case by attracting owner occupiers, who are not concerned about rental values on their own sites, in comparison to speculative developers who need sufficient high rental values to make a scheme viable.

10.10 Economic performance and the economic attractiveness of an area can not be seen in isolation of the **housing offer**. Providing housing which is attractive for the working age population is an important economic driver. This can be town centre flats for the young workforce and modern, high quality houses for young families.

10.11 Raising the **skills levels and expanding the higher and further education offer** will also improve the attractiveness of the sub-region for inward investment. The report on the future role of employment at Bournemouth Airport[36] has identified a significant expansion of Bournemouth University's scientific, engineering or ICT specialisms as a potential contributor to a step change in the sub-regions economy.

SITE LEVEL INTERVENTIONS

10.12 The local authorities could engage in a more **pro-active dialog with land owners**. Throughout our research we have noted that local authorities not always are fully aware of site specific information and aspirations of the land owners. An improved pro-active dialog would provide the local authorities with important site relevant information which would allow them better to market the employment land offer in the district / unitary authority. A more pro-active communication with site owners would also ease the planning process of sites and reduce hope value on sites.

10.13 Uncertainty is a major barrier to development. **Increasing planning and market certainty** helps to deliver development. This can be achieved (and is regularly practiced throughout the sub-region) through planning brief, Supplementary Planning Documents (SPD), or Area Action Plans (AAP). To increase planning certainty also helps to give market certainty. Through the respective planning documents site specific issues can be raised and clear criteria defined on how to over come obstacles to development. The local planning authorities' role however should not end there. Actively liaise with the likes of the Highway Agency, Natural England etc and supporting developer in negotiating acceptable solutions with these agencies will help the delivery of employment sites. Site and area specific planning documents can also help in marketing a site.

10.14 Developer contributions are an important contributor to infrastructure delivery. However, **developer contributions have to be formulated and negotiated with care**. It is not always reasonable to burden the last development which triggers the need for new infrastructure with its entire cost. The CIL approach seems in this respect a fairer and more transparent approach and its adoption throughout the sub-region should be encouraged. Employment development also contributes to the wider benefits of the community and has a positive effect

[36] The Future Role of Employment at Bournemouth Airport for the Sub-regional Economy, Nathaniel Lichfield & Partners, 2008

on the local economy. This should be taken into consideration when negotiating developer contributions.

10.15 In specific circumstances and under careful considerations **allowing enabling development** on employment sites can help bring sites forward[37]. However, this has to be considered carefully and can only be applied where appropriate. On many employment sites in the sub-region residential enabling development is for example not possible due to the heathland restrictions. Other enabling development like care homes, hotels and leisure developments might be acceptable in some of these cases.

10.16 An **innovative approach to site assembly** could also help deliver employment premises. Packaging sites for higher value uses (e.g. retail, leisure, residential) with employment sites to cross subsidise infrastructure and enabling costs can help deliver employment development[38].

10.17 For sites which face severe constraints to development, but would provide some significant local and regional economic benefits if developed as employment sites, **site assembly and acquisition** (if necessary through CPO), remediation, infrastructure provision and carrying out of enabling works will be required. Where sites are suitable for mixed use developments a joint purchase through English Partnerships[39] and South West RDA could be considered.

[37] As for example has happened in the Landsdowne area in Bournemouth
[38] This has for example be done in Bexhill North, Rother District
[39] Or its successor organisation the Housing and Communities Agency

11. KEY SITES

11.1 In close cooperation with the districts and unitary authorities 27 key sites have been selected for a closer assessment. Sites have been identified as key sites if they were vacant and available for development and if they were relatively large in the local context. Maps showing the location of key sites are given in Appendix G.

11.2 Each site was discussed in detail with the local planning and / or economic development officer and visited by the consultants. **An assessment of each site and possible site level interventions are provided in Appendix B**.

11.3 This chapter provides a framework on how to bring sites forward based on the main constraints they face. The framework is illustrated using the key sites as examples. However the principles discussed in this chapter can be applied to any other site facing similar constraints.

11.4 Four main constraints have been distinguished and the key sites grouped accordingly:

- Good quality sites with little constraints
- Good quality sites with locational challenges
- Sites with local physical constraints
- Sites with regional infrastructure constraints

11.5 Most sites face a range of constraints and do not fall fully within one of the categories. The key sites have been assigned to one of the categories according to the main constraint they face.

11.6 For each site category a range of interventions and delivery mechanisms which can help bringing the sites forward are discussed.

GOOD QUALITY SITES WITH LITTLE CONSTRAINTS

11.7 We have identified 14 sites which we perceive as having little overall constraints to delivery (Table 28). They amount to a total area of 61 ha. The sites are readily available for development, are well located in terms of access and have relatively few overall constraints.

11.8 The main constraints these sites face are the market conditions impacting on the viability of the sites[40] and owner aspirations which might not be in line with the current planning policy.

Table 28 – Key Sites with Little Constraints

Site	District / Unitary Authority	Available Land Area
Lansdowne (Sites A, B, C)	Bournemouth	2.8
Castle Lane East (Deansleigh Road)	Bournemouth	0.9
BAE	Christchurch	8.0
Land south of A30	North Dorset	6.2
Land at Siemens Site, Sopers Lane	Poole	4.5
Sterte Avenue West, Sterte	Poole	5.1
Holton Heath Industrial Estate, Holton Heath	Purbeck	10.4
Dorchester, Poundbury South	West Dorset	2.1
Dorchester, Poundbury North	West Dorset	3.9
Chickerell, Putton Lane	West Dorset	4.0
Chickerell, Radipole Lane	West Dorset	4.2
Mount Pleasant Business Park	Weymouth & Portland	8.4
Total		**60.5**

Source: GVA Grimley

11.9 These sites are the key sites with the highest likelihood of delivery in the sub-region. Improving planning and market certainty will help to bring these sites forward. In a first instance these sites need to be **strongly protected for employment uses through the LDF process**.

11.10 Developing **planning briefs** for these sites (where this has not already happened) will help further increase planning and market certainty. Through viability assessments the level and type of **acceptable mixed use / level of enabling development should be established**[41] (which might be none) and reflected in the planning briefs. Where employment development is part of a mixed use development it is important that the employment element is required to be front loaded or at least clearly phased in a way that not all the higher use elements of the mixed used development can be built out before the employment development is completed.

11.11 These sites have little constraints and are in many respects the 'best' sites in the sub-region. They should be **actively marketed** through SWRDA, the local authorities and possibly a sub-regional inward investment promotion organisation as part of a coordinated inward investment strategy.

[40] As mentioned earlier this is especially important for speculative development but less so for development by owner occupiers.
[41] Some of the sites are already foreseen for mixed use developments

GOOD QUALITY SITES WITH LOCATIONAL CHALLENGES

11.12 The key sites in this category are are readily available for development but face market constraints due to their peripheral location.

Table 29 – Key Sites with Locational Challenges

Site	District / Unitary Authority	Available Land Area
North Dorset Business Park	North Dorset	4.4
Winfrith Technology Centre, Winfrith	Purbeck	n/a
Osprey Quay	Weymouth & Portland	8.1
Total		n/a

Source: GVA Grimley

11.13 The aim of bringing these sites forward is to allow for local employment and to reduce the need for car based long(er) distance commuting. In the case of Winfrith and Osprey Quay there is also a case of making best use of existing brownfield land.

11.14 In all of these sites either South West RDA (North Dorset Business Park, Osprey Quay) or EP have been actively involved in delivering the sites. The first phase of North Dorset Business Park has been developed by South West RDA with Olives Et Al as an 'anchor' tenant lined up. Winfrith has been acquired by EP who have now selected a preferred development partner. Masterplanning for the site is currently ongoing. Osprey Quay was bought by South West RDA which undertook enabling works for the site and is now promoting the site.

11.15 The market on its own does not seem to bring such sites forward. One approach of delivering sites which do face locational challenges is to turn their locational disadvantages into an advantage. This means that on a site by site base a use should be found which fits the specific locational circumstances. This can be challenging, associated with risks, time consuming and costly which will detract the private sector. **Public sector intervention** therefore seems justified.

11.16 Osprey Quay, with its water side location and the planned leisure marina has a natural pull for marine related activities. Its relatively poor location can be compensated by making it a 'destination' or cluster for marine related activities. This will be helped by having the sailing competition of the 2012 Olympics on the site, which will raise the profile of the site nationally and internationally.

11.17 North Dorset Business Park is located in a rural area. Identifying economic activities that are strongly linked to the country side and developing a 'cluster' of such activities at the Business Park might help to bring the second phase of the Business Park forward. We understand that the South West RDA considers supporting the development of a 'food cluster' at the business park. With Olives Et Al already on the site and a growing market for authentic, locally grown and processed food this might be a promising approach. Rural Dorset seems a good location for such an approach (as the very successful Dorset Cereals[42] brand illustrates).

11.18 Winfrith is a very large site (possibly up to 20 ha of employment land) at a fairly remote location. Identifying a use or a mix of uses which turns this remote location into a unique selling point will be a challenge. We understand that for example a cluster for environmental technologies has been discussed as a possibility. So far EP has been the main public body involved in the site having acquired the site in 2004. We recommend that South West RDA with its economic development experience pro-actively supports the private developers of the site in identifying appropriate employment uses for the site and helps to promote the site for such uses.

SITES WITH LOCAL PHYSICAL CONSTRAINTS

11.19 The key sites in this category all face specific local physical constraints. This includes access, environmental, landscape and other constraints. Of the 27 key sites 9 fall within this category. Together they account for 73 ha of available employment land which is over a third of the total identified available employment land in the sub-region.

Table 30 – Sites with Physical Constraints

Site	District / Unitary Authority	Available Land Area
Castle Lane East (Riverside Avenue)	Bournemouth	6.0
Aviation Park (parts)	Christchurch	15.0
Ferndown, East of Cobham Road*	East Dorset	8.4
Brickfields Business Park	North Dorset	11.7
The Brewery & Stour Park	North Dorset	6.0
Hamworthy Combustion, Fleets Corner	Poole	6.3
Admirality Park	Purbeck	12.7
North Broadwindsor Road, Beaminster	West Dorset	3.7
Sherborne, Barton Farm	West Dorset	3.5
		73.3

*Source: GVA Grimley *Since this supply analysis was undertaken, a resolution has been reached with the Highways Agency and planning granted subject to a Section 106 Agreement, off site physical infrastructure works are still however required to bring this site forward.*

[42] Dorset Cereals' strap line is "honest, tasty and real" which has a very subtle and modern link to the 'honest and real' countryside

11.20 Each of these sites faces its own specific constraints which are described in Appendix B and where possible interventions for each site are discussed individually. An overview of the possible interventions for sites facing local constraints is given below.

11.21 There are two main reasons why local constraints stop employment development coming forward: 1) they increase the uncertainty and the risk of a potential development and 2) they incur abnormal costs.

11.22 As discussed earlier (paragraph 10.13) there are several ways how the planning authorities (and other bodies) can **increase planning and market certainty**. Depending on the size of the site and the scale of the constraints different planning tools are available to reduce the risk and increase certainty. They include planning briefs, site specific Supplementary Planning Documents, Area Action Plans and/or treatment of the site in the LDF Core Strategy. The planning documents help to increase certainty by:

- **Identifying the local constraints.** This often requires some baseline and background research which can be provided by the local authorities. Future developers can build on this information which will not only reduce the risk but also save time and costs for the developer.
- **Clearly defining the required measures to overcome the site constraints.** This will give a potential developer an understanding of what is required and expected. The measures set out in the planning document should be complete and not added to at later stages. This requires a sound clarification with all relevant bodies (e.g. HA, Natural England, utilities providers etc).
- **Estimating abnormal costs.** This will give potential developers a better understanding of the development costs and the viability of a potential scheme. Again this can be time consuming and costly and if the local authorities are able to provide this information up front this will reduce the developers costs.

11.23 For very complex sites masterplans can be developed which illustrate how a development can overcome site constraints and still be viable. Such masterplans can be incorporated and adopted as official planning documents.

11.24 Local constraints also increase the costs of development. The increase of costs as a result of local constraints has two effects: 1) it reduces the overall viability of a scheme and 2) it often poses cash flow issues with abnormal costs accruing at an early stage of the development. There are different measures how the local planning authorities, South West RDA and other bodies can contribute to overcome and contribute abnormal costs. These include:

- **Target mainstream funding to overcome site specific abnormal costs**. This can be the case for example with regards to highway constraints, public transport, flood risk etc.
- **Allow enabling development.** However, this has to be considered carefully and can only be applied where appropriate. Careful consideration will need to made with regards to potential heathland restrictions (400m buffer zone) for residential development and retail planning policies will need to be carefully considered for out-of-centre locations.
- **Forward-funding of required infrastructure investments.** South West RDA's Regional Infrastructure Fund (RIF) can help ensure the timely delivery of infrastructure projects, where anticipated private funding (developer contributions) will not be available when the infrastructure is needed. The forward-funding can then be recouped from private sector developer contributions which in the future might include CIL. EP has engaged in a similar forward-funding project in Bedford. In the case of mixed use developments (and especially the urban extensions) a joint approach between South West RDA and EP might be considered.

11.25 Bringing these different funding streams together can be complex and deterring for private developers. Support in packaging the different funding streams can help developers and trigger private investment.

SITES WITH REGIONAL INFRASTRUCTURE CONSTRAINTS

11.26 Of the key sites two have been perceived as being constraint by regional infrastructure constraints.

Table 31 – Sites with Regional Infrastructure Constraints

Site	District / Unitary Authority	Available Land Area
Aviation Park (parts)	Christchurch	43[43]
Land between Ferndown and A31	East Dorset	n/a
		n/a

Source: GVA Grimley

11.27 There are no short term solutions to sites facing regional infrastructure constraints. A mix of lobbing mainstream funding bodies (e.g. Highway Agency) and long term planning might help to bring such sites forward.

[43] The 43 ha at Aviation Park constraint by regional infrastructure shortcomings have not been included in the demand and supply analysis as the uncertainty regarding the delivery of that amount of development at the site as been deemed to be to big. Further work to be commissioned by Christchurch BC will consider the upper most limits of development that could come forward at the Airport.

11.28 A combination of mainstream funding, the RIF and CIL could help to overcome regional infrastructure constraints. This requires long term strategic planning with the relevant infrastructure investments identified in regional, sub-regional and local strategies and planning documents. The Regional Single Strategy approach, which is likely to come forward in the future, will provide an instrument to better coordinate between housing and employment growth and will provide the opportunity to identify infrastructure requirements for economic growth

12. RECOMMENDATIONS AND ACTION PLAN

RECOMMENDATIONS

12.1 Across the study area the general focus should be given to the following:

- **Recommendation A: Employment Land Policies**: Planning documents should identify all regionally and locally important employment sites and include appropriate employment land protection policies and define where mixed use packages could be appropriate to ensure delivery .

- **Recommendation B: Balancing Demand and Supply through Adequate Supply of Sites and Premises:** For this purpose the local planning authorities should work across borders to provide a balanced of supply and demand within functional economic areas (e.g. TTWAs).

- **Recommendation C: Interventions to Secure Adequate Supply of Sites and Premises**
  A range of interventions is required to help to bring the required supply (including more smaller sites) forward. Priority should be given to the delivery of key sites with little constraints, site level intervention where the market alone will not deliver the required employment sites and sub-regional interventions to increase the attractiveness of the area as a place to do business.

- **Recommendation D: Long Term Planning for Regional Infrastructure**
  There is a need to progress infrastructure requirements for economic development as well as housing growth. A more coordinated approach can make better use of existing and planned funding and delivery mechanisms such as Community Infrastructure Levy (CIL), Regional Infrastructure Fund (RIF) and Multi Area Agreement (MAA).

- **Recommendation E: Office:** A focus should be given on the delivery of office premises in the sub-region, with a particular emphasis on provision at town centres in the conurbation and Dorchester:Weymouth.

- **Recommendation F: Urban Extensions:** Within the proposed urban extensions support should be given to the inclusion of employment areas as part of properly masterplanned, mixed use schemes, although we acknowledge at this stage an employment element is not always proposed to be included within the extensions within the RSS.

- **Recommendation G: Town Centre Development:** A priority should be the continued improvement in town centres. Attractive town centres increase overall market attractiveness of the sub-region and can help support office development and wider jobs growth.
- **Recommendation H: Whole Economy Approach:** Local planning authorities need to recognise in their planning documents and in their approach to planning that a significant part of employment growth will come from Non-B employment or employment.
- **Recommendation I: Monitoring:** Circumstances can always (and most likely will) change over the next 20 years. Ongoing monitoring of demand and supply is therefore critical.

ACTION PLAN

12.2 Detailed appraisals of the key sites (full details of which are contained as Appendix B) have been undertaken and a number of intervention measures agreed with the respective local authorities and the South West RDA. These intervention measures are translated into the Action Plan (Table 32) below:

Site / Area	Action	Lead Organisation	Timeframe (by)
Castle Lane East, Riverside Avenue, Bournemouth 6ha	(i)Costing of required junction improvements and independent appraisal.	Trokia (Owner)/ Bournemouth BC/ SWRDA.	6 months from completion of Trokia appraisal.
	(ii)Discussions with Christchurch BC and consideration of infrastructure requirements through Multi Area Agreement.	Bournemouth BC, Christchurch BC, SWRDA.	6 months from completion of Trokia appraisal.
	(iii)Consideration of options to minimising impacts on highways network.	Trokia, Bournemouth BC	6months from completion of Trokia appraisal.
Castle Lane East, Deansleigh Road, Bournemouth 0.9-2ha	(i)Continued dialogue with Teachers Assurance.	Bournemouth BC	Immediate
	(ii)Development brief if outline permission expired.	Bournemouth BC	Immediate confirmation of status of planning.
Lansdowne Area C, Cotlands, Bournemouth 1.4ha	(i)Planning Brief.	Bournemouth BC	12 months
	(ii)Confirmation of ownerships and bring owners together. Confirm if need private car park to make scheme viable.	Bournemouth BC	3 months
	(iii)Potential involvement of Bournemouth Regeneration Company	Bournemouth Regeneration Co.	TBC following formation of company.
Lansdowne Area B, Oxford Rd, Bournemouth 0.3ha	(i)Planning Brief.	Bournemouth BC	12 months
	(ii)Confirmation of ownerships and bring owners together. Confirm implications for parking strategy.	Bournemouth BC	3 months
	(iii)Potential involvement of Bournemouth Regeneration Company	Bournemouth Regeneration Co.	TBC following formation of company.
Landsdowne Area A, St Pauls, Bournemouth 0.8ha	(i).Involvement of Bournemouth Regeneration Company.	Bournemouth Regeneration Co.	TBC following formation of company.
BAE Site, Christchurch 8ha	(i)Strong policy protection of site for employment purposes (although with flexibility within B use classes).	Christchurch BC	Immediate
	(ii)Development Brief plus site investigations (if required)	Christchurch BC / Owner.	6 months following discussions with owner.
Aviation Park East and West, Bournemouth Airport 59ha net developable	(i)Costing of preferred bypass alignment (following Land Use consultants report and Peter Brett's study)	Christchurch BC / Airport Owners	6 months from findings of studies.
	(ii)Bring forward strategy from Nathianiel	Christchurch BC / Airport	Short to long

	Lichfield study.	Owners	term options.
	(iii)Investment in major services including electricity and drainage.	Airport Owners	12 months
	(iv)Brand led marketing campaign.	SWRDA / Airport Owners	12 months
	(v)Developing linkages with higher education institutions.	SWRDA / Airport Owners	12 months
	(vi)Early provision of attractive amenities/ services.	Airport Owners	1-2 years
	(vii)Confirmation through Core Strategy and SPD for phasing and masterplanning.	Christchurch BC	1-2 years
Ferndown Industrial Estate – East of Cobham Rd. 8.5ha	(i)Resolution of the Section 106 Agreement.	Applicants / East Dorset	6 months
	(ii)Extended period of consent for implementation (3years +).	Applicants / East Dorset	6 months
	(iii)Independent appraisal of infrastructure costs and travel plan (if 106 not resolved and negotiations required or development becomes unviable).	East Dorset / SWRDA / Highways Agency / Applicants	Immediately if required.
RSS Area of Search North West Ferndown 20ha	(i)Full masteplan approach and recognition through LDF process.	Owners / East Dorset	2-3 years
	(ii)Exploration of funding opportunities for infrastructure.	Owners / East Dorset / SWRDA	2 years
	(iii)Agreement of A31 capacity solution with Highways Agency.	Highways Agency / Owners / East Dorset	2 years
	(iv)Exploration of environmental risks	Owners / East Dorset / Natural England	2 years
The Brewery, Blandford 6ha	(i)Retain vacant plot to rear of Tesco for employment and provide development brief if required.	North Dorset	Immediate
	(ii)Pro-active engagement from public sector with owner to support owners to bring site forward.	North Dorset	Immediate
North Dorset Business Park, Sturminster	(i)Strengthen access links to town centre from the site.	North Dorset / Public Transport Providers	2-3 years

4.4ha	(ii)Identify economic activities strongly linked to the countryside and develop cluster of activities to bring second phase forward. Potential to use public sector land holdings to catalyse development.	SWRDA / North Dorset / DCC	1-2 years
	(iii)Preparation of development guidelines.	SWRDA / North Dorset	6 - 12 months
	(iv)Investigation of formation of local trust.	SWRDA / North Dorset	6 -12 months
	(v)Consideration of land swap deals.	SWRDA / North Dorset / Dorset CC.	6-12 months
Land South of A30, Policy 6.2ha	(i) Relocation of travellers, remediation and land ownership issues.	North Dorset	6-12 months
	(ii)Sharing infrastructure costs (eg. Signal controlled junction) with residential development north of A30.	Developer / North Dorset	2 years
	(iii)Phased and possibly more consolidated approach possibly set out in a planning brief.	Developer / North Dorset	12 months
	(iv)Further consideration regarding the deliverability of the employment elements without the residential elements coming forward.	Developer	12 months
Brickfields Business Park, Gillingham 11.7ha	(i)Pro active dialog with the owners	North Dorset / SWRDA	6-12 months
	(ii)Planning brief	North Dorset / Owners	12 months
	(iii)Discussions with tenants on the existing business park	North Dorset	6-12 months
Kerry Foods, Sterte Avenue West, Poole 5.6ha	(i)Retain strong employment protection policies	Poole BC	Immediate
	(ii)Maintain communication with Kerry Foods	Poole BC	Immediate
Sopers Lane, Poole 4.5 of 13.5ha	(i)Site wide masterplan and development brief	Poole BC / Owners / Occupiers	12 months
	(ii)Retain strong employment protection policies	Poole BC	Immediate
	(iii)Early and committed sign up by all parties to masterplan approach	Poole BC / Owners / Occupiers	3-6 months
	(iv)Initial scoping work for the masterplan to provide flexibility that could be achieved between different uses.	Poole BC / Owners /	6-12 months

		Occupiers	
Hamworthy Combustion, Fleets Corner, Poole 6.5ha	(i)Site wide masterplan and development brief based on viability	Poole BC / Owners / Occupiers	12 months
	(ii)Retain strong employment protection policies	Poole BC	Immediate
	(iii)Early and committed sign up by all parties to masterplan approach	Poole BC / Owners / Occupiers	3-6 months
	(iv)Initial scoping work for the masterplan to provide flexibility that could be achieved between different uses.	Poole BC / Owners / Occupiers	6-12 months
	(v)Establish full aspirations of Hamworthy Combustion	Poole BC	3 months
Holton Heath Industrial Estate 10.4ha	(i)Protection of site for employment development.	Purbeck DC	Immediate
	(ii)Further engagement with landowners and if necessary open book appraisal exercise for viability.	Purbeck DC	3 months
	(iii)Short term guidance should be produced by the Council to confirm the level and triggers for financial contributions (if any) for infrastructure provision.	Purbeck DC	6 months
	(iv)Detailed consideration of specific transport improvements at Holton Heath to be drawn up and implemented.	Purbeck DC / Dorset CC / Developers	6months – 2 +years.
	(v)Consider aspirations of owner of adjacent Admiralty Park and whether comprehensive masterplan approach to both sites may assist in infrastructure provision.	Purbeck DC / owners of both sites.	6 months
Admiralty Park, Holton Heath 12.7ha	(i)Comprehensive assessment and master planning appraisal.	Purbeck DC / Owner	6 -12 months
	(ii)Scope for very limited enabling uses through conversion such as hotel / leisure could be explored.	Purbeck DC / Owner	6 -12 months
	(iii)Development of a masterplan and development brief.	Purbeck DC	6 -12 months
	(iv)Consideration of requirement for CPO of ransom strip between two sites.	Purbeck DC / SWRDA	12 months
	(v)Robust but implement able Green Travel Plan.	Purbeck DC / Owner / Occupiers	6-12 months
	(vi)Further engagement with landowners and if necessary open book appraisal exercise for viability.	Purbeck DC / Owner	6 months

	(vii)Short term guidance should be produced by the Council to confirm the level and triggers for financial contributions (if any) for infrastructure provision.	Purbeck DC	6 months
	viii)Detailed consideration of specific transport improvements at Holton Heath to be drawn up and implemented.	Purbeck DC / Dorset CC / Developers	6months – 2 +years.
Winfrith Technology Centre. 20ha	(i)The Council will need to ensure that the employment applications can be determined through the existing Local Plan in advance of the AAP being adopted.	Purbeck DC	Immediate
	(ii)Once masterplan available the Council will need to show a level of commitment for an initial phase of employment development.	Purbeck DC	Asap following publication of masterplan.
	(iii)Backing for support services to the employment development should also be demonstrated by the Council.	Purbeck DC / Owner / English Partnerships	Immediate
	(iv)Further engagement with landowners is required and where necessary an open book appraisal exercise to assess viability.	Purbeck DC / Owner / English Partnerships	3 – 6 months
	(v)Work to confirm proposed realistic options for addressing the highway infrastructure restraints including by pass options.	Purbeck DC / Dorset CC	12 months
	(vi)Development of 'green angle'.	Owner / English Partnerships	Immediate
	(vii)Working alongside landowner to promote incubation and innovation facilities and 'local' employment element to serve local market and SWRDA support.	Owner / English Partnerships / SWRDA / Purbeck DC / Dorset CC	2+ years 2+ years
Chickerell Site EA7(i), West Dorset 4.2 ha	(i)Strong policy stance on retention of employment land.	West Dorset DC	Immediate
	(ii)Pro-active involvement by public sector to engage landowner.	West Dorset DC / Dorset CC / SWRDA	3 - 6 months
Chickerell Site EA7(ii), West Dorset 4 ha	(i)Strong policy stance on retention of employment land.	West Dorset DC	Immediate
	(ii)Pro-active involvement by public sector to engage landowners and package sites together.	West Dorset DC / Dorset CC / SWRDA	3 - 6 months
Poundbury 6ha	(i)Strong policy stance on retention of employment land.	West Dorset DC	Immediate
	(ii)Pro-active involvement by public sector to engage landowners and package sites	West Dorset DC / Dorset	3 - 6 months

	together.	CC / SWRDA	
	(iii)Targeted marketing campaigns	West Dorset DC / Dorset CC	3 – 6 months
Barton Farm, Sherborne 3.5ha	(i)Independent masterplan appraisal	West Dorset DC	3 - 4 months following masterplan completion.
	(ii)Specific feasibility work on infrastructure requirements.	Owner / West Dorset DC / Dorset CC	12 months
	(iii)Public sector commitment to development guidelines.	West Dorset DC / Dorset CC	6-12 months
North of Broadwindsor Road, Beaminster 3.7ha	(i)De-allocate site from general employment designation.	West Dorset DC	As soon as planning policy framework permits.
	(ii)Further engagement with Clipper Teas for an updated position on potential expansion.	West Dorset DC / SWRDA	3 months
Mount Pleasant Business Park, Weymouth 8.4ha	(i)Continue with existing levels of engagement with the landowner New Look to ascertain aspirations and offer assistance where required.	Weymouth & Portland DC / SWRDA	3 months
Osprey Quay, Portland 8.1ha	(i)Continued development of access to the water.	Weymouth & Portland DC / SWRDA.	Immediate
	(ii)Full exploitation of marketing benefits of Olympics.	Weymouth & Portland DC / SWRDA	Immediate

Table 32: Key Sites Action Plan

South West Regional Development Agency

Bournemouth Dorset Poole Workspace Strategy and Delivery Plan

APPENDICES

A – AVAILABLE SITES

B – KEY SITES ASSESSMENT

C – REVIEW OF EXISTING EMPLOYMENT LAND FORECASTS

D – DISTRICT LEVEL DEMAND AND SUPPLY

E – ASSIGNING SECTORS TO LAND USE TYPES

F – MAPS OF AVAILABLE SITES

G – MAPS OF KEY SITES

A – AVAILABLE SITES

Local Authority	Address	Available Land (ha)	Phasing
Bournemouth	Castle Lane East (Riverside Avenue)	6.0	Short
Bournemouth	Wallisdown Road B (Proctor and Gamble)	3.4	Medium
Bournemouth	Poole Lane	1.5	Short
Bournemouth	Lansdowne (C - Cotlands)	1.4	Short
Bournemouth	Ashley Road Coal Yard	1.0	Medium
Bournemouth	Castle Lane East (Deansleigh Road)	0.9	Short
Bournemouth	Lansdowne (A - St Paul's)	0.8	Short
Bournemouth	Lansdowne (B - Oxford Road/Holdenhurst Road)	0.6	Medium
Bournemouth	Wallisdown Road A	0.3	Short
Bournemouth	Yeomans Road	0.1	Short
Christchurch	Aviation Park West	38.0	Long
Christchurch	Aviation Park East	20.0	Long
Christchurch	BAE	8.0	Short
Christchurch	Cimex International	1.8	Long
Christchurch	Gaswork Site	1.5	Long
Christchurch	Marine & Coastguard Agency Training Centre	1.3	Long
Christchurch	Fairmile Road / Vacant land at Avon Trading Park	0.7	Short
Christchurch	Baptist Church Site	0.5	Short
Christchurch	Grange Road	0.4	Medium
Christchurch	64 - 70 Bridge Street	0.1	Medium
East Dorset	East of Cobham Road	8.4	Short
East Dorset	Ebblake	0.5	Short
North Dorset	Brickfields Business Park	11.7	Short
North Dorset	South of A30	6.2	Long
North Dorset	The Brewery & Stour Park	6.0	Medium
North Dorset	Shaftesbury Lane	5.1	Medium
North Dorset	North Dorset Business Park	4.4	Short
North Dorset	Park Farm	4.2	Short
North Dorset	Blandford Heights & Clump Farm	1.5	Short
North Dorset	The Creamery Site	1.1	Short
North Dorset	Former Unigate Factory	0.9	Long
North Dorset	Faccenda Ltd	0.8	Short
North Dorset	South of Lilac Cottage	0.6	Long
North Dorset	Holland Way	0.5	Long
Poole	Hamworthy Combustion, Fleets Corner	6.3	Medium
Poole	Sterte Avenue West, Sterte	5.1	Medium
Poole	Land at Siemans Site, Sopers Lane	4.5	Medium
Poole	Land at St Clements Road/Old Wareham Road	2.9	Long
Poole	Area 2, Lings Road, Mannings Heath	2.7	Long
Poole	Former BT site, Yarrow Road	2.6	Short
Poole	Delta Commerce Centre	2.0	Short
Poole	Land north of Cabot Lane	1.6	Long
Poole	Yarrow Road, Mannings Heath	1.6	Medium
Poole	Wessex Water, Nuffield	1.4	Short
Poole	Banbury Road, Nuffield Industrial Estate	1.4	Medium
Poole	The Fulcrum, Vantage Way, Mannings Heath	1.4	Short
Poole	Land south-west of Mannings Heath Road	1.0	Medium
Poole	Land rear of Hatchpond Depot	0.9	Long
Poole	61 Ringwood Road	0.8	Medium

Local Authority	Address	Available Land (ha)	Phasing
Poole	The Fulcrum, Vantage Way, Manning Heath	0.7	Short
Poole	Land at rear of Sterte Industrial Estate, Sterte	0.7	Long
Poole	Units 3-5, Balena Close	0.6	Long
Poole	18-24 Fancy Road, Mannings Heath	0.6	Medium
Poole	Land at Sterte Avenue West, Sterte	0.5	Medium
Poole	Land south-west of Mannings Heath Road	0.5	Short
Poole	Witney Road, Nuffield Industrial Estate	0.4	Short
Poole	39 Commercial Road	0.4	Long
Poole	Park Place, North Road	0.3	Medium
Poole	Junction of Allens Lane & Blandford Road	0.3	Short
Poole	Former BG Site, Yarmouth Road	0.1	Medium
Purbeck	Winfrith Technology Centre, Winfrith	20.0	Medium
Purbeck	Admirality Park	12.7	Medium
Purbeck	Holton Heath Industrial Estate, Holton Heath	10.4	Medium
Purbeck	Victoria Avenue, Swanage	1.6	Long
Purbeck	North Street, Bere Regis	0.8	Medium
Purbeck	Wareham Road, Lytchett Matravers	0.4	Medium
Purbeck	Former Milk Depot, Corfe Castle	0.4	Medium
Purbeck	Confidential	0.3	Long
West Dorset	Chickerell, Radipole Lane	4.2	Short
West Dorset	Chickerell, Putton Lane	4.0	Short
West Dorset	Dorchester, Poundbury	3.9	Short
West Dorset	Beaminster, North of Broadwindsor Road	3.7	Medium
West Dorset	Sherborne, Barton Farm	3.5	Short
West Dorset	Sherborne Hotel	2.2	Medium
West Dorset	Dorchester, Poundbury	2.1	Short
West Dorset	Crossways, land to the west of Warmwell Road	2.1	Short
West Dorset	Bridport, Land adjoining St Andrews industrial Estate	2.0	Long
West Dorset	Puddletown, Northbrook	1.7	Short
West Dorset	Lyme Regis, Woodberry Down	0.9	Medium
West Dorset	Sherborne, Former Gas Depot	0.8	Long
West Dorset	Bridport, Land at North Mills	0.8	Short
West Dorset	Charmouth, Catherston Manor Farm	0.3	Short
Weymouth & Portland	Osprey Quay	19.4	Long
Weymouth & Portland	Mount Pleasant Business Park	8.4	Medium
Weymouth & Portland	Southwell Business Park	0.7	Medium
Weymouth & Portland	Tradecroft Industrial Estate	0.5	Short
Total		**289.3**	

B – KEY SITES ASSESSMENT

CONTENT

BOURNEMOUTH

CHRISTCHURCH

EAST DORSET

NORTH DORSET

POOLE

PURBECK

WEST DORSET

WEYMOUTH AND PORTLAND

Mount Pleasant Business Park (New Look)
Osprey Quay

BOURNEMOUTH	
SITE NAME	CASTLE LANE EAST, RIVERSIDE AVENUE
Size	Total: 6.0 ha / Available: 6.0 ha
Allocation	Allocated in Bournemouth Local Plan for B1 development
History	An appeal (outline consent) was allowed for the site to be developed for Class B1 offices, health care and nursing facilities (outline application). The proposal would provide over 30,000 sq.m. of office floorspace, however the permission is subject to the requirement of provision of a creation of new access to the site and the adjacent Park and Ride area via a new grade separated junction off the A338.
Strategic Access	Strategic access is good just off the A338.
Site Access	No existing access, a narrow lane runs adjacent to the site. Transport Officers have advised that it is now necessary to construct a grade separated junction on the adjacent A338 Wessex Way to serve B1 development on the site. The Employment Land Review confirms that the site is reasonably well served by public transport with 6 Yellow Bus routes and 3 Wilts & Dorset bus routes. Adjacent to the site is a Park and Ride proposal. Highways Officers question capacity on the A3060 and therefore a required new access to the A338 is required.
Internal Environment	A flat piece of land in agricultural use.
External Constraints	Site wraps around a retired nurse home adjacent to the site.
External Quality of Environment	Very good, adjacent to the green belt.
Access to Facilities	Very good, adjacent to Tesco Extra, hotel, health club and main hospital, also leisure centre across road.
Other Comments	
Suggested Intervention	The requirement for the grade separated junction may undermine the viability of the site and indications are that this is the reason for the site not being developed since the appeal decision (although subsequent reserved matters applications will be required first). We are informed by the Council that it was known that the site would require a grade separated junction before the application was made. This presumes that the site is viable if the access arrangements were partly met by the park and ride scheme provision.

We understand that the site owners Troika are completing their cost assessment and development appraisal which should be available shortly (potentially mid October). We assume that the appraisal will include costing of the junction provision and associated improvements already, however if not already undertaken we would recommend **costing of the required junction improvements and independent appraisal** of the development to ascertain whether or not the requirements render the proposals unviable. If the costing exercise reveals a viability gap there may need to be an improvement in yield currently available to close this gap. If this does not occur there will be a need to revisit the cost of the infrastructure options for the site.

Local agents however have also raised the possibility of land ownership issues as a potential hurdle to required infrastructure delivery. We understand that the land ownership issue relates to ownership of access land by Christchurch Borough Council (which actually falls within the Bournemouth administrative boundary) and their requirement to seek a proportion of the land value in relation to the sale of this land.

Further **discussions are therefore required with Christchurch Borough Council** to achieve land assembly. We understand that Troika have met with CBC to discuss the principle of acquiring the land (Aug 08). An agreement has not yet been reached and this would be subject to a member decision. A further option for the release of this land by CBC maybe possible as an element of a **'package of employment measures' through the Multi Area Agreement.**

Should the site still not be delivered in the short to medium term, then long term future options may depend on the status of the Areas of Search within the RSS regarding the northern expansion of Bournemouth. At present time we understand that the Area of Search is not be supported politically by Bournemouth BC. However if the Area of Search is taken forward (which if it did will still be some way off), one such intervention measure could be to include the provision of the grade separated junction to the infrastructure package of improvements required to serve the Areas of Search development. We understand that the Castle Relief Road has limited political support but highways officers have confirmed that a new road in some form will be required should Bournemouth be expanded to the North. Whilst it appears unlikely at the present time we would highlight this as a long term option if the Riverside Avenue site still hasn't come forward. Further investigation into front funding for example by a body such as English Partnerships (provided that residential development was part of the Northern Expansion of Bournemouth) and then recouped through Section 106 agreements or CIL. Although there might be scope for funds raised to contribute to economic development activity it is unlikely unless from a strategic development site that they will be sufficient to fund major projects such as this, nor used to gap-fund a development. This approach would (a) find a way of forward funding the grade separation and (b) spread the cost among a much larger development area.

Further options would include **focusing on a development that would result in minimal impact on the highways network**, i.e. rather than amending the junction focus on **developing very strong green travel plans** and seeking to reduce the need to travel by private car to the development. However concerns regarding the monitoring and enforceability of green travel plans will need to be addressed, particularly with regards to parking on adjacent residential roads which was acknowledged in the previous application by increasing the amount of on-site car-parking within the proposal. The market implications of reduced parking provision would also need to be assessed as we are informed that car parking is currently a vital component in the viability of any office provision in the area.

	Subject to negotiations with Bournemouth BC regarding the consented scheme an alternative means of access could be looked at if land can be assembled. The results of the Troika development appraisal and implications for viability will provide further clarification on this matter and may bear out other options.
Images	 
SITE NAME	CASTLE LANE EAST, (DEANSLEIGH ROAD)
Area	Believed to be 0.9ha – 2ha available of wider 8ha site now built out.
Allocation	Allocated in Bournemouth Local Plan for B1 employment development with potential leisure although we understand the Council would prefer B1 uses on the site.
History	Site believed to have been previously reserved by owners Teachers Assurance Group who have headquarters on adjacent land for expansion. Teachers Assurance (Secretary to Roy Spragg Finance Director) have however since confirmed over the phone that the land is not being sold (05/08/08). We are informed by Bournemouth Borough Council that a consent was granted in 1998 however it is not clear whether this permission is still extant. However the general consensus appears to be that the permission is valid and as the site is allocated for development then an employment scheme would not be contentious. We understand the nearby junction improvements within the last 12 months should have also accounted for the capacity of potential development coming forward on this site.
Strategic Access	Strategic access is good just off the A338.
Site Access	Good access off the A3060 with no access constraints to site. However consideration would need to be made with regards to any potential capacity issues with junction shared with the access to Bournemouth Hospital.
Internal Environment	Flat piece of land although questionable ground levels which require clarification. Also apparent reptile survey work underway on site highlighting potential for species which may require ecological mitigation measures and potentially affect development density.
External Constraints	Bournemouth BC have confirmed that the site is partially developed (i.e. the wider development) and thus has no planning constraints exist (i.e. linked to Wessex Fields).
External Quality of Environment	Very good. Area adjacent to Hospital with mixed use including office, law courts and hotel.

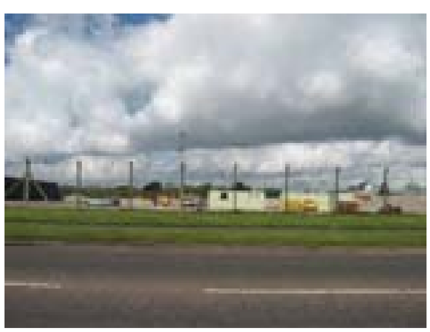
Access to Facilities	Good. There is a Tesco, health club and hotel next to the site.
Other Comments	Questions regarding the levels of the site and ground stability (i.e. confirm if site is made up ground) as the site seems to be slightly raised above the surrounding area and includes drainage ditches.
Suggested Intervention	Continued **dialogue with Teachers Assurance** to ascertain future plans and strong protection in planning policy terms for employment development. Assuming no highways capacity issues and existing outline permission still valid there are no obvious issues of contention in bringing this site forward. However if outline permission has expired then **development brief** for site could be prepared to provide certainty in terms of uses, heights and footprints.
Images	 
SITE NAME	LANSDOWNE AREA C, COTLANDS
Area	Total: 6.2 ha / Available: 1.4 ha
Allocation	Allocated in Bournemouth Local Plan for B1 employment development.
History	Planning history unknown but current use of vacant plots is car parking. Multiple ownerships (Bournemouth BC own two car parks) and both private and public car parking. Christchurch Road site has planning permission for 100,000 sq.ft. office scheme.
Strategic Access	Very good. Public transport access very good. Close to Bournemouth Station and the Travel interchange located just off the A35.
Site Access	Currently not ideal but should be able to resolve with holistic development approach.
Internal Environment	Site currently used as car parks.
External Constraints	There are no obvious external constraints although part of site falls within the identified Lansdowne Parking restraint area.
External Quality of Environment	This is a mixed use office-led development surrounding the area with significant building heights up to 10 storeys.
Access to Facilities	Excellent - town centre location.
Other Comments	Developers say there is not the market viability for the amount of office development that could be delivered, on this basis an appeal was recently allowed with enabling development in the St Pauls area of Lansdowne. However, the Council believe that the 1 ha Cotlands Road car park site is

	probably the most viable of all the Landsdowne sites as falls within public ownership. The Savills Design and Development Report (2007) for the Lansdowne area makes a number of recommendations for the Cotlands Road site on the basis of attracting an international bank office development on 6-9 floors comprising 14,000 sq.m. office accommodation, 267 parking spaces (3 floors), plus 20-25 apartments.
Suggested Intervention	**Planning brief** potentially based on Savill's Report findings (although may need to adjust to take on board current residential market characteristics), to allow a mix of uses and create viability to deliver office accommodation which would not otherwise come forward due to market constraints. National policy guidance supports town centre mixed use development. Requirement to **confirm ownerships and get the multiple owners together** with one strategy. Also **ascertain whether need private car park to make scheme viable**. We are also aware of the potential forthcoming Bournemouth Regeneration Company and the Council's Cabinet Decision (20th February 2008) acknowledges that a number of Council assets including car parks could be transferred to the Company. We would recommend that the **Landsdowne area is a key project for the Bournemouth Regeneration Company** in line with one of the Company objectives which is to secure higher value employment in the town. Lansdowne is believed to be on the agenda for the Regeneration Company following consideration of the town centre sites. However, we understand that the Company will at least initially focus on Council owned land, therefore the recommendation for their involvement with privately owned elements of this site may not be suitable in the short to medium term.
Images	 
SITE NAME	LANSDOWNE, AREA B, OXFORD ROAD
Area	Total: 3.8 ha / Available: 0.3 ha
Allocation	The site falls within the wider Landsdowne office allocation within the Bournemouth Local Plan.
History	37/39 Oxford Road has a historic but extant consent (according to Bournemouth Employment Land Review Stage 1) for office development.
Strategic Access	Very good. Public transport access very good. Close to Bournemouth Station and the Travel interchange located just off the A35.
Site Access	Good. Immediate access off Oxford Road.

Internal Environment	Currently an unmade car park.
External Constraints	There are no obvious external constraints although the site falls within the identified Lansdowne Parking restraint area.
External Quality of Environment	The area comprises mixed use office-led development of predominantly 70-90s style accommodation comprising significant building heights.
Access to Facilities	Excellent town centre location.
Other Comments	Developers say that there is not the demand for offices in this location and the rents are not high enough to make development viable, therefore they will need enabling development. Oxford Road: Site used as car park at the moment. Savills Design and Development Report 2007 notes car park reportedly very busy since ROK closed the St Pauls Square car park. Owners have held site for 20 plus years, unable to find a pre-let and cannot risk building speculatively at £17.5 / sq ft. Savills also report even at this rent they could only build to a low spec. If the site or part of the site could be used for housing then this may be of interest, but if the Council sought a high level of affordable housing then the site may not compare favourably to current uses/consent. Worth noting nearby site on Holdenhurst Road now under construction and will house the University's new Business School and student accommodation (Keystone).
Suggested Intervention	**Planning brief, allow a mix of uses and create viability to deliver office accommodation** which would not otherwise come forward due to market constraints. National policy guidance supports town centre mixed use development. **Confirmation of land ownership** should be sought to establish if private or publicly owned and establish owner's intentions. If publicly owned then as noted below can be transferred to the Regeneration Company. Further consideration will also be required regarding the implications of the loss of the car park on the area parking strategy. We are also aware of the potential forthcoming Bournemouth Regeneration Company and the Council's Cabinet Decision (20th February 2008) acknowledges that a number of Council assets including car parks could be transferred to the Company. We would recommend that the Landsdowne area is a **key project for the Bournemouth Regeneration Company** in line with one the Company objectives which is to secure higher value employment in the town. Lansdowne is believed to be on the agenda for the Regeneration Company following consideration of the town centre sites. However, we understand that the Company will at least initially focus on Council owned land, therefore the recommendation for their involvement with privately owned elements of this site may not be suitable in the short to medium term.

Images	 
SITE NAME	LANSDOWNE, AREA A, ST PAULS
Site Area	Total: 2.67 / Available: 0.8ha
Allocation	Falls within Lansdowne Offices Area for B1 development within the Bournemouth Local Plan.
History	Planning Permission for 180 flats, 103,353 sq ft office space in two buildings. Retail use on GF of residential accommodation. 289 parking spaces which 151 for office building. Good level of interest in the residential part. Sec 106 requires the majority of the office accommodation to come on line before the residential. Attempted to do a pre-let to Barclays Bank.
Strategic Access	Very good. Public transport access very good. Close to Bournemouth Station and the Travel interchange located just off the A35.
Site Access	Good.
Internal Environment	The site has been cleared and boarded up ready for construction.
External Constraints	The site is adjacent to the A35 with fairly high traffic levels.
External Quality of Environment	The site adjoins office development to the east and high density residential development to the south of approximately 10 storeys. The A35 and St Pauls Road border the site to the north and west.
Access to Facilities	Excellent town centre location.
Other Comments	The developers claim that there is not the demand for offices in the location and the rents are not high enough to make developments viable, therefore they will need enabling development. It's a prominent site with a good frontage to the main road. The site has planning permission for offices and flats as enabling development, but split is about 50:50 and there is a condition that the office has to be built before the residential development. However as the scheme is expected to be 16 floors this will still deliver a high level of office floorspace. The Savills Design and Development Report (2007) for the Lansdowne area makes a number of recommendations for the St Pauls area and proposes a land use strategy for the site comprising a significant office block with residential and multi storey parking behind. We are also aware of the Rokscar scheme for 100,000 sq.ft. of office accommodation on St Paul's Square which according to agents on the scheme

	has been shelved despite market interest (further details are provided within the property market section of the main report). The Council report that a planning application for a mixed development for offices and a new hotel is hoped for/expected after the sale of the site by Rok to McAleer and Rushe. We understand McAleer and Rushe have exchanged contracts and are due to complete in December. There is currently a hotel operator interested as an alternative to the residential part of the mixed used development which allows the opportunity to build out the office uses as part of a mixed scheme. The site is an area of search for the Enterprise Centre proposed by the RDA (together with other sites). A mixed use office / hotel would be a good outcome for the site which would fit with the Council's objectives.
Suggested Intervention	We are aware of the potential forthcoming Bournemouth Regeneration Company and the Council's Cabinet Decision (20th February 2008) acknowledges that a number of Council assets including car parks could be transferred to the Company. We would recommend that the Landsdowne area is a **key project for the Bournemouth Regeneration Company** in line with one of the Company objectives which is to secure higher value employment in the town. Lansdowne is believed to be on the agenda for the Regeneration Company following consideration of the town centre sites. However the requirement for intervention on this site may be lessened if the site is sold to McClear and Rushe.
Images	 
CHRISTCHURCH	
SITE NAME	CHRISTCHURCH BAE SITE
Size	Total: 8 ha / Available: 4ha
Allocation	Not formally identified within past 10 years although considered in ELR.
Site History	None apparent although discussions underway between CBC and site owner (see below 'other comments').
Strategic Access	Very good, just off the A337 and close to A35 with good access.
Site Access	Immediate site access good with existing commercial entrance from Grange Road. Bus stop opposite site.

Internal Environment	Site level appears to be unconstrained and parts of the site cleared ready for development. The previous site uses will need to be further investigated to establish likely site contamination issues (concern if previously used by BAE for manufacturing).
External Constraints	Existing residential development to the rear of the site and opposite front of site. However due to adjoining employment uses and landscaping in front of the site there is considered to be sufficient distance between potential uses and existing residential to overcome amenity considerations.
External Quality of Environment	Very good, high quality employment environment with existing large scale employment uses sandwiching the site and good road frontage.
Access to Facilities	Reasonable distance from town centre and residential population and in relatively close proximity to supermarket.
Other Comments	We are informed site has been purchased by developers Terrace Hill, on site marketing board indicates marketing for industrial and warehouse units between 185 sq m up to 6,970 sq m under the branding of ‘Christchurch Business Centre’. The Council has engaged in pre-application discussions with the owners, however the owners plans for mixed use development with supermarket, care home etc do not comply with the Council’s policy or aspirations. We perceive this as an ideal employment location.
Suggested Intervention	There are no obvious constraints to the development of this site as an employment site other than the landowner’s ambitions for a mixed use scheme. Our recommendation is to have **clear strong policy for the protection of the site for employment uses** as it is one of the few available within the district away from the airport possibly underpinned by a **development brief** setting out the requirements for the site and how they could be met. As part of the development brief **site investigations** (contamination) could be undertaken. We understand pre-application meetings have already taken place between the owner and Council where aspirations from the landowner have focused on a mix of uses outside of the B use classes. We understand the Council have indicated to the landowner that the site should be retained for employment uses. In this light, whilst rigidly protecting the site for B use classes only, the development brief should however **allow flexibility within B use class employment uses to avoid stifling the market.**.
Images	 

SITE NAME	AVIATION PARK WEST AND EAST
Size	The site forms the Northern Development Zone which comprises 80ha in total and is split into Aviation Park East and Aviation Park West. The gross undeveloped area remaining for the whole of the NDZ is 67ha with a net developable area of 59ha.
Allocation	The site is allocated within the Christchurch Local Plan as part of the Northern Development Zone which proposes 80 ha of land for employment within B1, B2 and B8 uses. We understand that planning for the airport is likely to be set out in the Core Strategy and accompanying Supplementary Planning Document (not a separate Airport Area Action Plan as previously thought) which will be informed by the masterplanning work undertaken by the site owners.
Site History	The site is likely to contain significant planning history for a variety of commercial uses. We understand there is a clawback issue related to the original sale of this land by Bournemouth Borough Council which Manchester Airport Group feel is an issue going forward.
Strategic Access	The Airport itself is located close to the A31 and the A35 but there are issues with capacity at the junctions to these roads. Improvements to a number of junctions on the local B road network are necessary to improve capacity to support development over the medium term. The scale and nature of improvements, together with the level of development improvements can support and their triggers for provision, is being investigated through an emerging study being carried out by Peter Brett Associates. The major issues relate to the capacity of the B3073 and the A338 and infrastructure improvements required to accommodate airport growth along these roads. The junction issues along the B3073 are Parley Cross, Chapel Gate, Hurn Roundabout and Blackwater Junction. The Peter Bretts Study sets out a detailed package of improvements. The initial findings of the Peter Bretts Study are discussed further below.
Site Access	The site access to Aviation Park East is very poor with a single track lane over a bridge. Public transport links are extremely limited. The immediate access into Aviation Park West is good (and significantly better than Aviation Park East).
Internal Environment	<u>Aviation Park East:</u> A sprawled out industrial site in an extremely poor condition with the exception of the FRA site and the Crew Training Centre facility to the rear of the site. Large parts of the site are constrained by trees and vegetation. <u>Aviation Park West</u>: Good quality business-park-like development at the entrance of the site. The remainder of the site is much more varied between fairly new office development and more hangar-like development and other industrial sites. The quality of the internal environment drops the further one gets away from the entrance. Far end of site dominated by aircraft scrap yard.
External Constraints	Strategic access is the main constraint. The report on Future Role of Land at Bournemouth Airport (March 2008) by Nathaniel Lichfield & Partners identifies road access as the key constraint to development although the various ecological constraints are also highlighted.

	The access to Aviation Park East is dependent on the Hurn Bridge roundabout which has significant capacity constraints. However, improvements to Hurn roundabout are to be provided by Dorset County Council funded by a contribution from the terminal planning permission. We are also aware that the updated Environment Agency flood risk maps identify most of the Northern Development Zone within flood risk zone 3 and predicted zone 3B when factoring in climate change. The Council has commissioned Halcrow to conduct a Level 2 Strategic Flood Risk Assessment which will identify flood depths and whether this can be effectively mitigated. We are informed that the outputs of the SFRA level 2 will be available in January 09. There is also an allocation within the Dorset Waste Local Plan for a Mechanical Biological Treatment Plant (5.6 ha) near the entrance to Aviation Park West. The plant is expected to generate 190 HGV and 50 car movements daily. The Nathaniel Lichfield report highlights concerns that the plant will provide an unattractive setting for some office occupiers which may constrain the type and quality of development that can be developed on this part of the site.
External Quality of Environment	The sites are surrounded by environmentally protected areas and airport related development restrictions.
Access to Facilities	<u>Aviation Park East</u>: The site is remote from facilities with the nearest village of Hurn offering very little. <u>Aviation Park West</u>: There seems to be a restaurant café on the industrial park but no further facilities within walking distance of the site. However it is worth noting the recommendations of the Nathanial Lichfield Report (para. 9.18) which identify the early provision of service uses on site as an important feature of developing the business park further. These could include for example convenience retail, restaurant, banking, amenity space, conference and leisure facilities and even dental ,medical and legal services (although these maybe usual for larger parks).
Other Comments	<u>Aviation Park East:</u> seems to be very constrained and further development of the area seems to be unlikely in the near to mid-term future. The key concern is the immediate site access and the strategic site access. <u>Aviation Park West:</u> Large parts of the site would have to be completely re-planned and re-developed. The release of land is discussed within the intervention section below.
Suggested Intervention	<u>Due to the on and off site environmental and access constraints explained above it is clear that development at Aviation Park East is unlikely to come forward at the moment, therefore we focus below on bringing forward land at Aviation Park West.</u> The Nathanial Lichfield report identifies a number of road infrastructure improvement options which would assist in delivering additional capacity for development. The development of a new link road has raised significant concerns regarding ecological impacts. We understand Land Use Consultants are nearing

	completion of the airport ecological study (October 08 completion) which assesses the impact of infrastructure options to facilitate the growth of the operational airport and the business park. One of the considerations of the work is to assess if there is an ecologically acceptable alignment for a link road from the north east business park to the A338 that passes the HRA. **Once the findings are known these will need to costed up and considered alongside the recommendations of the Peter Brett's study**. The Nathanial Lichfield report considers a number of funding options for the proposed road infrastructure and finds that no apparent sources exist in the short to medium term including funding from SWRDA or the Regional Infrastructure Fund. However, the report highlights the potential of the Regional Funding Allocation post 2016 where the link road is highlighted as a potential scheme. In terms of **strategy for bringing forward the development** of employment land at the Airport, the Nathanial Lichfield Study concludes the following options: • seek to increase the funding priority for the link road to enable development to proceed more quickly; • identify capacity to accommodate further development of the existing road network and small scale improvements to it which will indicate what level / type of employment can take place now, and with different levels of road improvements at what level of development the A338 link road will be needed (NB: £1m earmarked for improvements to Hurn Roundabout and by-pass); • until capacity of existing/improved network is clear strictly limit the scale of new development and restrict to low traffic generating uses that can be accommodated by improvements to the B3073 (they confirm this is likely to involve very low level of new development on west side of site); • once capacity of existing / improved road network identified, consider agreeing in principle masterplan and mix of uses for remainder of site with a level of development that can be accommodated by such infrastructure; however the implementation and phasing of the development would be carefully linked to, and conditional on, the timing of delivery of necessary highway infrastructure; • in the short term, prior to any certainty on delivery of the link road, this would mean permitting new development of a scale and type that can be accommodated just by improvements to the B3073, with developer Section 106 contributions made towards this. The link road to the airport should be considered by the respective local authorities as a potential candidate for CIL funding if they chose to introduce the CIL. The CIL would be an adequate additional funding source as it is designed to ease funding of infrastructure on a sub-regional level. The identification of the link road as an important infrastructure investment in the RSS would support this approach. However in the meantime a further potential funding opportunity to explore is the implementation of the interim transport contributions framework for SE Dorset which provides an interim policy in advance of Core Strategy CIL policies. We understand that Dorset County Council (Highways) are currently in the process of scrutinising the findings of the Peter Brett Associates Transport study and this process may take a few weeks. The Peter Bretts study has explored the highway impact of the development that the airport themselves

	wish to see come forward. We understand that Christchurch BC are seeking further work by Peter Bretts to determine the precise level of development that can come forward subject to a deliverable infrastructure package and the habitats regulations assessment as currently the study does not assess the upper limits of the quantum of development that can come forward. This work will then inform the LDF process. Therefore, at this stage we have identified 15ha as required to come forward at the airport on Aviation Park West following conversations with Dorset County Highways Officers (prior to the release of the Peter Brett Study) who confirmed that 10 to 20 ha of employment development could come forward on the western side of the Airport in the short to medium term before the new link road would be required, although any expansion would still require local road improvements. However to reach this point **investment is required in major services including electricity and drainage upon which further work is needed**. In addition to the infrastructure related strategy set out above the Nathanial Lichfield report also recommends **careful and active marketing** of the site to raise awareness and promote further interest, by attracting a suitable, large, high profile tenant at an early stage, possibly through offering preferential terms. However this can only happen if such as site can actually be delivered on the ground. Further recommendations within the Nathanial Lichfield study include a **brand led marketing campaign** to differentiate the site from alternative locations; **developing linkages with higher education institutions**; and **early provision of attractive amenities / services** for occupiers staff to off set the remote out of centre perception of the site. These aspects all need to be considered within the masterplan. The **Local Development Framework Core Strategy and Airport SPD will provide a policy framework with the SPD expected to consider finer detail such as the phasing of development and potential master planning**. Through the Core Strategy the Council are also preparing an infrastructure schedule for implementation over the plan period which will link into the new Community Infrastructure Levy. The Council has also been involved in the preparation of the South East Dorset Interim Transport Contributions Framework which once adopted will ensure a significantly higher level of contributions to support the delivery of necessary transport improvements. An issue which needs to be overcome is the identification of the majority of the Northern Development Zone as being subject to flood risk (level 3). The Council have therefore commissioned a level 2 assessment which will define the exact level of risk and provide appropriate mitigation measures. In addition to the outlined Council interventions above, Manchester Airports Group are also undertaking a number of studies to assist in delivery of additional employment space. As noted above, they have prepared a feasibility study (2003) and masterplan (2007) with additional work underway to develop the planning framework which will feed into the Council's LDF process. As noted above, Manchester Airports Group have also commissioned Peter Brett Associates to undertake a transport assessment to provide triggers for infrastructure and costing of infrastructure to support growth. A Travel Plan Coordinator has been appointed which will assist in the overall package of transport measures. The County Council has also investigating link road options from the North East Business Park to the A338, as well as potential bidding

	options for strategic transport improvements. The **implications of the Peter Brett Associates report for phasing of development will also need to be considered**. However the Council are keen to ensure that the phasing of development must consider the quantum of land that can come forward as identified in the Peter Bretts Study against the ideal phasing of development set out in the NLP report. The findings of the Nathanial Lichfield and Land Use Consultants studies need to be further considered although we suggest masterplan concepts are developed in tandem with capacity analysis. Further capacity analysis is required to support a deliverable infrastructure plan prepare as part of the LDF process. The development viability implications of a revised obligations policy will also need to be fully assessed. In summary, significant concern remains regarding securing sufficient funds to deliver necessary infrastructure improvements. The Council believes that, despite the RSS recommendations that the infrastructure requirements are a commercial concern, the **status of the airport needs to be raised in the RSS in order to obtain regional/national level funding**. Presently however within the RSS Proposed Modifications the Airport has been downgraded from Regional to Local Status in employment terms. Whilst the RSS is not formally adopted yet it is unlikely that it will be amended at this late stage, therefore raising of the Airport's profile may have to be done through the RSS monitoring and review process. The Council also wish to see the Airport feature within the action plans of the Multi Area Agreement which they believe would help facilitate additional funding. Further suggestions from CBC include the provision of subsidies for businesses to locate to the Airport.
Images	 
E DORSET	
SITE NAME	FERNDOWN INDUSTRIAL ESTATE – EAST OF COBHAM ROAD
Area	Total: 8.5 ha / Available: 8.5 ha
Allocation	Allocated within East Dorset Local Plan for B1/B2 and B8 development.
History	Application submitted for employment development following years of

	disagreement between landowners. However the application was recently subject to holding direction from Highways Agency in light of impact on A31 (see below). We understand however that the hold direction has now been lifted and the application was approved by East Dorset (October 2008 committee) subject to the completion of a Section 106 Agreement.
Strategic Access	Strategic access is very good, just off the A31. However there are issues with the access onto the A31 and the Highways Agency has raised concerns with additional development impacting on the section of the A31 which runs past the Industrial Estate and is not dualled. As noted above we understand that a financial contribution has been agreed with the Highways Agency and their Direction has been removed
Site Access	Good, off the existing industrial estate road although immediately opposite another estate road junction which may require further consideration. Also proposal for Ferndown Relief Road within Local Plan to rear of site although East Dorset confirms allocation has fallen foul of SSSI regulations.
Internal Environment	Reasonably flat piece of land, currently in agricultural use. Some mature trees on or surrounding the site and landscape buffer zone proposed in centre of site and along site's southern and eastern boundaries.
External Constraints	Highways Agency's concerns as mentioned above although solution now agreed. Mature trees alongside the northern edge of part of the site. Residential uses to the southern far end of some of the site. Local Plan also proposes open space / recreation to rear of site. We understand levelling work and balancing reservoirs are also required to facilitate development.
External Quality of Environment	Very good with logical extension of the existing industrial estate which is the biggest estate in Dorset. The estate has 40 hectares, 5,000 employees and 375 businesses.
Access to Facilities	There are a number of facilities for employees due to the scale of the industrial estate which is also not that far away from the centre of Ferndown.
Other Comments	According to the Council there is high demand for business space from the local businesses and the existing estate displays a high level of occupancy. Site being marketed as Cobham Gate Business Park (25 acres) with Phase 1 proposing 20,000 – 150,000 sq.ft. units for B1, B2, B8 freehold and leasehold design and build options.
Suggested Intervention	**An agreement with the Highways Agency is now in place. Resolution of the Section 106 Agreement therefore needs to be agreed as a matter of urgency to bring this site to the market.** Potential recent stalling in negotiations maybe attributed to the Agency awaiting the findings of the South East Dorset Transport study, we understand findings have now been published. However, even if the study recommendations propose alterations to the A31 corridor at Ferndown then these will not be delivered on the ground for significant time so a **short term highway solution is required**. The Council have informed us that the requirements of the Section 106 Heads of Terms will still make the development viable. We understand that the terms include the provision of physical off site infrastructure measures and we would therefore recommend if possible that the period of implemention for the planning consent takes this into account (particularly in light of the current market). **We would therefore recommend that the development implementation period is extended on an issued decision notice to be in excess of the standard 3 year period.**

	We have assumed that the level of contributions to infrastructure has been agreed by the developer, however should discussions still be underway we would recommend that contributions could be calculated on a floorspace basis and only made on occupation of each building. The level of contributions however will need to be set at a rate which will make the development viable and not force the developer to market land / buildings at unfavourable market levels. If still necessary an **independent appraisal could establish reasonable levels of contribution to the A31 improvements**. In conjunction with the payments a **workable travel plan with targets and penalties** should be put in place which will commit future occupiers to reducing the need to travel by private car. The **level of highways contributions will also need to be balanced up against other significant development costs** as we understand levelling work and balancing reservoirs are also required to facilitate development.
Images	 
SITE NAME	DRAFT RSS AREA OF SEARCH Q, NORTH WEST OF FERNDOWN.
Area	20 ha
Allocation	Not allocated within East Dorset Local Plan but falls within wider Green Belt designation and falls within Draft 2006 RSS 'area of search Q'.
History	Assumed no planning history to date, East Dorset DC reports that the land is being promoted by owner (Forestry Commission) as an employment area of search for B1/B2/B8. A previous proposal for Mechanical Biological Treatment Plant was rejected by the Waste Local Plan Inspector.
Strategic Access	Strategic access is very good, just of the A31. However there are existing issues with the capacity of the A31 which is single lane along the stretch adjoining the site's northern boundary, as a result the Highways Agency has been holding up the undetermined employment application east of Cobham Road within the industrial estate as explained above.
Site Access	Currently not clear. Site access might be an issue particularly if a new junction from the A31 is required.
Internal Environment	Reasonably flat piece of land. Parts of site have heath land characteristics and significant woodland on the site comprising mature trees. Majority of site appears to be used for grazing purposes. Potentially significant environmental constraints.

External Constraints	There are some environmental external constraints and known highway constraints.
External Quality of Environment	It will be a logical extension of the existing industrial estate and the A31 provides a natural barrier to further development although potentially high ecological value.
Access to Facilities	There are facilities on the existing estate and the site is not too far away from Ferndown town centre.
Other Comments	The RSS Proposed Modifications have relocated 20 ha of employment land from the Area of Search Q to the Area of Search 7G, East of Ferndown. However we understand that this is a printing error and the Area of Search remains to the north west of Ferndown. East Dorset have supported the site for assessment in light of the 'Areas of Search' within the draft RSS, however these are far from defined and other sites may also fall within the area for consideration. For example we are also aware of land being promoted to the south of the access roundabout for the Industrial Estate (where the relief road was proposed) whose agents believe that their 4 ha site can offer an alternative site to the Area of Search or can supplement it offering the market a choice of sites and eventually a choice of units. They also believe that in terms of green belt impact this land is far less sensitive than the Area of Search.
Suggested Intervention	In essence the scheme needs to go through the planning process in order to become a future allocation which is likely to take more than 5 years with access from the A31 the key concern. **A full masterplan approach will be required and recognition through the LDF process possibly through an SPD Delivery Plan and as a strategic site within the Core Strategy**. The development of this land for employment will need to be **linked where possible to funding opportunities for the required infrastructure especially improvements to the A31. One opportunity maybe the CIL whereby the development currently proposed south and east of Ferndown subsidises the strategic infrastructure required to serve the employment land.** However another **more likely option will be the SE Dorset Transport package which will result in a contribution by sq.m. basis**. The findings of the SE Dorset Multi Modal Transport Study will further inform this, particularly with regards to the level of contributions required for the A31. **A long term capacity solution with the Highways Agency** will need to be agreed as a priority to ensure that improvements to the A31 are in place when the development comes forward. Further **concerns regarding environmental risks will need to be explored** as a matter of priority to determine the net developable area and whether additional sites are required to deliver the required growth.

Images	 
NORTH DORSET	
SITE NAME	THE BREWERY BLANDFORD
Size	Total Size: 8.2 ha / Available: 6 ha
Allocation	Existing employment site B1, B2 and B8.
Planning History	Approved planning application for mixed use development on the brewery site.
Strategic Access	Although Blandford Forum is not on the main east-west road system (A31/A31) it is well located within Dorset. The town is on the A35/A354 connecting Salisbury with Dorchester and the A350 from Poole to Shaftesbury.
Site Access	Site access to the Brewery and the site behind the superstore is satisfactory.
Internal Environment	The current use on the site includes a brewery, with an old brick building and a more recent bottling facility in a modern big grey shed, a retail area (Tesco and Homebase) and a small business park behind Tesco which includes a vacant piece of land.
External Constraints	The whole site is in a conservation area with river frontage. There might be capacity issues on the immediate road access to the brewery site. The EIA estimates that there will be an traffic increase on the Bournemouth Road of 12% as a result of the redevelopment of the brewery site. However the Road is thought to have the necessary capacity.
External Quality of Environment	High quality edge of town setting.
Access to Facilities	We consider access to facilities as being very good with a superstore nearby and being very close to the town centre.
Other Comments	The owners of the site (Hall & Woodhouse) submitted a planning application for a mixed use development in December 2006 which has subsequently been approved by the local planning authority. The planning application seeks to redevelop its site to replace the old brewery with a modern and more economic and efficient brewery, as well as encouraging a vibrant mixed use community with new homes, and employment opportunities. The Masterplan proposes the location of the new brewery facilities on the eastern half of the site to ensure

	that the operations of brewing process is continuous and the good links to the road network are maintained. Apart from the proposed offices for Hall & Woodhouse, the southwest part of the site is primarily promoted for residential use, including the conversion of the existing principal brewery building to residential use. Planning permission is to be granted once the Section 106 agreement has been finalised.
Suggested Intervention	*Vacant Site next to Business Part / behind Tesco* The vacant land behind Tesco would be a natural expansion of the existing business park which is of high standard and fully occupied. We suggest that this **vacant site behind Tesco should be kept in employment use** as an extension of the existing business park and be protected for such a use by planning policy. **A development brief** would help to increase policy and market certainty. *Brewery Site* The site is in single ownership and has an approved planning application. The development of the site is therefore in the hands of the owner. Bringing the development forward might require **pro-active engagement by the Council** to support the owners in bringing this large project forward. As part of a range of rural sites co-ordinated by Dorset CC, this might include support with securing a development partner (if required) and resolving reserved matters / outstanding planning matters.
Images	 
SITE NAME	STURMINSTER, NORTH DORSET BUSINESS PARK, E47
Size	Total: 7.2 / Available: 4.4 ha
Allocation	Described within local plan as 'Existing Developed Employment Areas within Settlement Boundaries'.
Planning History	Granted outline planning permission, in advance of Local Plan preparation in 1989 (Applic. 88/1041(54))
Strategic Access	Strategic access to Sturminster is poor, with the town being located off the main road system.
Site Access	Site access is good just off the main road (A357).

Internal Environment	The developed area of the site is comprised of relatively modern business units (B2). The remainder of the site is vacant land, however there maybe constraints from trees and other environmental issues (e.g. wildlife).
External Constraints	Flood risk issues on the western side of the site and open and wooded areas allocation around the site. Land zoned as Area A in the development brief will be restricted to use class B1 or B8 with conditions restricting working hours. The use of machinery and incorporation of noise insulation and landscaping.
External Quality of Environment	Rural setting.
Access to Facilities	Relatively poor as the site feels detached from the built up area.
Other Comments	The first part of the business park only came forward because South West RDA was prepared to develop the site with a major tenant (Olive Et Al) lined up. Rate relief was offered to try and bring the remaining part of the site forward via an economic development grant but was unsuccessful. There is potential to use public sector land holdings (SWRDA, DCC and NDDC) to help catalyse development. Discussions are continuing on this option and the potential to market the site in the future. Previous negotiations with Glenmore were halted based on the envisaged low commercial returns and costs of meeting the BREEAM standard for the site to achieve corporate objectives for sustainable economic growth. Through the Dorset Food Mill Project there are aspirations for food business park / food hub. The site is appropriate to serve a local commercial market however the competition from Poundbury (such as Dorset Cereals and the chocolate manufacturer) which is also developing a food niche will need to be carefully considered.
Suggested Intervention	There is a significant increase in housing proposed at Sturminster Newton and it is possible that employment sites in the area may become more favourable and attract some investment. The site is fairly disconnected from the town centre. **Strengthening the access links from the site to the town centre** might help increase the attractiveness of the location through formation of footpaths and further incorporating bus routes and cycle routes. North Dorset Business Park is located in a rural area. **Identifying economic activities that are strongly linked to the country** side and developing a 'cluster' of such activities at the Business Park might help to bring the second phase of the Business Park forward. We understand that SWRDA considers supporting the development of a 'food cluster' at the business park. With Olives Et Al already on the site and a growing market for authentic, locally grown and processed food this might be a promising approach. Rural Dorset seems a good location for such an approach (as the very successful Dorset Cereals brand illustrates). We would also recommend the **preparation of development guidelines** for the site including supporting the food cluster concept. Further investigation into

	the **formation of a Local Trust** should also be undertaken to assist in promoting the food cluster concept. Within the site itself the relocation of the Dorset CC depot from the front of the site to the rear should also be supported to assist with developing the food mill concept and supporting uses on the adjoining land on the front of the site. Whilst we understand the RDA are not considering the purchase of any additional land we would recommend **consideration of land swap deals** in partnership with North Dorset DC / Dorset CC to assist in enhancing the site environment and bringing plots to the market.
Images	 
SITE NAME	LAND SOUTH OF A30, POLICY E374
Size	Total: 6.2 ha / Available: 6.2 ha
Allocation	Described within the Local Plan as 'Proposed New Employment Allocations'. Approximately 7 hectares of land to the south of the A30 will be developed for business, industrial and warehousing purposes subject to: (i) Provision of a vehicular access from a signal controlled junction on the A30 (see policy SB9). (ii) Provision of a bus stop with shelter. (iii) Extensive landscaping on the western and southern boundaries of the site. (iv) Mixed use development on the frontage to the A30 may include commercial uses with flats over.
Planning History	It is stated in the ELR MAA that there is no valid permission for employment or any other use on the site. An outline planning application for B1, B2 and B8 uses all with associated infrastructure and landscaping and vehicular access was submitted in September 2006 by Persimmon Homes. The application has yet to be determined.
Strategic Access	Strategic access is fairly good as the site is located on the A30 just outside Shaftesbury.
Site Access	Site access is currently not clear. The Local Plan requires provision of a vehicular access from a signal controlled junction on the A30 and the provision of a bus stop with shelter.
Internal Environment	Land currently used as agricultural land. Large hedgerows through the middle of the site. The Local Plan requires extensive landscaping on the western and

	southern boundaries of the sites. Part of the site within ground water protection area like the rest of Shaftesbury. There is a former landfill on parts of the site. Parts of the sites are used by travellers. The site is in multiple ownership.
External Constraints	There are no obvious external constraints.
External Quality of Environment	The development of the site would be an expansion of Shaftesbury. However, there is a piece of unallocated open land between the settlement boundary and the employment allocation.
Access to Facilities	Currently access to facilities is not very good. However proposed commercial unit along the A30 might offer some facilities.
Other Comments	There is an urban residential expansion of Shaftesbury to the north of the A30. The employment allocation to the south of the A30 would complement the residential development to the north.
Suggested Intervention	Issues that need to be resolved for the site to come forward are the remediation of the former landfill on parts of the site, the relocation of the travellers and land ownership issues. This is a site with significant employment potential next to an urban residential expansion of Shaftesbury. However, the site faces multiple constraints to development including **the relocation of the travellers, the remediation and the land ownership issues**. **Sharing infrastructure costs (e.g. for the signal controlled junction) with the residential development to the north of the A30** should be considered. The allocation of approximately 6 ha at this location raises the question if the market will deliver this amount of employment land. A **phased and possibly more consolidated approach**, which might require less extensive landscaping, might help the site to come forward. This could be set out in a **planning brief** should assist in allowing planning certainty to the market whilst at the same time providing flexibility to ensure that the employment market is not stifled through excessive prescripted conditions. In light of the current residential market downturn **further consideration is required regarding the deliverability of the employment elements without the Persimmon residential elements coming forward** in the short to medium term and the interlinking of both elements. The expected cross subsidy of the employment by the residential elements to deliver required infrastructure maybe better explored (in the short to medium term) through the Regional Infrastructure Fund to forward fund the required access works.
Images	 

SITE NAME	BRICKFIELD BUSINESS PARK, GILLINGHAM, E152
Size	Total: 29.8 ha / Available: 11.7 ha
Allocation	Described within Local Plan as 'Existing Developed Employment Areas within Settlement Boundaries'.
Planning History	The ELR market attractiveness assessment indicates that there is no valid permission for employment development on this site, or for any other use. An outline planning permission for industrial purposes was granted (but never implemented) in May 2000.
Strategic Access	Strategic access to the site is relatively good, with the A30 to the south and the A303 to the north.
Site Access	Site access is relatively good, currently used by the occupiers of the existing large industrial estate. There might be a need for an additional site access from the south off the B3092 as part of a large scale extension of the business park.
Internal Environment	The available land is south of the existing business park and the chemical plant Sigma Aldridge. It is a greenfield site sloping towards the river. There is a scheduled ancient monument site and a sewerage consultation area within the available land. There is a hedge going through the site and there are some mature trees.
External Constraints	We understand that the chemical plant limits the type of neighbouring uses. It's only the south eastern corner of the site that is actually not constrained through either scheduled monument or the chemical plant. The south eastern part is the area which has potentially good site access directly off the B3092.
External Quality of Environment	Extending the business park to the south would provide a natural extension of the existing business park. There might be ecological, landscape and archaeological issues. There is also a public footpath running through the site.
Access to Facilities	The business park is set apart from the town centre, however there are number of limited facilities for employees on the business park due to its scale.
Other Comments	The existing business park appears to be well occupied with some major anchor tenants (i.e. Sigma Aldrich and Dextra Lighting)
Suggested Intervention	Large parts of the available vacant land seem to be constrained by use restrictions or environmental issues. However, the south eastern part of the site is less constrained and has potential good site access directly off the B3092. Focus could be given to developing this part of the site. The ownership since the 2000 planning application is likely to have changed (with the former owner having passed away and his wife retired from business). The site would be a natural extension of the existing business park and in a first instance a **pro-active dialog with the owners** should be considered. A **planning brief**, setting out the constraints and the necessary mitigation measures, would help to increase planning and market certainty. **Discussions**

	with tenants on the existing business park regarding premises requirements might identify some market demand.
Images	 
POOLE	
SITE NAME	KERRY FOODS SITE – STERTE AVENUE WEST
Area	Total: 5.7 ha / Available: 5.6 ha
Allocation	Allocated within Poole Borough Local Plan under Policy E1 for employment purposes. 0.47 ha parcel identified within ELR as 'high quality non allocated employment site to be retained for employment use' and being allocated in Site Specific Allocations DPD Preferred Options document.
History	Poole BC has confirmed no planning history apparent, however main site thought to be reserved for expansion by Kerry Foods.
Strategic Access	Very good, just off the A35 and the A350.
Site Access	Site access doesn't seem to be an issue.
Internal Environment	Fairly flat piece of land. Likely to be flood risk issues, at least on parts of the site and therefore site will require raising levels to meet flood risk concerns. We also understand there are potential significant costs from remediation of drainage and ground conditions.
External Constraints	No external constraints. Neighbouring uses all industrial.
External Quality of Environment	Industrial estate in good quality.
Access to Facilities	No immediate access to facilities but not too far away from Poole town centre being in a fairly central location.
Other Comments	There might be drainage issues on the site which could have an impact on viability. There is also a small plot to the south of the site which appears to be unconstrained and readily accessible.
Suggested Intervention	**Retain strong employment protection policies** for site as valuable asset for Poole, either through expansion of Kerry Foods or in large unconstrained vacant plot if surplus to their requirements. **Maintain communication with**

	Kerry Foods to secure commitment regarding future of the site.
Images	 
SITE NAME	SOPERS LANE, POOLE
Area	Former Poole Pottery / Siemens site, 4.5ha in area, forms part of a wider area of approximately 13.5 ha to be included in a master planning approach to guide development proposed in the Core Strategy. A former Barclays data centre occupying 5.3ha of the 13.5ha site lies to the east of the Pottery / Siemens facility. An additional parcel of land (0.77ha including 1,315sq.m. of B1 floorspace) within the southern boundary of the masterplanning area 13.5ha site has also recently come onto the market on a freehold basis for redevelopment or owner occupation.
Allocation	Allocated under Policy E2 for protected employment use within the Poole Local Plan. LDF Core Strategy (Submission May 08) proposes 4.5ha for B1/B2 – high tech / R&D – refer to 'Other Comments' section below.
History	The entire site was previously in sole occupation by Siemens Plessey, however a rationalisation in the 1990s led to much of the site being declared surplus to its needs which led to investment and relocation of Poole Pottery to the site, a new business park of small units and a budget hotel. 4.5 hectares has been identified as available in the short / medium term although further rationalisation could result in increased availability across the master plan area. Recent appeal dismissed for care home (Mental Health) on western end of the site on grounds of lack of marketing exercise and evidence to support loss of employment.
Strategic Access	Good, off the A350 and A35 and close to A31.
Site Access	Poole BC's Transportation Services has clarified the situation with regard to potential options for access arrangements and highlighted a requirement to resolve site access arrangements which may include intervention to deliver new access arrangements if agreement cannot by reached with the adjoining site owner. Siemens can most likely resolve their site access. Access to the former Barclays site is good. Pottery site access has potential implications for surrounding residential uses.
Internal Environment	There are three distinct parts to the site; the Pottery site on the western end, the Siemens site in the centre and the Barclays facility at the eastern end. The Pottery site comprises relatively dated industrial buildings. The Siemens site comprises a relatively modern office building with an undeveloped plot to the south. The Barclays site appears to comprise a purpose built data centre facility. A further 0.77ha plot with existing buildings (south of the Pottery but north of Broadstone Way) also appears to be vacant and up for sale.

External Constraints	There are power cables running over parts of the site with pylons within the site. There are residential uses to the north and west of the site.
External Quality of Environment	Generally good.
Access to Facilities	Nothing seems to be in the immediate vicinity of this site but there is a local food superstore. There is a bus service running along Sopers Lane. The centre of Poole is 2½ miles away.
Other Comments	Much of the 4.5ha site appears to be vacant, although the remaining industrial building is still being used by Siemens under a lease which expires in 2010. The western end of the site has been the subject of a recent planning appeal for a care home which was dismissed on the grounds of loss of employment land. Further investigation of the ground conditions of the vacant plot next to the Siemens office building will need to be undertaken due to differing ground levels. The Core Strategy Policy PCS1 proposes (Submission document May 2008) B1/B2 – high tech / R&D on 4.5ha at Sopers Lane (assumed to be the Pottery site). The Policy identifies the estimated minimum number of jobs to be created on the site using an employment density of 29sq.m/workspace resulting in 950 jobs (640 full time). Precise details of floorspace and site area will be a matter for the masterplan and Site Specific Allocations DPD. The Core Strategy identifies Sopers Lane as a principle location for economic investment and job growth proposing *'comprehensive rationalisation for new intensive employment uses, in particular advanced engineering, incubator units for new business start-ups, medical and health related business specialisms and as a centre of excellence'*. Policy PCS3 within the Core Strategy proposes that the Council will work in partnership with the SWRDA, site owners and relevant stakeholders to prepare a masterplan for the site alongside the LDF Site Specific Allocations DPD to ensure that the masterplans are given statutory policy weight. The masterplans are expected to include: • a vision for the site in terms of strategic economic role; • guiding principles in terms of design, layout, floorspace, mix of uses and plot sizes; • a travel plan framework; • a delivery plan framework which identifies key infrastructure, role of different partners, necessary funding streams and phasing requirements; • an energy and resources framework demonstrating BREEAM 'excellent', renewable energy generation sufficient to meet at least 20% of on-site predicted needs and sustainable construction practices. The Council has also flagged up the identified requirement from the PCT for sites within the conurbation for specialist health care facilities. Further clarification needs to be sought with regards to the future of the former Barclay's data centre site as the specialist nature of the building will restrict future occupiers. Redevelopment and demolition costs may also need to be considered, data centres are also heavily power dependent and the site appears to benefit from direct linkage to the grid.

	We are informed that Siemens wishes to build a facility on their vacant plot and relinquish the lease on the building they currently lease from the pottery.
Suggested Intervention	Whilst a **site wide masterplan and development brief** approach to the site maybe the most appropriate mechanism to delivering employment development, the mix of ownerships maybe problematic in the short to medium term. The site is also believed to have a very high book value so owners maybe holding out for higher end uses than employment. We also understand that Siemens need part of their site for their own expansion but to date costs have not justified constructing their new facility. The decision of Siemens is not expected in the short to medium term and will have an affect on the adjoining parts of the site. We understand that the Council have been approached by the site owners of the vacant land regarding the option of selling land to Siemens at reduced rates to justify the development of non employment uses of the remaining plots. However, the Council have maintained the view that this is not appropriate and we therefore recommend that they **retain strong employment protection policies** for site as valuable asset for Poole, either through expansion of Siemens or vacant plots if surplus to their requirements. Therefore **early and committed sign up by all parties to the masterplan approach** will be vital, and sold to the parties on the basis of allowing them to shape the appropriate mix of uses on the sites. **Initial scoping work for the masterplan would be useful giving details of the flexibility that could be achieved between different uses**. A regular steering group of the landowners facilitated by the Council may establish reasonably quickly if a coherent masterplan can be brought forward. We understand a residue of the Poole Pottery is owned by a Speculative Owner which further demonstrates the requirement to undertake scoping work first before developing a detailed masterplan which could be counterproductive. We note the site specific requirements relating to renewable energy (20% renewables) as set out in the Core Strategy. The Regional Economic Strategy also recognises the importance of renewables in the South West Economy and this is seen as a growth sector. However, there are commercial viability considerations which will need to be assessed, therefore the precise proportion of energy from on-site renewables will be a matter of detail to be considered as part of the master plan approach. A balance will need to be achieved to ensure that overly onerous requirements do not stifle development, whilst using the 'green' angle as a marketing tool. Economies of scale may allow for consideration of renewable sources from a wider geographical base than the site in isolation. For example, the investigation of renewable sources is often assisted when residential development is likely to come forward and development is of sufficient scale to support initiatives' such as community heating plants.

Images	 
SITE NAME	FLEETS CORNER, POOLE
Area	Total: 6.5 ha / Available: 6.5 ha (which includes 3.1 ha occupied by Hamworthy Engineering)
Allocation	Allocated under Policy E2 for protected employment use within the Poole Local Plan. Hamworthy Combustion (3.1 ha) identified within ELR as 'non allocated site to be retained for employment use' (ELR to be updated to comprise entire 6.5 ha site). LDF Core Strategy (Submission May 08) proposes Fleets Corner (6.5ha) for B1/B2 – high tech / R&D – refer to 'Other Comments' section below.
History	The site comprises Hamworthy Combustion and part of the Nuffield Industrial Estate but was formally exclusively used by Hamworthy. Recently a marine skills centre has been established on the site. Poole BC has confirmed that there is no significant recent planning history to report.
Strategic Access	Good with access to A350 and A35 and close to A31.
Site Access	Excellent, on junction with immediate access to A35 and A3049.
Internal Environment	Predominantly industrial estate with significant but largely dated office accommodation. Vacant offices on the site.
External Constraints	No obvious external constraints.
External Quality of Environment	Site bounded by main roads to south and west, otherwise industrial environment with exception of Toys R Us immediately to the south east of site.
Access to Facilities	Supermarket across the road and public transport access to town centre approximately 2 miles away.
Other Comments	The Core Strategy (Submission document May 2008) proposes 39,000 sq.m. of B1/B2 – high tech / R&D on 6.5ha at Fleets Corner using an employment density of 29sq.m/workspace resulting in 1,350 jobs (900 full time). The Core Strategy identifies Fleets Corner as a principle location for economic investment and job growth proposing *'comprehensive rationalisation for new intensive employment uses, in particular advanced engineering, marine related industries, training in specialist skills (including the marine sector), incubator units for new business start-ups, and business hotel with conference facilities'*. Policy PCS3 within the Core Strategy proposes that the Council will work in partnership with the SWRDA, site owners and relevant stakeholders to prepare a masterplan for the site alongside the LDF Site Specific Allocations DPD to

	ensure that the masterplans are given statutory policy weight. The masterplans are expected to include: • a vision for the site in terms of strategic economic role; • guiding principles in terms of design, layout, floorspace, mix of uses and plot sizes; • a travel plan framework; • a delivery plan framework which identifies key infrastructure, role of different partners, necessary funding streams and phasing requirements; • an energy and resources framework demonstrating BREEAM 'excellent', renewable energy generation sufficient to meet at least 20% of on-site predicted needs and sustainable construction practices. We understand that the site has been promoted for retail redevelopment by the site owners however Poole BC has resisted the interest to date. We also understand that a number of short term leases (including storage for Animal) have been granted on the site. The existing office space is also being marketed with flexible terms and with on site boards proposing rents from as low as £6 p.s.f.
Suggested Intervention	Whilst a **site wide masterplan and development brief approach** to the site maybe the most appropriate mechanism to delivering employment development, the mix of ownerships maybe problematic in the short to medium term. Therefore **early and committed sign up by all parties to the masterplan approach** will be vital, and sold to the parties on the basis of allowing them to shape the appropriate mix of uses on the sites. We note the site specific requirements relating to renewable energy (20% renewables) as set out in the Core Strategy. The Regional Economic Strategy also recognises the importance of renewables in the South West Economy and this is seen as a growth sector. However, there are commercial viability considerations which will need to be assessed, therefore the precise proportion of energy from on-site renewables will be a matter of detail to be considered as part of the master plan approach. A balance will need to be achieved to ensure that overly onerous requirements do not stifle development, whilst using the 'green' angle as a marketing tool. Economies of scale may allow for consideration of renewable sources from a wider geographical base than the site in isolation. For example, the investigation of renewable sources is often assisted when residential development is likely to come forward and development is of sufficient scale to support initiatives' such as community heating plants. Full **aspirations of Hamworthy Combustion also need to be established** although we are informed by Poole BC that discussions to date with the site owners have revealed draft redevelopment aspirations that contain elements that would be contrary to current planning policy. Costs associated with clearance of existing buildings on site could affect viability of redevelopment, although this could be phased over time. The Council have maintained the view that non employment uses are not appropriate and we therefore recommend that they **retain strong employment protection policies** for site as valuable asset for Poole. In considering redevelopment there would appear to be limited vacant space driving the case for re-development and it may well be that many of the existing businesses wish to remain on site. Any more valuable uses such as retail are

	likely to be contrary to planning policy requirements. **The masterplanning of the site will need to be based on viability assessment** which may mean a large proportion of the site remains as it is. The retention of Hamworthy Combustion within the area will be key to the local economy.
Images	 
PURBECK	
SITE NAME	HOLTON HEATH INDUSTRIAL ESTATE
Area	Total: 32.0 ha / Available: 10.4 ha in two plots
Allocation	Listed within Local Plan 'Final Edition' under Policy MN1 which seeks to retain overall industrial estate for employment uses. The entire Industrial Estate is also allocated under Policy SS10 which permits development provided that: • existing landscaping areas along Blackhill Road or Holton Road are retained, or where none exist, are provided to a width of at least 5 metres; • any new buildings are designed to a high standard, make an individual and positive contribution to the overall appearance of the trading park and are landscaped; • any new buildings are not visible above the tops of trees south east of Bournemouth / Weymouth railway in views from the AONB, Heritage Coast and Poole Harbour. • It does not exacerbate traffic conditions on the A351; • the development does not adversely affect the adjoining nature reserve or SSSI directly or indirectly.
History	One of the vacant plots previously used for storage of static caravans. Previous history of Local Plan allocation being thrown out in the area due to the residential content and the associated implications for adjoining protected heathlands. Remainder of industrial has developed in a piecemeal fashion since the 1960's following previous use as the Royal Naval Cordite Factory. Existing planning permission for a 4.5 ha site.
Strategic Access	Strategic access is not bad with the site being only about 2km away from the A35.
Site Access	Good site access via significant roundabout and wide entrance road leading to excellent estate roads once within site.

Internal Environment	The vacant plot in the eastern section of site (fronting Blackhill Road and Holton Road) comprises a level cleared site and amounts to 4.0 ha. The south eastern vacant plot appears to have higher environmental constraints but other than that is a flat, more or less cleared site as well. Both plots have immediate access to the estate roads. We are informed by the Council that evidence was provided at the North East Purbeck Local Plan Inquiry to the effect that the land allocated for employment use at Holton Heath is not contaminated.
External Constraints	Vacant plots surrounded by protected heathland (SSSI, Ramsar and Special Areas for Conservation) and existing industrial estate. The Local Plan Policy SS12 does not permit any development at Holton Heath likely to exacerbate traffic conditions on the A351 in advance of the implementation, or agreement on the provision, finance and programming, of transport measures to reduce the volume and impact of traffic on the A351 (refer to intervention section below). The Local Plan indicates a restraint area to development covering the site resulting from sewerage works and other sources of unpleasant emissions to the south of the site, as well as a consultation zone from a hazardous installation.
External Quality of Environment	Very good with good quality industrial estate and natural buffers to development.
Access to Facilities	Appears limited although site is served by rail station with links to Poole.
Other Comments	The vacant plot within the east of the site has been marketed by Cowling and West for a significant period of time as a freehold industrial development opportunity for the 4.0 ha of land. We are informed however that the plot has recently been sold (June 08) in two parcels of 2.8 ha and 1.2 ha. The agents attribute the delay in sale of the land to apparent planning restrictions regarding a requirement for contributions towards highways infrastructure which would only be set once an application was submitted. The agents speculate that the indicative costs are likely to be between £0.25m - £1m but the site is now likely to come forward for B8 purposes by the new owner occupier. Purbeck inform us that access points to the railway line have to be kept open in some places, therefore no potential for continuous development along the railway line. We are also aware of British Land' s aspirations (as promoted through the RSS Examination in Public, Purbeck LDF and ELR) for their land holding either side of Blackhill Road (which serves as the access road to the estate) as an option to accommodate further employment development by way of an extension to the existing industrial estate. Within the ELR Stage 2 Purbeck identify the site as suitable for the sectors of advanced engineering and food and drink. The ELR also considers that in terms of likely premises to be required on the site these will comprise: high quality small and medium sized units which combine office and R&D / light industrial functions (B1), and large B2 units.
Suggested Intervention	Some of the vacant land appears to be coming forward for development (with one plot in particular having recently been sold, although the sale of the land doesn't necessarily indicate that development will be forthcoming), and therefore the **land should be protected for employment uses**. However,

	market speculation indicates viability concerns regarding potential contributions towards infrastructure provision. We are aware however of the adopted document from January 2007 'Development Contributions Towards Transport Infrastructure in Purbeck' where developers of individual plots are expected to contribute £47.48 per sq.m. of industrial floorspace or £75.96 per sq.m. of office space towards the implementation of the Purbeck Transportation Study. According to the Council's Economic Development Officer this has had the effect of releasing development in Purbeck which had hitherto been embargoed by highway infrastructure constraints. It is also noted that these contributions don't apply to existing buildings or consents granted prior to January 2007. We would however highlight the market perception of the above contributions which could place sites in Purbeck at significant commercial disadvantage when competing with other locations outside of the District. The RDA calculate that a typical employment development with 45% site coverage could equate to £80k per acre which does affect the likelihood of further space being brought forward. If land is within public ownership then these costs maybe absorbed, however for private developers this could represent a serious delivery issue. Therefore **further engagement with landowners is required and where necessary an open book appraisal exercise** should be undertaken. There is however a further clarity on the horizon as we are informed Purbeck will be included within the SE Dorset Transport contributions process which are likely to be of a similar level to those currently adopted by Purbeck. Developers require certainty (ahead of the LDF process) and therefore **short term guidance should be produced by the Council to confirm the level and triggers for financial contributions (if any) for infrastructure provision** to allow development proposals to come forward. In light of the preparation of the Purbeck Transportation Study and the adoption of the Development Contributions document (2007) **detailed transport improvements at Holton Heath now need to be drawn up and implemented**. We are told that the Council have already started to collect contributions and pass to the Highways Authority, of particular concern however is required improvements at Bakers Arms. The proposed 'Western extension' of Poole in the RSS (within Purbeck) may provide if brought forward, levels of contributions to infrastructure which could have major implications for the delivery of employment sites in the area. Should these contributions render land unviable then further options to deliver the required infrastructure, whether through funding or low levels of enabling development should be considered. We do however acknowledge the heathland protection requirements which currently exclude residential development from the site and surrounding vacant land in light of the required 400m exclusion zone. The development of the Holton Heath estate will need to **consider the aspirations of the owner of the adjacent Admiralty Park site** (considered below) and vica versa. A **comprehensive masterplan approach may assist in delivering any required infrastructure provision for both Holton Heath and Admiralty Park** or provide the basis for an infrastructure fund to be formed where developments for example could make contributions on a sq.m. basis, most likely in the context of the evolving SE Dorset Transport Contributions procedure

Images	 
SITE NAME	ADMIRALTY PARK – HOLTON HEATH
Area	Total: 17.0 / Available: 12.7ha
Allocation	The site is designated as a site of nature conservation interest within the Final Edition of the Purbeck Local Plan. A designated footpath / cycleway also runs through the centre of the site from north to south.
History	Site forms part of Royal Naval Cordite Factory and comprises the officer accommodation in the northern half and industrial buildings in the southern half. A Certificate of Lawful Use has been granted on 12.72ha for B1 use.
Strategic Access	Strategic access reasonable as approximately 2km away from the A35.
Site Access	Existing access is relatively poor via traffic signalled junction into 'country lane', however potential for access to taken to southern half of site through adjoining Holton Heath Industrial Estate.
Internal Environment	Northern half comprises a high quality parkland style setting with listed buildings and scheduled ancient monuments. Southern half comprises industrial and workshop style buildings of varying quality. The site includes a number of TPOs and Site of Nature Conservation Interest designations.
External Constraints	Site falls in close proximity to protected heathland (SSSI, Ramsar and Special Areas for Conservation). Existing roads access - might be capacity issues. The Local Plan Policy SS12 does not permit any development at Holton Heath likely to exacerbate traffic conditions on the A351 in advance of the implementation, or agreement on the provision, finance and programming, of transport measures to reduce the volume and impact of traffic on the A351. The Local Plan indicates a consultation zone from a hazardous installation covering the southern half of the site from a source to the south east of the site.
External Quality of Environment	The site is somewhat remote but in a high quality environmental setting. The southern industrial section adjoins the existing Holton Heath Industrial Estate.
Access to Facilities	The site is remote but benefits from access to Holton Heath rail station.

Other Comments	The site falls within a single ownership. Access constraints may be addressed by linking through the existing estate (infrastructure already in place but blocked), however we are informed by the Council that the access land in question currently lies within the control of a third party (believed to be British Land) and therefore forms a 'ransom strip' which may preclude a shared access solution between the Industrial Estate and Admiralty Park. The owner is keen to bring the site forward with refurbishment and redevelopment of parts of the site. Council has aspiration for high tech and B1 office use. Owner also may promote alternative uses but no application submitted yet. Offices and industrial units are being marketed to let. Within the ELR Stage 2 Purbeck DC identify the site as suitable for the sectors of advanced engineering and creative industries. The ELR also considers that in terms of likely premises to be required on the site these will comprise: high quality small and medium sized units which combine office and R&D / light industrial functions (B1), and high quality B1 office space.
Suggested Intervention	As noted above the approach to bringing the site forward should consider the potential implications on, and from, the future plans for the Holton Heath Industrial Estate. However, we do not consider that the development at Admiralty Park should be considered purely in conjunction with Holton Heath Industrial Park as in essence they shouldn't be competing for the same occupiers, with the Industrial Park focusing on B2/B8 occupiers and Admiralty Park looking to attract predominately B1 occupiers (with the exception of potential for limited B2/B8 elements in the southern section). However, the aspirations for attracting high technology uses and office space (whilst permitted on the site) are a question of demand. Following the take up of existing allocations at Holton Heath, Admiralty Park and Winfrith Technology Centre, should additional employment land then be required within the District, we are aware of further land being promoted between Admiralty Park and the Industrial Estate by British Land. Should this land be considered as an option, a **comprehensive assessment and masterplanning appraisal** should be undertaken to ensure that economic impacts (on the existing employment sites) environmental impacts (particularly the heathland), and transport are fully considered. The northern section of the site provides a high quality campus style setting which provides an opportunity for office/R&D based re-use. However the existing buildings may not meet modern requirements therefore **scope for very limited enabling uses through conversion such as hotel / leisure could be explored** although the highways access concerns will need to be considered in further detail. The heathland protection requirements also exclude residential development from the site and surrounding vacant land in light of the required 400m exclusion zone. The **development of a masterplan and development brief** will provide certainty to the owner and future occupiers and will allow for careful consideration of the interaction between the southern and northern sections of the site, as well as with the adjacent industrial estate. Full consideration will also need to be made to the existing entrance and scope for servicing the southern section of the site through the Holton Heath industrial estate. **In light of the ransom strip between both sites (being held by British Land who have alternative land to promote) the Council/DCC/SWRDA may need to consider their powers for CPO** to assist in the delivery of additional development on Admiralty Park by providing an alternative access arrangement. Although a CPO should be seen as a last

	resort and at this stage there does not appear to be a critical requirement to join the two sites together in terms of development thus avoiding the need for a CPO. A **robust but implementable travel plan** will also need to be established in light of the relatively detached location and potential junction constraints which fully explores the opportunities presented by the adjacent rail station. As noted for the Holton Heath site, we are aware of the adopted document from January 2007 'Development Contributions Towards Transport Infrastructure in Purbeck' where developers of individual plots are expected to contribute £47.48 per sq.m. of industrial floorspace or £75.96 per sq.m. of office space towards the implementation of the Purbeck Transportation Study. According to the Council's Economic Development Officer this has had the effect of releasing development in Purbeck which had hitherto been embargoed by highway infrastructure constraints. . It is also noted that these contributions don't apply to existing buildings or consents granted prior to January 2007. We would however highlight the market perception of the above contributions which could place sites in Purbeck at significant commercial disadvantage when competing with other locations outside of the District. The RDA calculate that a typical employment development with 45% site coverage could equate to £80k per acre which does affect the likelihood of further space being brought forward. If land is within public ownership then these costs maybe absorbed, however for private developers this could represent a serious delivery issue. Therefore **further engagement with landowners is required and where necessary an open book appraisal exercise** should be undertaken. There is however a further clarity on the horizon as we are informed Purbeck will be included within the SE Dorset Transport contributions process which are likely to be of a similar level to those currently adopted by Purbeck. Developers require certainty (ahead of the LDF process) and therefore **short term guidance should be produced by the Council to confirm the level and triggers for financial contributions (if any) for infrastructure provision** to allow development proposals to come forward. In light of the preparation of the Purbeck Transportation Study and the adoption of the Development Contributions document (2007) **detailed improvements at Holton Heath now need to be drawn up and implemented**. We are told that the Council have already started to collect contributions and pass to the Highways Authority, of particular concern however is required improvements at Bakers Arms. The proposed 'Western extension' of Poole in the RSS (within Purbeck) may provide if brought forward, levels of contributions to infrastructure which could have major implications for the delivery of employment sites in the area. However we understand that the basis for an infrastructure fund is most likely to come forward in the form of the evolving SE Dorset Transport Contributions procedure where developments will make contributions on a sq.m. basis.

Images	 
SITE NAME	**Winfrith Technology Centre**
Area	Total: 80+ ha / Available: 20ha
Allocation	The Local Plan 'Final Edition' allocates the site under Policy SS32 which permits development meeting the needs of firms requiring prestige sites for research and development or related uses within the policy area. Permitted uses include B1, B2 and ancillary B8 and development which does not adversely affect the attraction of the site as a prestige location for specialist R&D. The Council is also proposing an Area Action Plan for Winfrith, Wool and Bovington, to date regular workshop meetings have commenced with the key stakeholders working towards an adopted AAP in 2010. The Dorset Waste Local Plan proposes a Mechanical Biological Treatment plant and Refused Derived Fuel facility on a parcel of land immediately adjoining the south of the site.
History	Site developed to support Government Nuclear Research Centre which has been phased out but UKAEA still maintain facility to west of site. The site was acquired by English Partnerships (EP) in 2004 as well as additional Crichel Down land parcels around the site. EP have recently selected a development partner (a consortium known as Zog Brownfield Developments Ltd) who are now actively looking to promote the site for additional employment development. EP are retaining an interest and supporting Zog through a masterplanning process for the site exploring longer term potential for residential uses on parts of the site in addition to the short to medium term aim of intensifying the employment offer. An Enquiry by Design event hosted by the Princes' Foundation was held in April 08 to kick start the masterplan process. Significant planning history on site as a result of refurbishment of plots etc. A number of consents have recently lapsed for additional employment development, including 5ha on the 'gateway site' and 3.35ha on two other plots within the site.
Strategic Access	Reasonable distance from strategic road network (A35/A31/A37) although situated on A352 which links into network.
Site Access	Excellent immediate access into site from roundabout on A352 and extensive network of internal estate roads to high standard.
Internal Environment	Campus style business park with substantial buildings of varying quality and age, sited around significant undeveloped level grassed plots. Remnants of

	UKAEA buildings on western and southern sections of site.
External Constraints	Heathland constraints surrounding site (including SPA), flood risk implications on eastern section of site, sewerage facility consultation zone onto northern part of site, police helicopter landing pad adjoining eastern part of site, nuclear decommissioning to west of site. Transport issues within Wool with level crossing constraint on A352 approximately 1 mile to east of site.
External Quality of Environment	High quality environment, village of Wool to east of site and London railway line adjoins site to north.
Access to Facilities	Conference facility, canteen and small gym on site. Wool village facilities approximately 1 mile to east.
Other Comments	The site contains a number of significant occupiers including Qinetic. The residential development angle on the site is constrained in light of the 400m exclusion zone from the surrounding heathland.
Suggested Intervention	Since the acquisition by EP the site has not been actively marketed and therefore limited new interest has come forward for employment space within the site. However, the recent development partner appointment will result in a marked increase in marketing of the site and the development agreement commits the consortium to investing £millions in refurbishment of the existing building stock. The consortium are progressing with a masterplan for the site which will assist in providing certainty to potential occupiers of the future status of the site, the key concern however from EP and the developer is how this process will fit in with the preparation timescale of the AAP. Whilst the AAP process is clearly set out within the Council's Local Development Scheme and adoption unlikely to be until 2010/11, the **Council will need to ensure that employment applications can be determined through the existing Local Plan in advance of the AAP being adopted** to ensure employment development is delivered on the ground and the market not stifled. The existing Local Plan provides the framework in which applications can be determined for employment development until the LDF is adopted. Whilst the AAP timetable is a specific and transparent process it cannot be amended to simply fit in with the production of the developer's masterplan. However for the sake of delivering development on the ground, **once the masterplan is available the Council will need to show a level of commitment, for an initial phase of employment development at least** (if only for the employment elements in line with the existing Local Plan policy). **Backing for support services should also be demonstrated by the Council** in terms of facilities for the employees and Wool / Winfrith, these could include enhanced conference facilities, catering, hotel, gym and leisure. However, planning policy implications will need to be carefully considered as we understand that the Council will support enhancement of the current facilities on the site but would require further consideration in examining potential options for introducing new uses on the site, particularly with regards to those uses which may be considered contrary to policy. We are also aware that EP is keen to explore long term aspirations for residential development on parts of the site although they appreciate the environmental constraints (particularly in terms of the Heathland 400m buffer, flood risk and sewerage treatment works zone). As noted for the Holton Heath sites, we are aware of the adopted document from January 2007 'Development Contributions Towards Transport Infrastructure in Purbeck' where developers of individual plots are expected to contribute £47.48 per sq.m. of industrial floorspace or £75.96 per sq.m. of office

	space towards the implementation of the Purbeck Transportation Study. According to the Council's Economic Development Officer this has had the effect of releasing development in Purbeck which had hitherto been embargoed by highway infrastructure constraints. It is also noted that these contributions don't apply to existing buildings or consents granted prior to January 2007. We would however question the market perception of the above contributions which could place sites in Purbeck at significant commercial disadvantage when competing with other locations outside of the District. The RDA calculate that a typical employment development with 45% site coverage could equate to £80k per acre which does affect the likelihood of further space being brought forward. If land is within public ownership then these costs maybe absorbed, however for private developers this could represent a serious delivery issue. Therefore **further engagement with landowners is required and where necessary an open book appraisal exercise** should be undertaken. There is however a further clarity on the horizon as we are informed Purbeck will be included within the SE Dorset Transport contributions process which are likely to be of a similar level to those currently adopted by Purbeck. We understand however that the site purchaser was aware of the potential contributions at the time of purchase of the site. **Further work is also required to confirm the proposed realistic options for addressing the highway infrastructure restraints including bye pass options at Wool and Bere Regis**. We are informed that Purbeck DC have already started collecting contributions and passing them to the Highways Authority, however, to what extent these will assist in infrastructure delivery is unsure. We are also aware of significant environmental concern regarding the proposed Wool Bypass options. However we understand that the basis for an infrastructure fund is most likely to come forward in the form of the evolving SE Dorset Transport Contributions procedure where developments will make contributions on a sq.m. basis. We understand that the development partner for the site is committed to employment led development and is keen to explore the concept of a zero carbon development. They also believe there is a benefit in locating the MBT and RDF plant within / adjacent to the site and using the energy created to assist in developing a zero carbon scheme. This approach should be commended and fully supported. The **'green' angle will be key in attracting the occupiers** as the site appears to provide a role for businesses over and above those typical to the local market. The Council have also backed the zero carbon aspirations and indicated a preference for knowledge based employment and may **consider partnering the landowner in bringing forward incubation and innovation facilities** for this purpose. The above mentioned 'green' aspirations may well result in high specification, higher cost buildings being provided. **Local agents have commented that lower cost space has been successful to serve the local market** using Southwell Business Park as an example in light of its reasonably similar remote location. There could be a **role for SWRDA** with it's economic development experience working alongside English Partnerships to look at options in identifying appropriate employment uses for the site and to promote such developments within the site.

Images	 

WEST DORSET

SITE NAME CHICKERELL, POLICY EA7 (I)

Size	Total: 4.2 ha / Available: 4.2 ha
Allocation	Existing employment allocation
Planning History	1/D/07/001294 to erect 7 units for B1 use, together with access and estate roads. The application was withdrawn. 1/D/08/000681 to develop land by the erection of 7 units for B1 (business) Use Class with “access” and “layout” to be determined at this outline stage (Outline). Undecided at 13/06/08.
Strategic Access	Strategic access is limited as the site is adjoining a suburb of Weymouth with its relatively poor strategic road access, being removed from the main east-west road system. Within that setting, local access is good being directly linked to the A354 by the B3157.
Site Access	Site access is good.
Internal Environment	Reasonably flat piece of land with some small old structures and containers on it. In parts in agricultural use.
External Constraints	No obvious external constraints. To the North of the site there is an area designated in the Local Plan as area with landscape importance. There is a transfer station to the north of the site.
External Quality of Environment	The site is next to the Police Headquarters and the Weymouth Football Club. It’s close to the existing industrial estate. The site is a good location for employment use.
Access to Facilities	Access to facilities is not clear. With the level of employment in the area there are some facilities within walking distance.
Other Comments	The site is owned by a trust, and despite the current employment application the applicant may have other aspirations for the site which have been demonstrated through the submission of site to the Council’s Strategic Housing Land Availability Assessment as a candidate housing site. The site has been allocated in excess of 10 years.
Suggested	Our recommendation is to carry **clear strong policy for the protection of the site for employment uses** forward to the LDF as it is one of the few available

Intervention sites serving the Weymouth employment market.

A **more proactive approach by the public sector** might be the way forward as this is one of the few available employment locations that could serve Weymouth (although it's in West Dorset). **Further engagement with the landowner is required** to ascertain their aspirations and timescales for the site. This may also unearth any potential delivery constraints. Following engagement, the prospect of involvement of West Dorset DC/ Dorset CC / the RDA can be considered further.

Images

SITE NAME CHICKERELL, SITE EA7 (II)

Size Total: 4 ha / Available: 4 ha

Allocation Employment allocation carried forward from 1998 Local Plan.

Planning History Approved planning application for a range of small to medium scale business uses within class B1 on part of the site.

Strategic Access Strategic access is limited as the site is adjoining a suburb of Weymouth with its relatively poor strategic road access, being removed from the main east-west road system. Within that setting, local access is good being directly linked to the A354 by the B3157.

Site Access Site access is very good off a new main road (B3157).

Internal Environment Flat open land with no obvious constraints.

External Constraints There is heritage coast to the west of the site. Requires high quality design of the western frontage. There is a caravan park to the south of the site and there is a big industrial estate to the east of the site.

External Quality of Environment Very good. Very prominent site.

Access to Facilities Access to facilities is not clear. With the level of employment in the area there are some facilities within walking distance.

Other Comments There is outline planning consent on the western part of the site including the area to the West of the site up to the road. We understand that there is interest on the remaining part of the site for commercial development from developers and from occupiers from the existing industrial estate to the East of the site. No obvious reasons why this should not come forward.

We understand however there are two landowners (one of which has the outline planning consent) and their aspirations are not known at this stage.

Suggested Intervention

This is an excellent employment site with no obvious constraints serving the Dorchester & Weymouth TTWA, which has a limited supply of industrial / employment land opportunities. The **site should be clearly safeguarded for employment uses** (B1, B2, B8) through the planning process.

A **more proactive approach by the public sector** might be the way forward as this is one of the few available employment locations that could serve Weymouth (although it's in West Dorset). **The public sector could facilitate engagement with both the landowners** to ascertain their aspirations and timescales for the site **and assist in bringing both elements forward together**. This may also unearth any potential delivery constraints. Following engagement, the prospect of involvement of West Dorset DC/ Dorset CC / the RDA can be considered further.

Images

SITE NAME POUNDBURY

Size

Total: 6 ha / Available: 6 ha (of employment allocation within the future phases of Poundbury).

Allocation

New, mixed use allocation for B1 and B2 uses.

Poundbury is the principal allocation of development land for Dorchester. Employment is part of a wider mixed use development. Intended that further phases will provide light industrial and office. Progression of the employment phases will be related to the rate of development over the plan period to 2016, expected take up rates and occupier demand, which will inform the mix of employment uses and marketing approach to the release & development of further employment land at Poundbury.

The planning brief contains an element of general industrial use which will be subject to a buffer of B1 uses to mitigate harmful effects on residential element.

Planning History

There is a development brief for Poundbury. A number of employment developments have already been brought forward on the site including industrial and office.

Strategic Access

Strategic access is good with the A35 and the A37 running alongside the site.

Site Access

Site access seems to be good. However, we understand that there are capacity issues on the existing road system.

Internal Environment

Large parts of the site are sloping but, other than that, they are cleared. Parts of the site are in an Area of Outstanding Natural Beauty and groundwater source protection zone as is most of Dorchester. However, the site is designated for mixed use development in the Local Plan and therefore it is assumed there should not be too many environmental issues to overcome.

External Constraints

Road capacity might be an issue. Also access to the sites would be through existing residential areas. The residential development of Poundbury is very high quality with very demanding residents and landowners.

External Quality of Environment

Poundbury is a very high quality development as an extension of Dorchester, which in itself provides a very high quality of environment.

Access to Facilities

Access to facilities is good with provision in Poundbury and Dorchester although at the moment Poundbury has reasonably limited facilities.

Other Comments

With the image of Poundbury development is relatively expensive. It caters predominantly for a high end commercial market for employers which can profit from being associated with Poundbury (e.g. Dorset Cereals). The parking regime of Poundbury, with its on-street parking policy, might imply an issue for larger employers. The mixed use allocation of Poundbury might provide a challenge for delivering B2 uses, for which there is little supply in the area.

There appears to be an empty office / light industrial unit, formerly occupied by JPL Photography.

Suggested Intervention

There is an existing development brief for Poundbury and a committed developer. Therefore there is little additional planning intervention which could help to bring the site forward other than a **strong policy stance for the retention of the land for the specific B class uses**.

A **pro-active approach by the public sector** to ensure that the proposed B2 uses south of the Parkway will be delivered in the proposed phasing (2007-2010) in accordance with the development brief. Whilst this has been difficult in practice this could include identifying potential occupiers and solutions for mitigating bad neighbourhood issues. **Targeted marketing campaigns** could also be undertaken following discussions with the site owners to establish a target list of potential occupier sectors.

Images

SITE NAME BARTON FARM, SHERBORNE, POLICY NA1

Size

Total: 3.5 ha / Available: 3.5 ha (of employment land as part of a wider mixed use development)

Allocation

Designated as part of mixed use development in 2006 Local Plan.

Land at Barton Farm forms part of a mixed use scheme for residential, employment and open space. There is a Barton Farm Development Brief SPD

	adopted as part of LDF.
Planning History	None.
Strategic Access	Relatively good strategic access off the A30 dual carriageway not far from Yeovil.
Site Access	The site is allocated for mixed use development. Site access arrangements don't seem to be clear at this stage. We suggest different access for the residential and employment part of the site. As part of the development improvements to the junction with the A30 are required.
Internal Environment	Relatively flat, big open greenfield site. Currently in agricultural use. A proportion of the southern part of site is in Conservation Area and contains a grade II listed building.
External Constraints	The site seems to be one of the few places for an urban extension of Sherborne. All the other town edges seem constrained by environmental designations or the rail line. Landscaping will be an important element to minimise impact of development on the surrounding countryside. Any development of the site will require major highway improvements (junction with the A30).
External Quality of Environment	Sherborne has a very high quality environment.
Access to Facilities	The site is in reasonable distance from the northern end of the town centre.
Other Comments	Sherborne has a high quality environment and any employment use will have to be designed with regards to that which obviously has viability risks. The site is allocated as a mixed use development and there is a risk that the site will only cater for a specific segment of the market such as high end office accommodation.
Suggested Intervention	There is an existing development brief for the site. However, there are some significant issues to overcome (access for residential and employment use, neighbourhood issues and buffering between the uses, landscaping). An **independent masterplan appraisal** could help to identify the level of cross subsidies for infrastructure (e.g. improved junction with A30, site access) which can reasonably be expected from the residential development towards the employment part of the development. This may require further **specific feasibility work on infrastructure requirements**. Once the masterplan has been tested for viability the **public sector should show a commitment to development guidelines** for the site to provide certainty to the market.

Images

SITE NAME	NORTH OF BROADWINDSOR ROAD, BEAMINSTER, WA1
Size	Total: 3.7 ha / Available: 3.7 ha
Allocation	Employment allocation carried forward from 1998 Local Plan
Planning History	None
Strategic Access	Strategic access is relatively poor as Beaminster is not on the main road system.
Site Access	Development would be dependent on ensuring adequate access. There may be a fibre optic cable at access point that would require protection.
Internal Environment	A slightly sloping Greenfield site, with a hedgerow running through the site and a watercourse running along the eastern boundary of the site.
External Constraints	There are landscape issues as the site is relatively exposed. There are also access issues (see above) that need to be resolved.
External Quality of Environment	The site is next to an existing industrial development (Clipper Tea) set in a rural environment.
Access to Facilities	Access to facilities is reasonable with the town centre being within walking distance.
Other Comments	We understand that the RDA has investigated the development options and costs for the site and have found that, given the existing constraints, employment development is not likely to be viable. We understand the South West RDA commissioned White Young Green to undertake an appraisal of enabling works which equated to £1.5m, further commercial appraisal work was undertaken by Goadsby. In light of the appraisal findings it was concluded that the site would result in a shortfall of £3-4m should employment uses be promoted.
Suggested Intervention	The site has poor strategic access and faces a number of development constraints (local access, landscaping, environmental) leading to the conclusion that (according to SWRDA confirmed as £3 -4m shortfall) employment development is not likely to be viable However, the site serves as an important option for Clipper Tea to expand if they wish to, however we understand the site is not within their ownership. We therefore recommend that the site **is de-allocated from general employment** designation (and therefore not counted to overall employment land supply). We recommend **further engagement with Clipper Teas for an updated position**

on potential expansion before recommending any additional further actions.

WEYMOUTH AND PORTLAND

SITE NAME MOUNT PLEASANT BUSINESS PARK (NEW LOOK)

Size	Total: 14.0 / Available: 8.4 ha
Allocation	Land at Mount Pleasant was allocated for employment use in the 1997 Weymouth & Portland Local Plan. Land is allocated for industrial / commercial use under policy ED1.
Planning History	Existing planning permission from 2007 (07/00442/otles) for mixed use employment - and new headquarters building for the company as well as office, B1, B8, A1 retail, ambulance station; hotel etc etc. This outline consent is subject to a 106 agreement which addresses phasing of development and the requirement to provide small scale enterprise units. The site was originally acquired by New Look and was developed part for its headquarters and distribution operations. However the distribution centre has been relocated to a more central location in the UK and surplus land and buildings are now available.
Strategic Access	The Compulsory Purchase Order for the Weymouth Relief Road (The Orange Route), has been approved by government, planning consent is in place and construction is expected to start in late This will improve strategic access directly into the Mount Pleasant Site.
Site Access	Site access is currently good and with the new relief road will be very good.
Internal Environment	A large distribution warehouse (by New Look), the New Look HQ and some industrial units on the site. The vacant land is serviced by road and is readily available for development.
External Constraints	There is a residential area, set back and raised, to the south east of the site but the relationship between these properties and adjacent development has been carefully considered as part of the planning process and is not considered to be a major issue for employment development. Detailed planning consent is required prior to development being undertaken.
External Quality of Environment	Good setting for employment use.
Access to Facilities	Access to facilities is good with a superstore adjacent to the site and the town centre not very far away to the south. There is also planning permission for a health centre as part of the overall package of development.
Other Comments	The available land at Mount Pleasant Business Park constitutes the largest employment allocation in Weymouth itself, is an excellent business location and is ideally suited for development by the firm or for an alternative employment use. The land is owned by New Look and they are interested in discussing partnership arrangements with other parties.
Suggested	Given the site's good location next to the relief road and the absence of any

Intervention

obvious physical development constraints we believe this as a good quality employment site with the potential to deliver to meet the local demand for office and industrial uses.

The Council and the RDA should continue with the existing levels of **engagement with the land owner New Look** to ascertain their aspirations for the site and offer assistance (if considered necessary) in overcoming constraints to development. We understand that the outline planning permission includes a phasing programme already in terms of requiring certain elements before others.

Images

SITE NAME OSPREY QUAY

Size

Total: 19.4 ha / Available: 8.1 ha

Allocation

Allocated for mixed use in the Local Plan. The closure of the former Royal Naval Air Station contributed to the ending of naval activity on Portland, but the vacant site has provided a regionally significant regeneration opportunity. The site was acquired and is being developed by SWRDA, and is now known as “Osprey Quay”.

Planning History

2002 outline planning permission was granted for a mixed use redevelopment scheme for Osprey Quay to incorporate leisure, tourism, recreation, employment and residential uses and was accompanied by a 106 agreement.. Planning consent has been granted for an extension to the sailing academy facilities, the new marina and associated on shore development, a major expansion to the Sunseeker boat building operation and for the mixed use ‘Castle Court ‘ development, and other marine related schemes.

Strategic Access

Strategic access will be improved as a result of the Weymouth Relief Road (Orange Route) and there are further on line improvements to Portland Road planned as part of the Olympic Transport Package and other funding contributions.

Access to the main east-west roads (A35) is at Dorchester as is access to the A37 which gains access to the M5 at Taunton.

Site Access

Site access is very good. It is serviced by a number of access roundabouts off the main A354 road to Portland.

Internal Environment

Flat land, some cleared, most recently the former ‘Tank Farm’ site, where land is being held for temporary uses associated with the 2012 Games, prior to it being made available for employment uses. Flood prevention measures have also been put in place The site development plans are well advanced and progressing with a view to the site contributing to the Borough becoming a’Centre for Marine Excellence’.

External Constraints	Infrastructure works have been put in place to address flooding and strategic access requirements.
External Quality of Environment	Very good setting for marine related businesses, and slipway access has been improved. Good location for a business park in general with good visibility from the main road. Home to UK Olympic sailing team's training facilities and host location for the London 2012 Olympic and Paralympic Sailing events.
Access to Facilities	With the marina development on the site and the town centre and Portland being close by, access to facilities seems to be reasonable.
Other Comments	The site is promoted by the RDA and land is readily available and serviced for further employment development. The RDA propose 6-7 acres of employment land before 2012 and land on the tank farm (9 acres) thereafter. We understand from the RDA that margins on delivering employment space are tight, however the proposed units at the Marina are all pre-let.
Suggested Intervention	The acquisition, masterplanning, development and promotion of the site by the RDA has successfully brought this site forward which now has some significant anchor tenants including the RYA for Team GB HQ at Castle Court. **Direct water access for the northern part of the development** increases the attractiveness of the site for marine related industries, which is compatible with the Economic Vision for Weymouth & Dorchester. Whilst the RDA are not proposing the development of a new slipway **increasing access to the existing slipway** has demonstrated to be an attractive proposition to existing (such as Sunseeker) and new businesses. The choice of the WPNSA as the 2012 Olympic venue will raise the profile of the site which should provide obvious **knock on marketing benefits which should be fully exploited**.
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C – REVIEW OF EXISTING EMPLOYMENT LAND FORECASTS

INTRODUCTION

As part of the commission for the Bournemouth, Dorset & Poole Workspace Strategy GVA Grimley have proposed to undertake a top-down employment land demand forecast, review district level forecasts and reconcile the different forecasts.

During the process of this work it emerged that there are four different forecasts to be considered: 1) a forecast as part of the Demand and Supply of Employment Land, Sites and Premises in South West England study (January 2007) by DTZ for South West RDA, 2) a forecast by Dorset County Council as part of the Employment Land Review process undertaken by the District, 3) the forecast by Dorset County Council on which the RSS Panel Report is assumed to be based, and 4) a forecast by Roger Tym & Partners as part of their commission by the Regional Assembly.

Each of these forecasts uses different assumptions and they result in a wide range of demand future land requirements (from 36ha to 229ha). It therefore seems appropriate to fully understand the different approaches to be able to identify a robust and for all parties acceptable employment land demand forecast.

This Briefing Note gives an overview of each of the four forecasts, discusses their respective strength and weaknesses and suggests a preferred methodology to be used for the Workspace Strategy.

DTZ FORECAST

We regard the employment land demand forecast by DTZ is a ‘mature’ forecast with a high level of sophistication. It is based on three key components:

- Demand for sites and premises to accommodate economic growth;
- Demand for sites and premises to replace stocks lost through dilapidation and change of use;
- Appropriate provision to ensure choice in the market.

Land demand forecasts are given on SSCT level and are therefore not directly applicable to the Workspace Strategy[44]. The projected employment land demand between 2006 and 2026 for the SSCTs in the sub-region are: 78 ha for Bournemouth, 33 ha for Dorchester & Weymouth and 74 ha for Poole.

Each of the three key components of the DTZ forecast is discussed below

DEMAND TO ACCOMMODATE ECONOMIC GROWTH

For the economic growth Cambridge Econometrics' 3.2% GVA growth scenario is used. This is in line with the assumptions for the Workspace Strategy.

Employment forecasts by sector are converted into Use-class related employment. The conversion matrix[45] used "has been developed by considering the functions/activities which take place within each industrial sector (using detailed sectoral data from the Annual Business Inquiry)".

However, the conversion matrix used does not accord with the Employment Land Review Guidance by the then ODPM and the assumptions made are not fully transparent. We have made some sensitivity analysis on these assumptions and it appears that they have a significant influence on the outcome of the employment land demand forecasts and a further analysis of the conversion matrix seems therefore appropriate. The assessment is based on our extensive experience in this field.

The same conversion matrix has been applied across the whole South West. From experience we know that the proportion of different sectors in each use-class can vary significantly from district to district. This is a point which has also been picked up by RTP in their presentation.

The round figures in the conversion matrix suggest that broad assumptions were made which might be difficult to defend. Each of the assumptions is discussed in the table below based on our own extensive experience in undertaking similar excursuses.

[44] A requirement of the Workspace Strategy is to provide employment land demand forecasts by TTWA and by districts.
[45] The report provides two matrixes: one for the current situation and a second based on assumptions on how this might change in the future. As we understand it the second one is then used for the forecast.

Sector	Offices (B1a)	Other Business Space (B1 b/c, B2)	Warehousing (B8)	Non B Use Class	Comment by GVA Grimley
1 Agriculture etc	0%	0%	10%	90%	Although we recognise that there is most likely some warehousing activity related to agriculture it is not clear how the 10% assumption has been derived. It is also not clear on how much of the agricultural related warehouse activities are actually assigned to wholesale sectors such as “Wholesale of grain, seeds and animal foods”. The assumption seems arbitrary and therefore difficult to defend. We suggest using the generally accepted ODPM approach of allocating all agricultural employment to Non B Use Class.
2 Mining & Quarrying	0%	10%	15%	75%	As above.
3 Food, Textiles & Wood	0%	90%	10%	0%	There is a general assumption that 10% of manufacturing employment is warehouse related. It is not clear on what bases this assumption is made. Most of the manufacturing sectors have a related wholesale sector (as with agriculture above) and it is not clear on how these are distinguished. The assumption seems arbitrary and therefore difficult to defend. As wholesale has much lower employment densities this assumption has a significant impact on the overall employment land demand. We suggest using the generally accepted ODPM approach of allocating all manufacturing to B1c and B2.
4 Printing & Publishing	0%	90%	10%	0%	As above
5 Chemicals & Minerals	0%	90%	10%	0%	As above
6 Metals & Engineering	0%	90%	10%	0%	As above
7 Electronics	0%	90%	10%	0%	As above
8 Transport Equipment	0%	90%	10%	0%	As above
9 Manufacturing nes	0%	90%	10%	0%	As above
10 Electricity, Gas & Water	0%	50%	0%	50%	The apportionment seems arbitrary when checking against the relevant 4-digit-SIC codes. We would expect some office related employment (e.g. from the “Distribution and trade in electricity” sub-sector. Experience from other studies show that demand for land for utilities is very poorly linked to employment figures. We suggest to use incorporate demand for land from utilities not based on employment forecasts and to use other figures to estimate this demand.

Sector	Offices (B1a)	Other Business Space (B1 b/c, B2)	Warehousing (B8)	Non B Use Class	Comment by GVA Grimley
					This is a relevant sector as many of these uses are actually often located on designated employment land.
11 Construction	5%	5%	15%	75%	Again the apportionment seems arbitrary. Our own work and work by RTP for the GLA suggest different apportionments. We suggest using our apportionments which are in line with RTP's work.
12 Distribution/Retail	5%	5%	20%	70%	From the 4-digit-SIC analysis it is difficult to justify B1 uses in this sector although there is most likely to be some ancillary office space. However, most of this office space is not likely to be classified as B1. The same applies to the allocation to "Other Business Space". Based on our 4-digit-SIC analysis the conversion of sector employment to use-class employment in the Distribution/Retail sector varies significantly between the different districts. We therefore suggest a district based approach.
13 Hotels & Catering	5%	5%	0%	90%	Although we recognise that there is most likely some office related activity in the hotel & catering sector it is not clear how the 5% assumption has been derived. The same applies for the assumption that 5% are based in 'other business space'. The assumption seems arbitrary and therefore difficult to defend. We suggest using the generally accepted ODPM approach of allocating all hotel & catering employment to Non B Use Class. However, the fact that there are hotels and restaurants on employment land will have to be taken into account. We suggest doing this in a more transparent way by making a provision for Non-B-class uses on designated employment land.
14 Transport & Comms.	10%	5%	35%	50%	Based on our 4-digit-SIC analysis the conversion of sector employment to use-class employment in the Transport & Communications sector varies significantly between the different districts. We therefore suggest a district based approach.
15 Banking & Insurance	80%	0%	0%	20%	The 20% allocation to 'Non B use class' takes into account the A2 part of banking. However, it is not transparent how this figure has been derived and it seems therefore somewhat arbitrary.
16 Other Business Serv.	80%	10%	0%	10%	This seems a reasonable assumption
17 Public Admin. & Defence.	40%	5%	5%	50%	Based on our 4-digit-SIC analysis the conversion of sector employment to use-class employment in the Public Admin & Defence sector varies significantly between the different districts. We therefore suggest a district based approach.
18 Education & Health	20%	5%	3%	72%	Although we recognise that there is most likely some office related activity in the education & health sector it is not clear how the 20% assumption has been derived. The same applies for the assumption that 5% are based in 'other business space' and 3% in warehouses. We would assume that much of the office space would be ancillary (e.g. offices in hospitals, schools,

Sector	Offices (B1a)	Other Business Space (B1 b/c, B2)	Warehousing (B8)	Non B Use Class	Comment by GVA Grimley
					universities). However, the fact that there are education and health facilities on employment land will have to be taken into account. We suggest doing this in a more transparent way by making a provision for Non-B-class uses on designated employment land.
19 Miscellaneous Services	20%	0%	0%	80%	The assumptions seams reasonable although again a bit arbitrary.

The DTZ forecast also assumes that in four sectors (Retail & Motor Trades, Hotel & Catering, Education & Health and Miscellaneous Services) 10% of the Non-B-use-class employment will be provided on employment land.

The broad assumptions made by DTZ seem in most cases logical and reasonable and are appropriate for a high level strategic assessment. However some of the assumptions are somewhat arbitrary and therefore undermine the robustness of the approach. This is of high relevance where evidence is required for LDF processes.

We suggest a conversion matrix based on a district level 4-digit-SIC analysis based on ODPM guidance and clear indications which sub-sectors (on 4-digit-SIC level) are assumed to contribute to each use-class.

The next step in the forecast is translating employment into floorspace requirements. DTZ are basing employment density assumptions on generally accepted research and quote different densities for different office, industrial and warehousing uses as shown below.

DTZ Employment Density Assumptions

Table 1.2 Employment Density - 2006 Assumptions

Employment Category	Assumption
Office	The work by Arups notes a range of office uses with varying densities. For the purposes of this study we have used an average of the varying densities presented. This is in line with previous DTZ work on future office demand in the South West. General offices – 19 sq m per employee Headquarters – 22 sq m per employee Serviced Business Centre – 20 sq m per employee Call Centre – 13 sq m per employee **Average – 18.5 sq m per employee**
Other Business Space	Again, the Arups report presents a range of industrial and light industrial employment densities. We have taken an average position. General Industrial – 34 sq m per employee Small Business Units – 32 sq m per employee High Tech/R&D – 29 sq m per employee Science Park – 32 sq m per employee **Average – 32 sq m per employee**
Warehouse	Two types of warehouse densities are presented. Again we have adopted the mean. General Warehousing – 50 sq m per employee Large Scale/High Bay – 80 sq m per employee **Average – 65 sq m per employee**

Taking an un-weighted average density for each employment category assumes that the same number of employees work in each of the different types of office, industrial and warehouse uses, respectively[46]. For the office and other business space employment categories this approach results in similar figures as recommended in the ODPM Guidance.

However, for the warehouse employment category the employment density assumed by DTZ is much lower. This is a result of the assumption that half of all warehousing employees will work in large scale or high bay warehouses. Furthermore DTZ has assumed that this figure will further increase in the future and have used a figure of 70 m^2 per worker for their forecast. In the light of the type of warehousing in large parts of the sub-region this seems a very low employment density. In combination with the assumption of 10% of manufacturing employees using warehousing space this increases the forecast significantly.

The final step in translating employment growth into land demand involves applying plot ratios to the floorspace figures. For the office component DTZ assumes a plot ratio of 1.75 which is much higher than research by Dorset District Council suggests[47]. The plot ratio assumptions for other business space and warehousing are in line with the ODPM guidance and the DCC research.

DEMAND TO REPLACE STOCKS LOST THROUGH DILAPIDATION AND CHANGE OF USE

DTZ have taken a very sophisticated approach in identifying the amount of premises that are likely to need replacement during the planning period and what amount of these can be recycled for other B-class employment uses (change from other business space to warehousing and office). The net replacement demand (total replacement minus amount that can be recycled) is then assumed to be re-provided on new employment land.

Although we accept that some new employment land is required to allow for replacement the DTZ analysis does not take into account that a significant amount of premises in need for replacement will be replaced on existing employment land.

From a planning point of view we would suggest that the default assumption would be that employment premises that are in need of replacement will be re-provided on existing employment land and that the loss of employment land to other uses (e.g. housing, retail) should be the exception. The requirement of 60% of new houses to be built on brownfield land quoted by DTZ to support their assumption can not mean that houses are built on brownfield employment land and new, greenfield employment land is required to replace employment land with old employment premises.

[46] For example this means that the same number of employees work in office headquarters as in call centres which seems an unreasonable assumption.
[47] The analysis of completions between 1994 and 2007 by DCC suggests that office plot ratios vary between 0.97 in Bournemouth and 0.2 in North Dorset.

The assumption by DTZ that all old industrial stock which can not be recycled for office or warehousing uses will have to be re-provided on new, greenfield land equates to 36% of the total land demand for the South West.

APPROPRIATE PROVISION TO ALLOW FOR CHOICE

An allowance of 10% is made in the forecast to accommodate choice. There is no justification for this figure in the report.

DORSET COUNTY COUNCIL FORECAST

Dorset County Council has provided the districts in the sub-region with an employment land demand forecast. The forecast is based on Cambridge Econometrics employment forecast (3.2% GVA growth) and applies employment densities, plot ratios and a 10% factor for choice to these figures to derive future land demand.

The forecast projects an overall demand of 229 ha for the sub-region, which seems very high. The main assumptions of the forecast approach are discussed below.

EMPLOYMENT GROWTH

The DCC methodology establishes the proportion of current B-use-class employment (between 42% and 52% of total employment) and applies this proportion to the total employment growth between 2006 and 2026. However, an analysis of employment growth by sector shows that only about 20% of future employment growth will be in B-use-class employment. The approach taken by the DCC results in a significant overestimate of future employment land demand.

EMPLOYMENT DENSITIES

Average employment densities of 50 m^2 per employee for all use-classes are assumed across all districts with the exception of Bournemouth and Poole where an average employment density of 36 m^2 per employee is assumed.

This assumption is significantly higher than the ODPM guidance and increases the employment land demand forecast considerably.

PLOT RATIOS

Based on completion data for the sub-region over the last 13 years the District Council has calculated plot ratios for each district. Average plot ratios have been applied to all use-classes.

RSS PANEL REPORT

The 110 ha of demand for the TTWAs in the sub-region mentioned in the RSS panel report is assumed to be based on work done by Dorset County Council. The forecast covers the following districts: Bournemouth, Christchurch, East Dorset, Poole and Purbeck.

The methodology is based on two sets of forecasting approaches – one based on the land requirements arising from the forecast increase in labour demand and the other from the projected increase in labour supply. In order to ensure that a wide variety of sites would be available, for each district the higher of the demand or supply figures was used.

The source of the employment forecast (labour demand) is the SWRA and Dorset LEFM model. The source for the population projections (labour supply) is not clear.

The remaining assumptions (B-use-class employment, employment densities and plot ratios) for the forecast are very similar to the Dorset County Council forecast discussed above.

Furthermore an adjustment for the reuse of 50% of currently vacant buildings is made. With regards to the supply of employment land the Modifications now recommend the provision of 152 hectares of employment land (including 20 hectares of employment land at Area of Search 7G to the west of Ferndown), rather than the search for 110 hectares as stated in the Panel Report. The 152 hectares is consistent with the DTZ and South West RDA regional assessment and comprises existing commitments and additional allocations within the Bournemouth and Poole TTWA rather than the conurbation.

A FORECAST BY ROGER TYM & PARTNERS

Roger Tym & Partners have been instructed by the SWRA to provide guidance to the districts in the region on how to use employment forecasts for their employment land studies. As part of this work they have produced high level floorspace forecasts based on Cambridge Econometrics employment projections (2.8% and 3.2% GVA growth rate), applying standard employment densities.

The forecast results in an employment land demand of 36 ha to 47 ha depending on the plot ration applied (standard 0.4 for all B-use-classes and districts, or plot ratios based on DCC research by district).

At this stage RTP have not provided the detailed assumptions on how they converted sectors into B-use-class categories. However from previous published work by RTP and from the results we assume that RTP has used an approach which is close to the ODPM guidance and has incorporates most likely some refinements.

D – DISTRICT LEVEL DEMAND AND SUPPLY

DEMAND

Bournemouth

Total	2006-2011	2011-2016	2016-2021	2021-2026	2006-2026
	ha	ha	ha	ha	ha
Office	9.5	5.4	4.1	2.9	21.9
Industrial	4.5	8.1	0.1	-8.7	4.1
Windfall losses	1.9	4.1	3.6	2.4	12.1
Churn	0.8	1.5	0.5	-0.6	2.1
Total	**16.7**	**19.1**	**8.4**	**-4.0**	**40.2**

	2006-2011	2011-2016	2016-2021	2021-2026	2006-2026
	ha	ha	ha	ha	ha
Office	10.9	8.3	6.2	3.8	29.2
Industrial	5.8	10.8	2.1	-7.8	10.9
Total	**16.7**	**19.1**	**8.4**	**-4.0**	**40.2**

Christchurch

Total	2006-2011	2011-2016	2016-2021	2021-2026	2006-2026
	ha	ha	ha	ha	ha
Office	0.9	0.2	0.4	0.5	2.0
Industrial	-1.6	-1.2	-0.9	-1.3	-5.0
Windfall losses	1.0	1.2	1.1	1.2	4.6
Churn	0.8	0.4	0.2	0.6	2.1
Total	**1.2**	**0.7**	**0.8**	**0.9**	**3.6**

	2006-2011	2011-2016	2016-2021	2021-2026	2006-2026
	ha	ha	ha	ha	ha
Office	1.2	0.5	0.6	0.8	3.0
Industrial	0.0	0.2	0.3	0.2	0.7
Total	**1.2**	**0.7**	**0.8**	**0.9**	**3.6**

East Dorset

Total	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	1.9	0.8	0.7	0.2	3.6
Industrial	13.8	-10.3	14.4	-6.8	11.1
Windfall losses	1.4	1.6	1.4	1.2	5.6
Churn	0.4	0.2	0.4	0.1	1.2
Total	**17.6**	**-7.7**	**16.9**	**-5.3**	**21.5**

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	2.2	1.0	1.0	0.4	4.5
Industrial	15.4	-8.7	16.0	-5.7	17.0
Total	**17.6**	**-7.7**	**16.9**	**-5.3**	**21.5**

North Dorset

Total	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	1.9	1.1	1.0	1.0	5.0
Industrial	0.7	-0.9	-1.7	-0.7	-2.6
Windfall losses	3.6	3.6	3.6	4.2	15.0
Churn	-5.8	3.6	8.3	1.9	8.0
Total	**0.4**	**7.4**	**11.1**	**6.5**	**25.3**

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	1.7	1.8	2.1	1.6	7.2
Industrial	-1.3	5.6	9.0	4.9	18.2
Total	**0.4**	**7.4**	**11.1**	**6.5**	**25.3**

Poole

Total	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	8.4	6.0	5.4	4.1	23.9
Industrial	-2.6	-2.3	-3.1	-1.6	-9.6
Windfall losses	3.4	3.4	3.4	3.0	13.2
Churn	2.7	2.1	3.9	0.8	9.5
Total	**11.9**	**9.1**	**9.5**	**6.4**	**36.9**

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	9.7	7.1	6.9	4.9	28.6
Industrial	2.2	2.0	2.6	1.5	8.3
Total	**11.9**	**9.1**	**9.5**	**6.4**	**36.9**

Purbeck

Total	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	2.2	1.1	0.2	0.4	3.9
Industrial	-0.9	-0.3	-0.7	-0.7	-2.7
Windfall losses	2.8	2.8	0.0	2.8	8.5
Churn	0.6	0.1	0.6	0.5	1.8
Total	**4.7**	**3.7**	**0.1**	**3.0**	**11.5**

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	3.1	1.8	0.4	1.3	6.5
Industrial	1.7	1.9	-0.3	1.7	5.0
Total	**4.7**	**3.7**	**0.1**	**3.0**	**11.5**

West Dorset

Total	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	3.3	2.1	1.7	2.1	9.3
Industrial	-0.3	1.9	-0.2	0.6	2.0
Windfall losses	4.2	4.9	4.2	4.9	18.1
Churn	8.4	-8.3	7.6	2.5	10.2
Total	**15.6**	**0.6**	**13.4**	**10.0**	**39.6**

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	5.6	1.5	3.9	3.4	14.5
Industrial	10.0	-0.9	9.5	6.6	25.1
Total	**15.6**	**0.6**	**13.4**	**10.0**	**39.6**

Weymouth & Portland

Total	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	1.3	-0.1	-0.2	0.3	1.4
Industrial	11.4	-8.0	-0.6	-0.6	2.1
Windfall losses	0.6	0.3	0.3	0.6	2.0
Churn	0.0	0.1	0.0	0.0	0.1
Total	**13.4**	**-7.7**	**-0.5**	**0.4**	**5.6**

	2006-2011 ha	2011-2016 ha	2016-2021 ha	2021-2026 ha	2006-2026 ha
Office	1.4	0.0	-0.1	0.4	1.8
Industrial	12.0	-7.7	-0.3	-0.1	3.8
Total	**13.4**	**-7.7**	**-0.5**	**0.4**	**5.6**

SUPPLY

	Short term ha	Medium term ha	Long term ha	Total ha
Bournemouth	5.0	4.9	6.0	16.0
Christchurch	9.2	0.5	19.6	29.3
East Dorset	0.5	8.4		8.9
North Dorset	23.6	11.1	8.2	42.9
Poole	9.2	22.1	9.7	41.0
Purbeck	[48]	29.7	1.9	31.6
West Dorset	22.6	3.1	2.8	28.5
Weymouth & Portland	4.1	9.1	4.5	17.7
Total	**74.1**	**88.9**	**52.7**	**215.7**

[48] The ELR does not report any short term availability. However, we have been informed that some of the sites at Holton Heath and at Admiralty Park might be available in the short term.

DEMAND AND SUPPLY BALANCE

Bournemouth

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	16.7	19.1	4.3	40.2
Supply	5.0	4.9	6.0	16.0
Balance	**-11.7**	**-14.2**	**1.7**	**-24.2**

Christchurch

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	1.2	0.7	1.8	3.6
Supply	9.2	0.5	19.6	29.3
Balance	**8.0**	**-0.2**	**17.8**	**25.6**

East Dorset

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	17.6	-7.7	11.6	21.5
Supply	0.5	8.4	0.0	8.9
Balance	**-17.1**	**16.2**	**-11.6**	**-12.5**

North Dorset

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	0.4	7.4	17.6	25.3
Supply	23.6	11.1	8.2	42.9
Balance	**23.2**	**3.8**	**-9.4**	**17.5**

Poole

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	11.9	9.1	15.9	36.9
Supply	9.2	22.1	9.7	41.0
Balance	**-2.8**	**13.0**	**-6.1**	**4.1**

Purbeck

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	4.7	3.7	3.1	11.5
Supply	0.0	29.7	1.9	31.6
Balance	**-4.7**	**26.0**	**-1.2**	**20.1**

West Dorset

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	15.6	0.6	23.4	39.6
Supply	22.6	3.1	2.8	28.5
Balance	**6.9**	**2.5**	**-20.6**	**-11.1**

Weymouth & Portland

	2006-2011 ha	2011-2016 ha	2016-2026 ha	2006-2026 ha
Demand	13.4	-7.7	-0.1	5.6
Supply	4.1	9.1	4.5	17.7
Balance	**-9.3**	**16.8**	**4.6**	**12.1**

E – ASSIGNING SECTORS TO LAND USE TYPES

SECTOR TO LAND USE TYPES MATRIX

For the Workspace Strategy the ODPM guidance has been used as a base for assigning sectors to the different land use types. However, based on our extensive experience and knowledge of the different sectors some refinements have been made. The Table below shows on a 4-digit-SIC-code how sectors have been assigned to the different land use types for the Workspace Strategy.

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
0100 : DEFRA/Scottish Executive Agricultural Data				X
0111 : Growing of cereals and other crops not elsewhere classified				X
0112 : Growing of vegetables, horticultural specialities and nursery products				X
0113 : Growing of fruit, nuts, beverage and spice crops				X
0121 : Farming of cattle, dairy farming				X
0122 : Farming of sheep, goats, horses, asses, mules and hinnies				X
0123 : Farming of swine				X
0124 : Farming of poultry				X
0125 : Other farming of animals				X
0130 : Growing of crops combined with farming of animals (mixed farming)				X
0141 : Agricultural service activities	X			
0142 : Animal husbandry service activities, except veterinary activities	X			
0150 : Hunting, trapping and game propagation including related service activities				X
0201 : Forestry and logging				X
0202 : Forestry and logging related service activities	X			
0501 : Fishing				X
0502 : Operation of fish hatcheries and fish farms				X
1010 : Mining and agglomeration of hard coal				X
1020 : Mining and agglomeration of lignite				X
1030 : Extraction and agglomeration of peat				X
1110 : Extraction of crude petroleum and natural gas				X
1120 : Service activities incidental to oil and gas extraction excluding surveying	X			
1200 : Mining of uranium and thorium ores				X
1310 : Mining of iron ores				X
1320 : Mining of non-ferrous metal ores, except uranium and thorium ores				X
1411 : Quarrying of stone for construction				X
1412 : Quarrying of limestone, gypsum and chalk				X
1413 : Quarrying of slate				X
1421 : Operation of gravel and sand pits				X
1422 : Mining of clays and kaolin				X
1430 : Mining of chemicals and fertiliser minerals				X
1440 : Production of salt				X
1450 : Other mining and quarrying not elsewhere classified				X
1511 : Production and preserving of meat		X		
1512 : Production and preserving of poultry meat		X		
1513 : Production of meat and poultry meat products		X		
1520 : Processing and preserving of fish and fish products		X		
1531 : Processing and preserving of potatoes		X		
1532 : Manufacture of fruit and vegetable juice		X		
1533 : Processing and preserving of fruit and vegetables not elsewhere classified		X		
1541 : Manufacture of crude oils and fats		X		
1542 : Manufacture of refined oils and fats		X		
1543 : Manufacture of margarine and similar edible fats		X		
1551 : Operation of dairies and cheese making		X		
1552 : Manufacture of ice cream		X		
1561 : Manufacture of grain mill products		X		
1562 : Manufacture of starches and starch products		X		
1571 : Manufacture of prepared feeds for farm animals		X		
1572 : Manufacture of prepared pet foods		X		
1581 : Manufacture of bread; manufacture of fresh pastry goods and cakes		X		

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
1582 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes		X		
1583 : Manufacture of sugar		X		
1584 : Manufacture of cocoa, chocolate and sugar confectionery		X		
1585 : Manufacture of macaroni, noodles, couscous and similar farinaceous products		X		
1586 : Processing of tea and coffee		X		
1587 : Manufacture of condiments and seasonings		X		
1588 : Manufacture of homogenised food preparations and dietetic food		X		
1589 : Manufacture of other food products not elsewhere classified		X		
1591 : Manufacture of distilled potable alcoholic beverages		X		
1592 : Production of ethyl alcohol from fermented materials		X		
1593 : Manufacture of wines		X		
1594 : Manufacture of cider and other fruit wines		X		
1595 : Manufacture of other non-distilled fermented beverages		X		
1596 : Manufacture of beer		X		
1597 : Manufacture of malt		X		
1598 : Manufacture of mineral waters and soft drinks		X		
1600 : Manufacture of tobacco products		X		
1711 : Preparation and spinning of cotton-type fibres		X		
1712 : Preparation and spinning of woollen-type fibres		X		
1713 : Preparation and spinning of worsted-type fibres		X		
1714 : Preparation and spinning of flax-type fibres		X		
1715 : Throwing and preparation of silk including from noils and throwing and texturing of synthetic or artificial filament yarns		X		
1716 : Manufacture of sewing threads		X		
1717 : Preparation and spinning of other textile fibres		X		
1721 : Cotton-type weaving		X		
1722 : Woollen-type weaving		X		
1723 : Worsted-type weaving		X		
1724 : Silk-type weaving		X		
1725 : Other textile weaving		X		
1730 : Finishing of textiles		X		
1740 : Manufacture of made-up textile articles, except apparel		X		
1751 : Manufacture of carpets and rugs		X		
1752 : Manufacture of cordage, rope, twine and netting		X		
1753 : Manufacture of non-wovens and articles made from non-wovens, except apparel		X		
1754 : Manufacture of other textiles not elsewhere classified		X		
1760 : Manufacture of knitted and crocheted fabrics		X		
1771 : Manufacture of knitted and crocheted hosiery		X		
1772 : Manufacture of knitted and crocheted pullovers, cardigans and similar articles		X		
1810 : Manufacture of leather clothes		X		
1821 : Manufacture of workwear		X		
1822 : Manufacture of other outerwear		X		
1823 : Manufacture of underwear		X		
1824 : Manufacture of other wearing apparel and accessories not elsewhere classified		X		
1830 : Dressing and dyeing of fur; manufacture of articles of fur		X		
1910 : Tanning and dressing of leather		X		
1920 : Manufacture of luggage, handbags and the like, saddlery and harness		X		
1930 : Manufacture of footwear		X		
2010 : Saw milling and planing of wood, impregnation of wood		X		
2020 : Manufacture of veneer sheets; manufacture of plywood, laminboard, particle board, fibre board and other panels and boards		X		
2030 : Manufacture of builders carpentry and joinery		X		
2040 : Manufacture of wooden containers		X		
2051 : Manufacture of other products of wood		X		
2052 : Manufacture of articles of cork, straw and plaiting materials		X		
2111 : Manufacture of pulp		X		
2112 : Manufacture of paper and paperboard		X		
2121 : Manufacture of corrugated paper and paperboard and of containers of paper and paperboard		X		
2122 : Manufacture of household and sanitary goods and of toilet requisites		X		
2123 : Manufacture of paper stationery		X		
2124 : Manufacture of wallpaper		X		
2125 : Manufacture of other articles of paper and paperboard not elsewhere classified		X		
2211 : Publishing of books	X			
2212 : Publishing of newspapers	X			
2213 : Publishing of journals and periodicals	X			
2214 : Publishing of sound recordings	X			
2215 : Other publishing	X			

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
2221 : Printing of newspapers		X		
2222 : Printing not elsewhere classified		X		
2223 : Bookbinding		X		
2224 : Pre-press activities		X		
2225 : Ancillary operations related to printing		X		
2231 : Reproduction of sound recording		X		
2232 : Reproduction of video recording		X		
2233 : Reproduction of computer media		X		
2310 : Manufacture of coke oven products		X		
2320 : Manufacture of refined petroleum products		X		
2330 : Processing of nuclear fuel		X		
2411 : Manufacture of industrial gases		X		
2412 : Manufacture of dyes and pigments		X		
2413 : Manufacture of other inorganic basic chemicals		X		
2414 : Manufacture of other organic chemicals		X		
2415 : Manufacture of fertilisers and nitrogen compounds		X		
2416 : Manufacture of plastics in primary forms		X		
2417 : Manufacture of synthetic rubber in primary forms		X		
2420 : Manufacture of pesticides and other agro-chemical products		X		
2430 : Manufacture of paints, varnishes and similar coatings, printing ink and mastics		X		
2441 : Manufacture of basic pharmaceuticals		X		
2442 : Manufacture of pharmaceutical preparations		X		
2451 : Manufacture of soap and detergents, cleaning and polishing preparations		X		
2452 : Manufacture of perfumes and toilet preparations		X		
2461 : Manufacture of explosives		X		
2462 : Manufacture of glues and gelatine		X		
2463 : Manufacture of essential oils		X		
2464 : Manufacture photographic chemical material		X		
2465 : Manufacture of prepared unrecorded media		X		
2466 : Manufacture of other chemical products not elsewhere classified		X		
2470 : Manufacture of man-made fibres		X		
2511 : Manufacture of rubber tyres and tubes		X		
2512 : Retreading and rebuilding of rubber tyres		X		
2513 : Manufacture of other rubber products		X		
2521 : Manufacture of plastic plates, sheets, tubes and profiles		X		
2522 : Manufacture of plastic packing goods		X		
2523 : Manufacture of builders ware of plastic		X		
2524 : Manufacture of other plastic products		X		
2611 : Manufacture of flat glass		X		
2612 : Shaping and processing of flat glass		X		
2613 : Manufacture of hollow glass		X		
2614 : Manufacture of glass fibres		X		
2615 : Manufacture and processing of other glass including technical glassware		X		
2621 : Manufacture of ceramic household and ornamental articles		X		
2622 : Manufacture of ceramic sanitary fixtures		X		
2623 : Manufacture of ceramic insulators and insulating fittings		X		
2624 : Manufacture of other technical ceramic products		X		
2625 : Manufacture of other ceramic products		X		
2626 : Manufacture of refractory ceramic products		X		
2630 : Manufacture of ceramic tiles and flags		X		
2640 : Manufacture of bricks, tiles and construction products, in baked clay		X		
2651 : Manufacture of cement		X		
2652 : Manufacture of lime		X		
2653 : Manufacture of plaster		X		
2661 : Manufacture of concrete products for construction purposes		X		
2662 : Manufacture of plaster products for construction purposes		X		
2663 : Manufacture of ready-mixed concrete		X		
2664 : Manufacture of mortars		X		
2665 : Manufacture of fibre cement		X		
2666 : Manufacture of other articles of concrete, plaster and cement		X		
2670 : Cutting, shaping and finishing of stone		X		
2681 : Production of abrasive products		X		
2682 : Manufacture of other non-metallic mineral products not elsewhere classified		X		
2710 : Manufacture of basic iron and steel and of ferro-alloys		X		
2721 : Manufacture of cast iron tubes		X		
2722 : Manufacture of steel tubes		X		
2731 : Cold drawing		X		

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
2732 : Cold rolling of narrow strip		X		
2733 : Cold forming or folding		X		
2734 : Wire drawing		X		
2741 : Precious metals production		X		
2742 : Aluminium production		X		
2743 : Lead, zinc and tin production		X		
2744 : Copper production		X		
2745 : Other non-ferrous metal production		X		
2751 : Casting of iron		X		
2752 : Casting of steel		X		
2753 : Casting of light metals		X		
2754 : Casting of other non-ferrous metals		X		
2811 : Manufacture of metal structures and parts of structures		X		
2812 : Manufacture of builders' carpentry and joinery of metal		X		
2821 : Manufacture of tanks, reservoirs and containers of metal		X		
2822 : Manufacture of central heating radiators and boilers		X		
2830 : Manufacture of steam generators, except central heating hot water boilers		X		
2840 : Forging, pressing, stamping and roll forming of metal; powder metallurgy		X		
2851 : Treatment and coating of metals		X		
2852 : General mechanical engineering		X		
2861 : Manufacture of cutlery		X		
2862 : Manufacture of tools		X		
2863 : Manufacture of locks and hinges		X		
2871 : Manufacture of steel drums and similar containers		X		
2872 : Manufacture of light metal packaging		X		
2873 : Manufacture of wire products		X		
2874 : Manufacture of fasteners, screw machine products, chains and springs		X		
2875 : Manufacture of other fabricated metal products not elsewhere classified		X		
2911 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines		X		
2912 : Manufacture of pumps and compressors		X		
2913 : Manufacture of taps and valves		X		
2914 : Manufacture of bearings, gears, gearing and driving elements		X		
2921 : Manufacture of furnaces and furnace burners		X		
2922 : Manufacture of lifting and handling equipment		X		
2923 : Manufacture of non-domestic cooling and ventilation equipment		X		
2924 : Manufacture of other general purpose machinery not elsewhere classified		X		
2931 : Manufacture of agricultural tractors		X		
2932 : Manufacture of other agricultural and forestry machinery		X		
2941 : Manufacture of portable hand held power tools		X		
2942 : Manufacture of metalworking machine tools		X		
2943 : Manufacture of other machine tools not elsewhere classified		X		
2951 : Manufacture of machinery for metallurgy		X		
2952 : Manufacture of machinery for mining, quarrying and construction		X		
2953 : Manufacture of machinery for food, beverage and tobacco processing		X		
2954 : Manufacture of machinery for textile, apparel and leather production		X		
2955 : Manufacture of machinery for paper and paperboard production		X		
2956 : Manufacture of other special purpose machinery not elsewhere classified		X		
2960 : Manufacture of weapons and ammunition		X		
2971 : Manufacture of electric domestic appliances		X		
2972 : Manufacture of non-electric domestic appliances		X		
3001 : Manufacture of office machinery		X		
3002 : Manufacture of computers and other information processing equipment		X		
3110 : Manufacture of electric motors, generators and transformers		X		
3120 : Manufacture of electricity distribution and control apparatus		X		
3130 : Manufacture of insulated wire and cable		X		
3140 : Manufacture of accumulators, primary cells and primary batteries		X		
3150 : Manufacture of lighting equipment and electric lamps		X		
3161 : Manufacture of electrical equipment for engines and vehicles not elsewhere classified		X		
3162 : Manufacture of other electrical equipment not elsewhere classified		X		
3210 : Manufacture of electronic valves and tubes and other electronic components		X		
3220 : Manufacture of television and radio transmitters and apparatus for line telephony and line telegraphy		X		
3230 : Manufacture of television and radio receivers, sound or video recording or reproducing apparatus and associated goods		X		
3310 : Manufacture of medical and surgical equipment and orthopaedic appliances		X		
3320 : Manufacture of instruments and appliances for measuring, checking, testing, navigating and other purposes, except industrial process control equipment		X		
3330 : Manufacture of industrial process control equipment		X		

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
3340 : Manufacture of optical instruments and photographic equipment		X		
3350 : Manufacture of watches and clocks		X		
3410 : Manufacture of motor vehicles		X		
3420 : Manufacture of bodies (coachwork) for motor vehicles: manufacture of trailers and semi-trailers		X		
3430 : Manufacture of parts and accessories for motor vehicles and their engines		X		
3511 : Building and repairing of ships		X		
3512 : Building and repairing of pleasure and sporting boats		X		
3520 : Manufacture of railway and tramway locomotives and rolling stock		X		
3530 : Manufacture of aircraft and spacecraft		X		
3541 : Manufacture of motorcycles		X		
3542 : Manufacture of bicycles		X		
3543 : Manufacture of invalid carriages		X		
3550 : Manufacture of other transport equipment not elsewhere classified		X		
3611 : Manufacture of chairs and seats		X		
3612 : Manufacture of other office and shop furniture		X		
3613 : Manufacture of other kitchen furniture		X		
3614 : Manufacture of other furniture		X		
3615 : Manufacture of mattresses		X		
3621 : Striking of coins and medals		X		
3622 : Manufacture of jewellery and related articles not elsewhere classified		X		
3630 : Manufacture of musical instruments		X		
3640 : Manufacture of sports goods		X		
3650 : Manufacture of games and toys		X		
3661 : Manufacture of imitation jewellery		X		
3662 : Manufacture of brooms and brushes		X		
3663 : Other manufacturing not elsewhere classified		X		
3710 : Recycling of metal waste and scrap		X		
3720 : Recycling of non-metal waste and scrap		X		
4011 : Production of electricity				X
4012 : Transmission of electricity				X
4013 : Distribution and trade in electricity	X			
4021 : Manufacture of gas		X		
4022 : Distribution of gaseous fuels through mains				X
4030 : Steam and hot water supply				X
4100 : Collection, purification and distribution of water				X
4511 : Demolition and wrecking of buildings; earth moving				X
4512 : Test drilling and boring				X
4521 : General construction of buildings and civil engineering works				X
4522 : Erection of roof covering and frames				X
4523 : Construction of highways, roads, airfields and sports facilities				X
4524 : Construction of water projects				X
4525 : Other construction work involving special trades		X		
4531 : Installation of electrical wiring and fittings		X		
4532 : Insulation work activities		X		
4533 : Plumbing		X		
4534 : Other building installation		X		
4541 : Plastering		X		
4542 : Joinery installation		X		
4543 : Floor or wall covering		X		
4544 : Painting and glazing		X		
4545 : Other building completion		X		
4550 : Renting of construction or demolition equipment with operator		X		
5010 : Sale of motor vehicles				X
5020 : Maintenance and repair of motor vehicles				X
5030 : Sale of motor vehicle parts and accessories				X
5040 : Sale, maintenance and repair of motorcycles and related parts and accessories				X
5050 : Retail sale of automotive fuel				X
5111 : Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods	X			
5112 : Agents involved in the sale of fuels, ores, metals and industrial chemicals	X			
5113 : Agents involved in the sale of timber and building materials	X			
5114 : Agents involved in the sale of machinery, industrial equipment, ships and aircraft	X			
5115 : Agents involved in the sale of furniture, household goods, hardware and ironmongery	X			
5116 : Agents involved in the sale of textiles, clothing, footwear and leather goods	X			
5117 : Agents involved in the sale of food, beverages and tobacco	X			
5118 : Agents specialising in the sale of particular products or ranges of products not elsewhere classified	X			

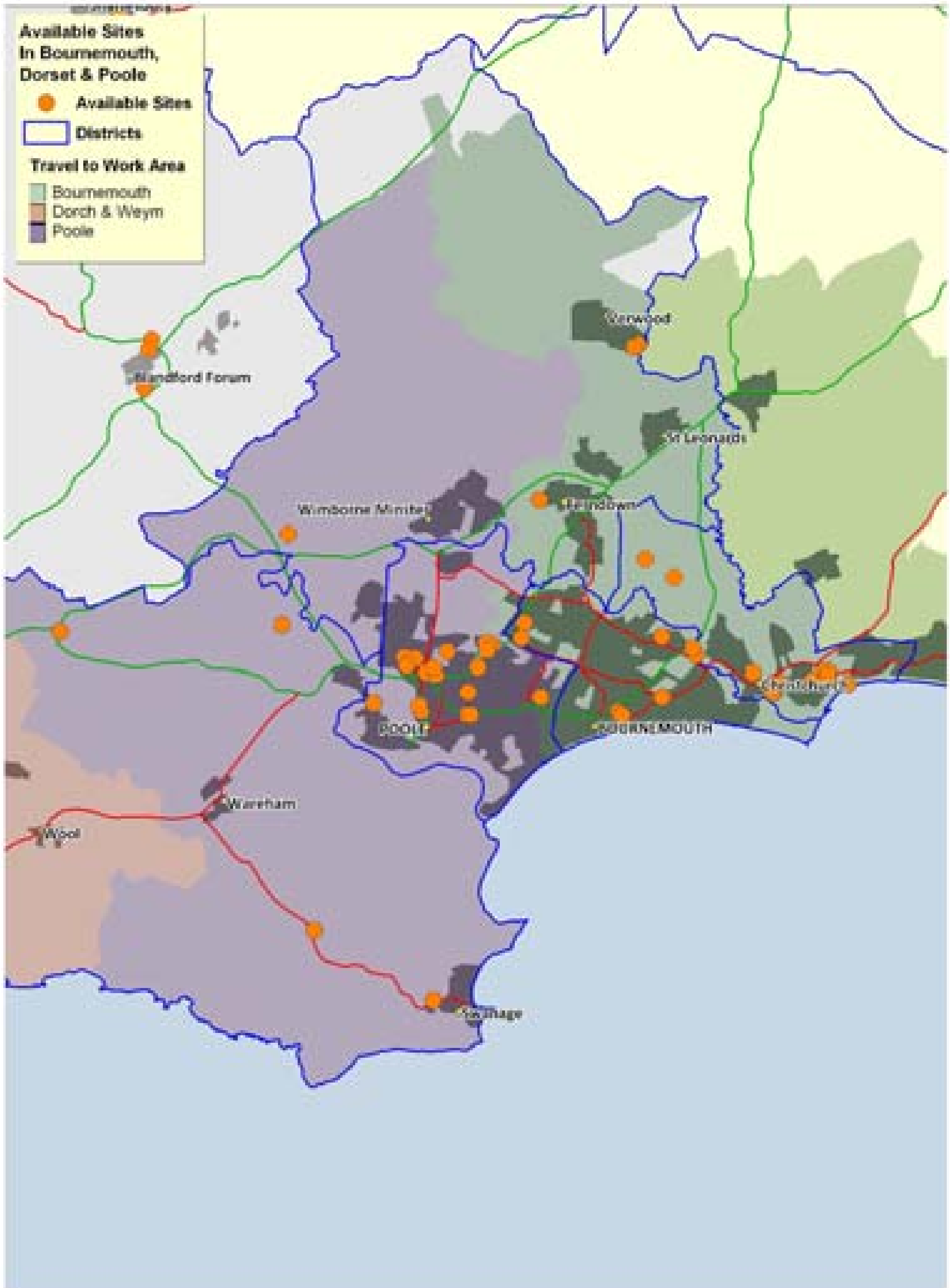
Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
5119 : Agents involved in the sale of a variety of goods	X			
5121 : Wholesale of grain, seeds and animal foods			X	
5122 : Wholesale of flowers and plants			X	
5123 : Wholesale of live animals			X	
5124 : Wholesale of hides, skins and leather			X	
5125 : Wholesale of unmanufactured tobacco			X	
5131 : Wholesale of fruit and vegetables			X	
5132 : Wholesale of meat and meat products			X	
5133 : Wholesale of dairy produce, eggs and edible oils and fats			X	
5134 : Wholesale of alcoholic and other beverages			X	
5135 : Wholesale of tobacco products			X	
5136 : Wholesale of sugar and chocolate and sugar confectionery			X	
5137 : Wholesale of coffee, tea, cocoa and spices			X	
5138 : Wholesale of other food including fish, crustaceans and molluscs			X	
5139 : Non-specialised wholesale of food, beverages and tobacco			X	
5141 : Wholesale of textiles			X	
5142 : Wholesale of clothing and footwear			X	
5143 : Wholesale of electrical household appliances and radio and television goods			X	
5144 : Wholesale of china and glassware, wallpaper and cleaning materials			X	
5145 : Wholesale of perfume and cosmetics			X	
5146 : Wholesale of pharmaceutical goods			X	
5147 : Wholesale of other household goods			X	
5151 : Wholesale of solid, liquid and gaseous fuels and related products			X	
5152 : Wholesale of metals and ores			X	
5153 : Wholesale of wood, construction materials and sanitary equipment			X	
5154 : Wholesale of hardware, plumbing and heating equipment and supplies			X	
5155 : Wholesale of chemical products			X	
5156 : Wholesale of other intermediate products			X	
5157 : Wholesale of waste and scrap			X	
5181 : Wholesale of machine tools			X	
5182 : Wholesale of mining, construction and civil engineering machinery			X	
5183 : Wholesale of machinery for the textile industry, and of sewing and knitting machines			X	
5184 : Wholesale of computers, computer peripheral equipment and software			X	
5185 : Wholesale of other office machinery and equipment			X	
5186 : Wholesale of other electronic parts and equipment			X	
5187 : Wholesale of other machinery for use in industry, trade and navigation			X	
5188 : Wholesale of agricultural machinery and accessories and implements, including tractors			X	
5190 : Other wholesale			X	
5211 : Retail sale in non-specialised stores with food, beverages or tobacco predominating				X
5212 : Other retail sale in non-specialised stores				X
5221 : Retail sale of fruit and vegetables				X
5222 : Retail sale of meat and meat products				X
5223 : Retail sale of fish, crustaceans and molluscs				X
5224 : Retail sale of bread, cakes, flour confectionery and sugar confectionery				X
5225 : Retail sale of alcoholic and other beverages				X
5226 : Retail sale of tobacco products				X
5227 : Other retail sale of food, beverages and tobacco in specialised stores				X
5231 : Dispensing chemists				X
5232 : Retail sale of medical and orthopaedic goods				X
5233 : Retail sale of cosmetic and toilet articles				X
5241 : Retail sale of textiles				X
5242 : Retail sale of clothing				X
5243 : Retail sale of footwear and leather goods				X
5244 : Retail sale of furniture, lighting equipment and household articles not elsewhere classified				X
5245 : Retail sale of electrical household appliances and radio and television goods				X
5246 : Retail sale of hardware, paints and glass				X
5247 : Retail sale of books, newspapers and stationery				X
5248 : Other retail sale in specialised stores				X
5250 : Retail sale of second-hand goods in stores				X
5261 : Retail sale via mail order house				X
5262 : Retail sale via stalls and markets				X
5263 : Other non-store retail sale				X
5271 : Repair of boots, shoes and other articles of leather				X
5272 : Repair of electrical household goods				X
5273 : Repair of watches, clocks and jewellery				X
5274 : Repair not elsewhere classified				X

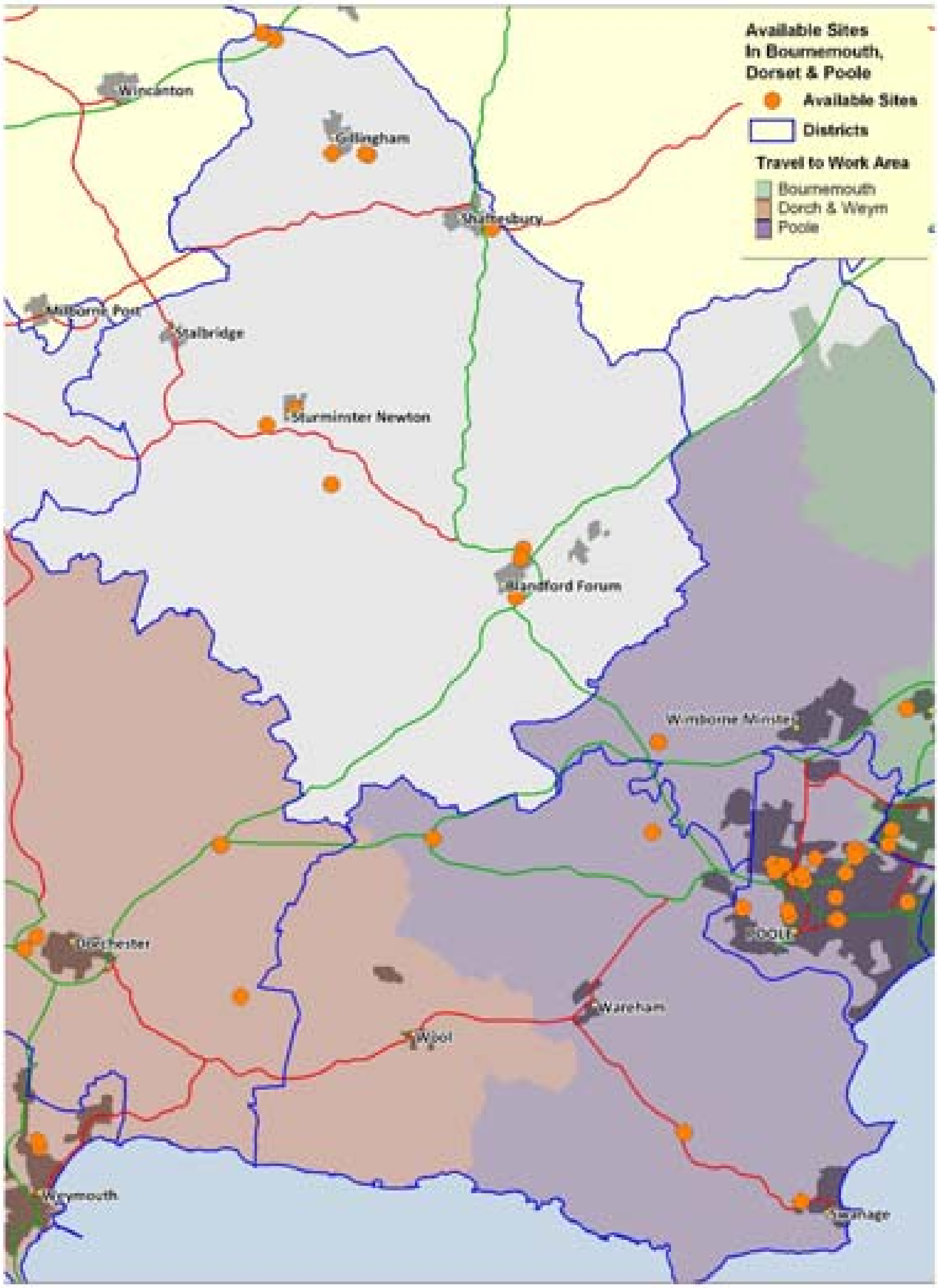
Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
5510 : Hotels				X
5521 : Youth hostels and mountain refuges				X
5522 : Camping sites, including caravan sites				X
5523 : Other provision of lodgings not elsewhere classified				X
5530 : Restaurants				X
5540 : Bars				X
5551 : Canteens				X
5552 : Catering				X
6010 : Transport via railways				X
6021 : Other scheduled passenger land transport				X
6022 : Taxi operation				X
6023 : Other passenger land transport				X
6024 : Freight transport by road				X
6030 : Transport via pipelines				X
6110 : Sea and coastal water transport				X
6120 : Inland water transport				X
6210 : Scheduled air transport				X
6220 : Non-scheduled air transport				X
6230 : Space transport				X
6311 : Cargo handling			X	
6312 : Storage and warehousing			X	
6321 : Other supporting land transport activities				X
6322 : Other supporting water transport activities				X
6323 : Other supporting air transport activities				X
6330 : Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified				X
6340 : Activities of other transport agencies	X			
6411 : National post activities			X	
6412 : Courier activities other than national post activities			X	
6420 : Telecommunications	X			
6511 : Central banking	X			
6512 : Other monetary intermediation	X			
6521 : Financial leasing	X			
6522 : Other credit granting	X			
6523 : Other financial intermediation not elsewhere classified	X			
6601 : Life insurance	X			
6602 : Pension funding	X			
6603 : Non-life insurance	X			
6711 : Administration of financial markets	X			
6712 : Security broking and fund management	X			
6713 : Activities auxiliary to financial intermediation not elsewhere classified	X			
6720 : Activities auxiliary to insurance and pension funding	X			
7011 : Development and selling of real estate	X			
7012 : Buying and selling of own real estate	X			
7020 : Letting of own property	X			
7031 : Real estate agencies	X			
7032 : Management of real estate on a fee or contract basis	X			
7110 : Renting of automobiles		X		
7121 : Renting of other land transport equipment		X		
7122 : Renting of water transport equipment		X		
7123 : Renting of air transport equipment		X		
7131 : Renting of agricultural machinery and equipment		X		
7132 : Renting of construction and civil engineering machinery and equipment		X		
7133 : Renting of office machinery and equipment including computers	X			
7134 : Renting of other machinery and equipment not elsewhere classified		X		
7140 : Renting of personal and household goods not elsewhere classified		X		
7210 : Hardware consultancy	X			
7221 : Publishing of software	X			
7222 : Other software consultancy and supply	X			
7230 : Data processing	X			
7240 : Data base activities	X			
7250 : Maintenance and repair of office, accounting and computing machinery	X			
7260 : Other computer related activities	X			
7310 : Research and experimental development on natural sciences and engineering	X			
7320 : Research and experimental development on social sciences and humanities	X			
7411 : Legal activities	X			
7412 : Accounting, book-keeping and auditing activities; tax consultancy	X			

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
7413 : Market research and public opinion polling	X			
7414 : Business and management consultancy activities	X			
7415 : Management activities of holding companies	X			
7420 : Architectural and engineering activities and related technical consultancy	X			
7430 : Technical testing and analysis		X		
7440 : Advertising	X			
7450 : Labour recruitment and provision of personnel	X			
7460 : Investigation and security activities	X			
7470 : Industrial cleaning		X		
7481 : Photographic activities	X			
7482 : Packaging activities		X		
7485 : Secretarial and translation services	X			
7486 : Call centre activities	X			
7487 : Other business activities not elsewhere classified	X			
7511 : General (overall) public service activities	X			
7512 : Regulation of the activities of agencies that provide health care, education, cultural services and other social services excluding social security	X			
7513 : Regulation of and contribution to more efficient operation of business	X			
7514 : Supporting service activities for the government as a whole	X			
7521 : Foreign affairs	X			
7522 : Defence activities	X			
7523 : Justice and judicial activities	X			
7524 : Public security, law and order activities	X			
7525 : Fire service activities				X
7530 : Compulsory social security activities	X			
8010 : Primary education				X
8021 : General secondary education				X
8022 : Technical and vocational secondary education				X
8030 : Higher education				X
8041 : Driving school activities				X
8042 : Adult and other education not elsewhere classified				X
8511 : Hospital activities				X
8512 : Medical practice activities				X
8513 : Dental practice activities				X
8514 : Other human health activities				X
8520 : Veterinary activities				X
8531 : Social work activities with accommodation				X
8532 : Social work activities without accommodation	X			
9001 : Collection and treatment of sewage				X
9002 : Collection and treatment of other waste				X
9003 : Sanitation, remediation and similar activities				X
9111 : Activities of business and employers organisations	X			
9112 : Activities of professional organisations	X			
9120 : Activities of trade unions	X			
9131 : Activities of religious organisations	X			
9132 : Activities of political organisations	X			
9133 : Activities of other membership organisations not elsewhere classified	X			
9211 : Motion picture and video production	X			
9212 : Motion picture and video distribution	X			
9213 : Motion picture projection				X
9220 : Radio and television activities	X			
9231 : Artistic and literary creation and interpretation	X			
9232 : Operation of arts facilities				X
9233 : Fair and amusement park activities				X
9234 : Other entertainment activities not elsewhere classified				X
9240 : News agency activities	X			
9251 : Library and archive activities				X
9252 : Museum activities and preservation of historical sites and buildings				X
9253 : Botanical and zoological gardens and nature reserve activities				X
9261 : Operation of sports arenas and stadiums				X
9262 : Other sporting activities				X
9271 : Gambling and betting activities				X
9272 : Other recreational activities not elsewhere classified				X
9301 : Washing and dry cleaning of textile and fur products				X
9302 : Hairdressing and other beauty treatment				X
9303 : Funeral and related activities				X
9304 : Physical well-being activities				X

Industry	Land Use Types			
	Office (B1a)	Other Business Space (B1b/c, B2)	Warehouse (B8)	Non-B-Class
9305 : Other service activities not elsewhere classified				X
9500 : Private households with employed persons				X
9600 : Undifferentiated goods producing activities of private households for own use				X
9700 : Undifferentiated services producing activities of private households for own use				X
9900 : Extra-territorial organisations and bodies	X			

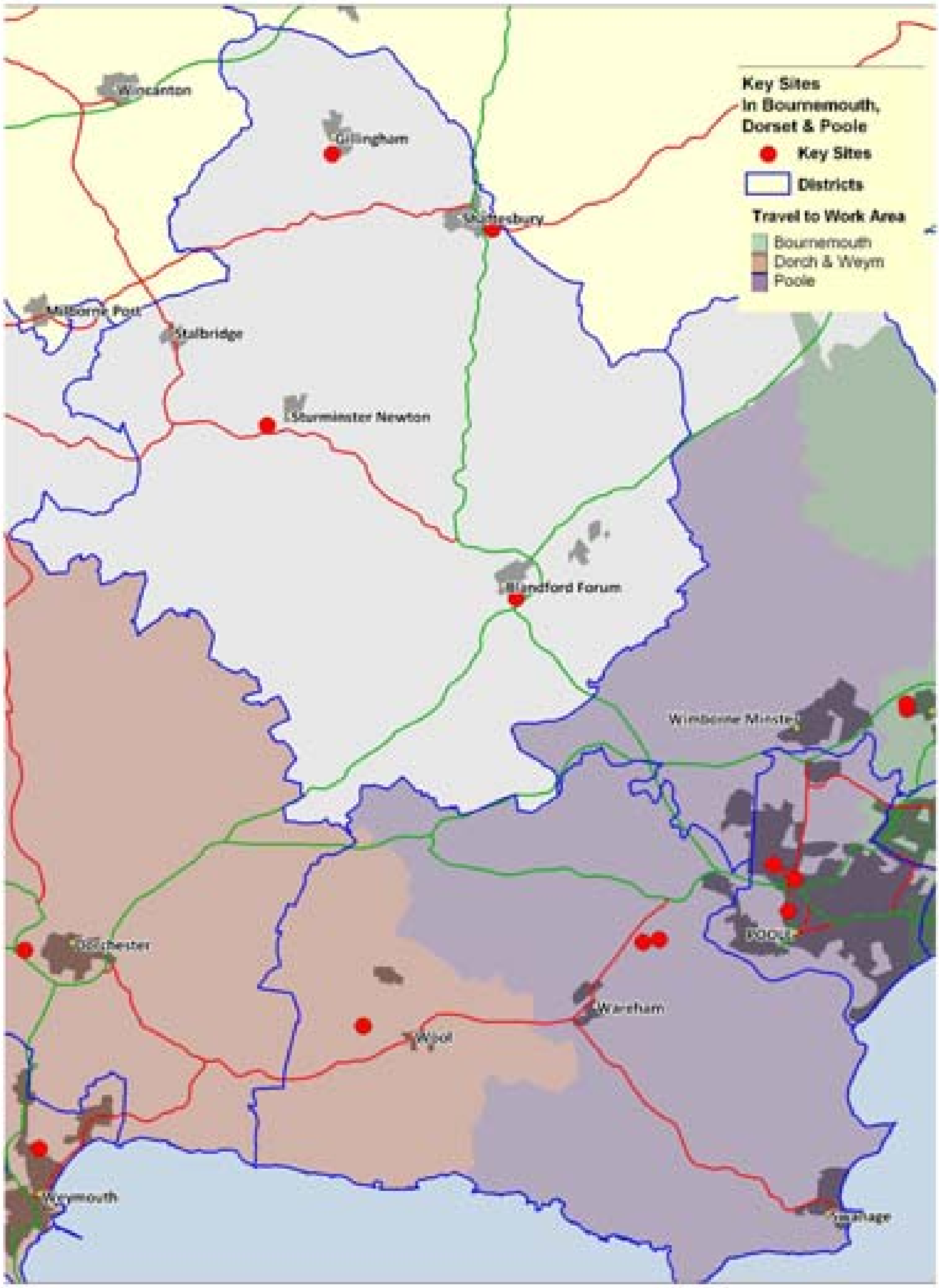
F – MAPS OF AVAILABLE SITES




Available Sites
In Bournemouth,
Dorset & Poole
Available Sites
Districts
Travel to Work Area
Bournemouth
Dorch & Weym
Poole
Wincanton
Gillingham
Shaftesbury
Milborne Port
Stalbridge
Sturminster Newton
Blandford Forum
Wimborne Minster
Dorchester
Wool
Wareham
POOLE
Weymouth
Swanage


Available Sites
In Bournemouth,
Dorset & Poole
Available Sites
Districts
Travel to Work Area
Bournemouth
Dorch & Weym
Poole
South Petherton
Sherborne
Crewkerne
Beaminster
Bridport
Lyme Regis
Dorchester
Weymouth

G – MAPS OF KEY SITES


Key Sites
In Bournemouth,
Dorset & Poole
Key Sites
Districts
Travel to Work Area
Bournemouth
Dorch & Weym
Poole
Wincanton
Gillingham
Shaftesbury
Milborne Port
Stalbridge
Sturminster Newton
Blandford Forum
Wimborne Minster
Dorchester
Wool
Wareham
POOLE
Weymouth


Key Sites
In Bournemouth,
Dorset & Poole
Key Sites
Districts
Travel to Work Area
Bournemouth
Dorch & Weym
Poole
South Petherton
Crewkerne
Sherborne
Beaminster
Bridport
Lyme Regis
Dorchester
Weymouth