ROGER TYM & PARTNERS
Planners and Development Economists
Part of Peter Brett Associates LLP

Roger Tym & Partners
7 Soho Square
London W1D 3QB

t: 020 7028 7100
e: london@tymconsult.com
w: www.tymconsult.com

North Northamptonshire Employment Targets

Final Report

Final Report | November 2011

25538

CONTENTS

APPENDICES

1 NORTH NORTHAMPTONSHIRE EMPLOYMENT TARGETS

Target Objectives

1.1 The North Northamptonshire Core Spatial Strategy (CSS) was adopted in June 2008. This sets out a requirement for 52,100 homes and 47,400 jobs in the period to 2021. The CSS is currently being reviewed to take into account various factors, notably the economic recession.

1.2 The North Northamptonshire JPU have prepared a background paper that sets various spatial options for jobs and housing growth across the four districts of Corby, East Northamptonshire, Kettering and Wellingborough. The paper derives 'jobs targets' based on labour supply projections. Three alternative levels of jobs targets are set out:

- 18,700 – based on maintaining the existing ratio of jobs: workers in North Northants
- 24,800 – which is equivalent to the increase in projected labour supply
- 33,400 – which is based on reduction in net out-commuting

1.3 A labour supply derived target is a valid mechanism for deriving a planning target for jobs, but it does rely on a number of assumptions that can be open to challenge.

1.4 In this paper we examine the assumptions and data that underpin the jobs targets figures. We then go on to assess these targets against plausible levels of sectoral demand.

Opening Equilibrium

1.5 Using change in jobs and workers avoids the difficulty of trying to construct a labour market balance sheet over time using different data sets that are not exactly comparable and hence will not balance. For example jobs estimates from Census data will be different to those using workplace jobs estimates based on ABI data.

1.6 But it is important to take into account the equilibrium state at the starting point of the analysis. If you are trying to move jobs and workers in line from a given starting point it assumes your staring point is one of appropriate equilibrium. Otherwise there is excess supply or demand at this point which must be factored into any subsequent calculations to achieve your target e.g. this is reflected in the continued and current levels of out-commuting which have been identified as a major issues affecting North Northamptonshire. At 2011 we assume the situation is probably one of excess supply of labour. Hence an adjustment to reduce unemployment rates and raise activity rates will probably need to be factored in.

Labour Supply Projections

1.7 As labour supply (i.e. economically active/potentially economically active population) is the basis for the jobs targets we first examine the method, data and assumptions that produced these projections.

1.8 Edge Analytics prepared a series of population and household forecasts for North Northants JPU under different scenarios. These consisted of three alternative migration assumptions and five alternative dwelling led scenarios. The results are summarised in the table below. The dwellings-led projections and the Migration-led Recalibration scenario all generate very similar outcomes.

Table 1.1 Summary Population and Labour Force Projections North Northamptonshire

	Population				Labour Force		
	2001	2011	2031	2011-31	2011	2031	2011-31
A1 Northern Focus	285,093	310,608	385,448	74,840	165,015	189,837	24,822
A2 Northern Focus	285,093	310,659	394,114	83,455	165,047	194,775	29,728
Core Strategy	285,093	310,608	385,425	74,817	165,013	189,897	24,884
Northampton Focus	285,093	310,607	385,220	74,613	165,014	189,893	24,879
Twin Poles	285,093	310,608	385,289	74,681	165,013	189,866	24,853
Migration-Led	285,093	311,230	362,563	51,333	165,387	176,870	11,483
Natural Change	285,093	308,190	327,098	18,908	163,501	156,367	-7,134
Migration-Led Recalibrated	285,093	319,606	394,819	75,213	170,815	195,348	24,533

1.9 In the projections economic activity rates have been held constant. (We discuss this further below). But the effects of an aging population is to reduce the proportion of workers to population in each scenario. In other words the dependency rate will go up.

Table 1.2 Labour Force to Population Ratio

	2011	2031
A1 Northern Focus	53.1%	49.3%
A2 Northern Focus	53.1%	49.4%
Core Strategy	53.1%	49.3%
Northampton Focus	53.1%	49.3%
Twin Poles	53.1%	49.3%
Migration-Led	53.1%	48.8%
Natural Change	53.1%	47.8%
Migration-Led Recalibrated	53.4%	49.5%

Employment Growth and Targets

1.10 In analysing past employment growth it is more useful to split the data into two time periods, from 1998-2008 and 2008-2010. This is for a combination of both cyclical and data reasons. 1998-2008 enables a consistent data series using Annual Business Inquiry (ABI)[1] data and approximates to a peak to peak period (i.e. a long period of economic growth) which is better for analysing change and should give a more reliable picture of long run trends. The latter period 2008-10 enables consideration of the impact of the recession but also uses a revised data series known as the Business Register and Employment Survey.

[1] Annual Business Inquiry

1.11 Employment[2] over the period 1998-2008 grew at an average of 1.0% p.a. for North Northamptonshire as a whole, resulting in an increase of 12,000 jobs. At first view a past increase of 12,000 jobs over a ten year period would appear consistent with a projected target of 24,000 over a twenty-year period, arising from the projected increase in labour supply.

1.12 But there are two important caveats to this. Firstly the period 1998-2008 was a period of above average employment growth. The plan period 2011-31 is post-recession and should not be unduly influenced by cyclical factors, but it is not generally expected that employment growth will return to the same high levels as experienced in the previous pre-recessionary cycle. This point is further reinforced given that much of the growth over that period was driven by increase in health and education employment. Although relatively protected in the latest Spending Review such sectors are unlikely to experience the same growth rate in the future.

1.13 The second point to take account of is the differential performance of different parts of North Northamptonshire. Whilst Kettering and East Northamptonshire have achieved very high levels of employment growth, Corby and Wellingborough saw a reduction in employment over this period. And as highlighted above, this was during a period of strong employment growth nationally. Spatial options for growth will need to consider this differential performance.

Table 1.3 Net Employment Growth 1998-2008

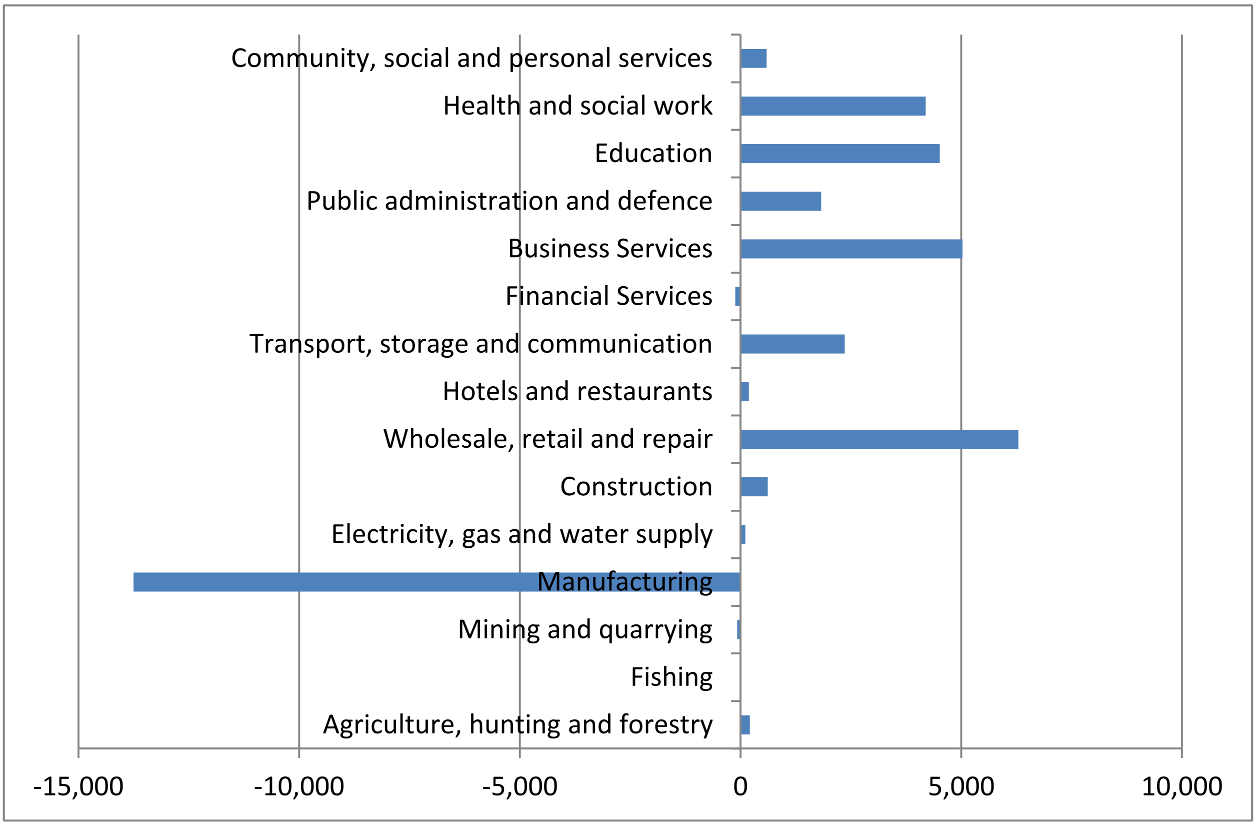
	Number	%
Corby	-286	-1.0%
East Northamptonshire	7,467	37.8%
Kettering	6,202	20.3%
Wellingborough	-1,371	-4.1%
North Northants	12,012	10.6%

1.14 Past employment growth has come across a range of distribution and service sectors. The largely public sector categories of public administration, health and education grew by 10,500 jobs in total.

1.15 Growth in these service sectors has been offset to some extent by reductions in manufacturing employment which fell by a third over the period 1998-2008, losing 13,750 jobs.

[2] This definition is for employees in employment and excludes any change in the levels of self-employment.

Figure 1.1 Employment Change by Sector North Northants 1998-2008



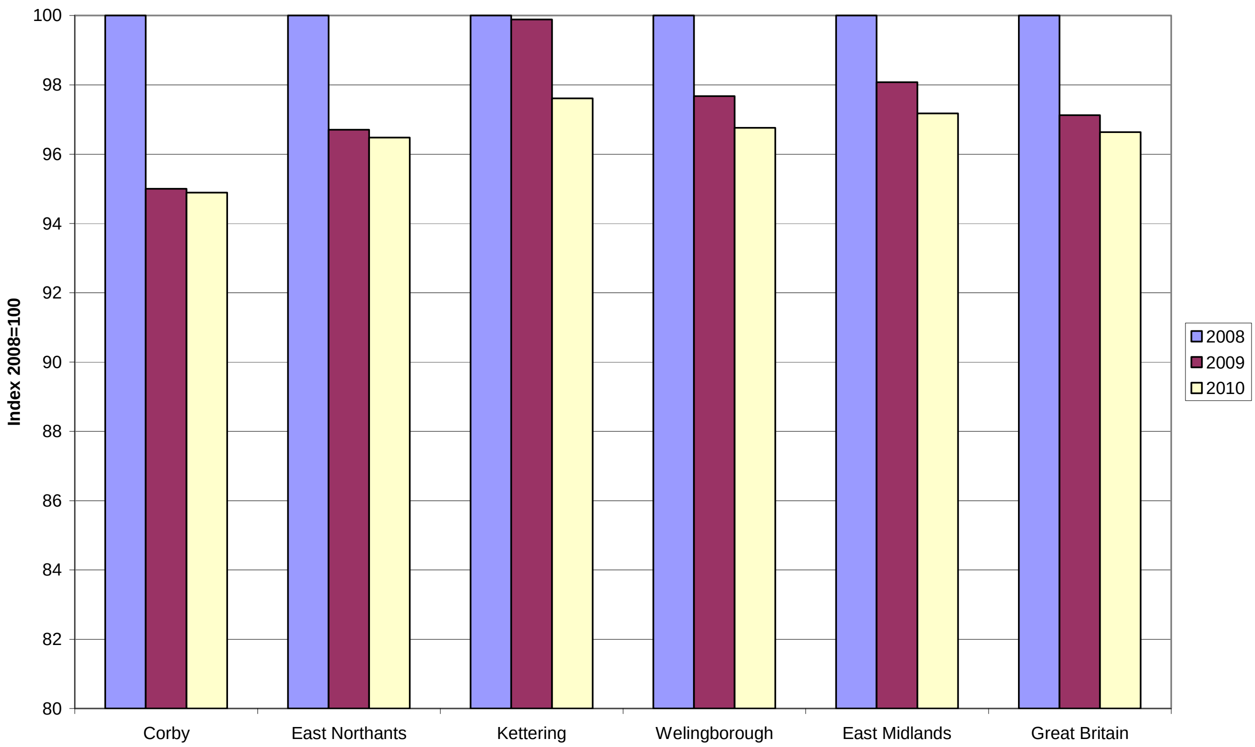
1.16 North Northamptonshire has experienced a similar loss of employment during the recession to that which has occurred nationally.

1.17 However Corby has been especially hard hit by the recession due to the loss of manufacturing employment. The Corby local economy was (and remains) more dependent on manufacturing then the rest of the area. So Corby is much more vulnerable to the national decline in manufacturing employment.

1.18 Employment has held up better in Kettering through continued expansion of the health sector. Details of employment change by sector for the period 2008-10 is set out in Appendix 2 and figure 1.2 illustrates this.

1.19 For the Core Strategy in North Northamptonshire one important feature to note is that any decline in employment will either be in existing businesses; who now use their space less efficiently. Or where businesses have closed they may have released sites for re-occupation or redevelopment. New space to replace those jobs lost is not always necessary. An update of the ELRs should be able to determine whether this is the case.

Figure 1.2 Employment Change 2008-10



Source: BRES

2 IMPLICATIONS FOR THE SPATIAL OPTIONS

2.1 The analysis above presents a view regarding the performance of North Northamptonshire as a local economy. However planners need to direct growth to the constituent parts of the area; identifying those locations best placed to meet of the wider North Northamptonshire economic and sustainability objectives.

2.2 Before commenting in detail it is worth examining the comparative past performance of the North Northamptonshire districts. In particular the relationship between gross job gains / losses and the impact this has had on net job change. This is so we can identify those parts of North Northamptonshire with the greatest potential to deliver jobs in the challenging economic climate, or understand why some parts of North Northamptonshire have failed to deliver new jobs.

2.3 As noted above over 10 years North Northamptonshire gained 12,000 jobs (1998 – 2008). However between the local authorities 'headline' performance is mixed.

2.4 From a cursory glance East Northamptonshire has been a true success story; growing employment by nearly 38% over the period. Kettering has also shown strong growth (20%) while Corby and Wellingborough have showed small declines in total employment.

2.5 Below we first look at the last set of North Northamptonshire Employment Land Studies (ELSs) and then in more detail at some of the key growth sectors.

Employment Land Studies North Northamptonshire

2.6 The employment land studies for Wellingborough, Kettering, Corby and East Northamptonshire are dated and their analysis may therefore not reflect current conditions.

2.7 Wellingborough's 2006 ELS found that the office market was limited and much of the existing stock was poor. There are however more modern, better quality properties at the Embankment and on the Park Farm Industrial Estate. In addition Wellingborough Innovation Centre provides fully serviced office accommodation. The industrial / warehousing market on the other hand was more dynamic. However, the lack of supply was preventing new companies locating to the area and increasingly leading existing companies to consider relocating. It is hoped that the planned urban extension will trigger a step change to address this shortage and help attract inward investment.

2.8 According to Kettering's 2005 ELS, the town had low levels of built stock for industry and warehousing which was primarily located at Telford Way Industrial Estate, Kettering Business Park, Pytchley Lodge and Latimer Park. Much of the manufacturing built stock was built before the mid 1980's and now was somewhat dated. However, there was very healthy demand for the premises as well as the land on offer. Indeed the ELS noticed a rise in enquiries from businesses seeking to purchase their own sites. However, the majority of sites tended to already be "tied up" with various developers. It also recorded that occupiers increasingly require better quality buildings and sites particularly from the regional and national enquiries. In terms of offices, overall levels of demand have historically been relatively low and Kettering was not considered to be a premier office location.

2.9 The offer has evolved and improved since then and the Northamptonshire Strategic Employment Land Assessment (SELA) considers that given its location on the A14, Kettering has the potential to attract significantly more employment-related development across the B-use sector. High quality development has been and continues to be delivered at Kettering Venture Park and Kettering Business Park. However, as a priority, Kettering requires a high quality employment park to be developed in the near future.

2.10 In Corby, in 2006 the office market was modest. The town centre premises tended to be small and lower quality; the out of town stock was more modern. Overall the market interest was mainly local but with a large employment base (some large companies are present) there is reasonable demand. On the other hand Corby had a large industrial / warehousing base with some large occupiers. There was low availability and most available units were more than 20 years old and often located on industrial estates which would benefit from refurbishment and improved infrastructure.

2.11 From an investment perspective, new development has historically been constrained by market values and demand. However, a range of employment sites are currently available for delivery in the market place or well advanced through the planning process.

2.12 East Northamptonshire has a small office stock with small units spread around the district. Previous studies e.g. Market Towns and Rural Regeneration Study (Entec, May 2004) have highlighted the lack of high quality office premises across the District, particularly the Rural North sector (north of the A14).There are some high quality offices in Rushden Business Park and Crown Park which have changed the offer of the district and attracted new occupiers. The industrial / warehousing stock is much larger and offers a wide range of premises in terms of size and location.

2.13 There have been good levels of occupancy and development in East Northamptonshire over recent years with the link of the A45 onto the A14 at Thrapston having significantly improved the employment offer of the District. However, there has been an arguably excessive element of B8 warehouse development on secondary sites which has reduced the overall level of choice available to industrial occupiers looking to expand in the area.

2.14 Aside from the more general employment land supply, there are also a number of innovation parks in Northamptonshire to cater for companies which require more support. These may be start-ups or businesses which feel they would benefit from close proximity to other highly innovative businesses. These include Corby Enterprise Centre, Chesham House Business Centre in Kettering Town Centre and SATRA Innovation Park in Kettering, which offers serviced office space.

Key Growth Sectors in North Northamptonshire

2.15 Because the district ELSs are now quite dated we have looked in more detail at a number of key sectors, those that delivered the most jobs in North Northamptonshire, to see how performance has varied between districts.

Heath & Education

2.16 In North Northamptonshire health and education are two of the largest growth sectors together delivering over 8,000 new jobs over 10 years.

2.17 But when looking at how well an area is delivering new jobs we must treat these sectors with caution.

2.18 Some of any areas growth in jobs is explained at least in part by the demand generated by the growing population or increased per capita central government spending. Together these two factors are likely to have contributed towards job growth in North Northamptonshire.

2.19 The population of North Northamptonshire has grown by around 30,000 over 10 years and each of these people require access to healthcare and a number to education.

2.20 But these jobs will not be spread evenly across the area. The growth in health jobs will be disproportionally located in districts with hospitals; education in districts with large institutions (colleges etc).

2.21 This may partly explain Kettering's high level of new jobs in health because of the General Hospital. Of the 4,000 new jobs created in the sector between 1998 – 2008 2,000 of these were in Kettering with the remainder split across the rest of North Northamptonshire.

2.22 Another sector whose growth is strongly related to a growing population is Education. Between 1998 and 2008 education employment increased sharply across North Northamptonshire. Whilst partly related to population growth the principal reason was a national expansion in employment in particularly the primary education sector. This is not likely to be repeated in the future.

Warehouse type jobs

2.23 Unsurprisingly warehouse related job growth is the largest growth sector in North Northamptonshire. Warehouse jobs are probably more important as a benchmark indicator than health, education or public administration because it is more footloose and not related to the employment needed to service a growing population. The growth is also not related to central government spending increases (or decreases).

2.24 As noted above North Northamptonshire added nearly 7,000 new jobs in 'wholesale, retail and repair' sectors and a further 2,500 in 'transport, storage and communications' between 1998 - 2008. These are the two broad sectors which are most closely related to warehousing although they also include some other sectors e.g. shops.

2.25 Looking at each individual district of North Northamptonshire we can see that Corby added the most jobs (3,500) followed by East Northamptonshire (3,300) and Kettering (2,600). Perhaps surprisingly Wellingborough lost a small number of jobs.

2.26 This evidence conflicts with the market view presented in the Northamptonshire Strategic Employment Land Study (SELA) which suggested that the warehouse market in Wellingborough was strong. The report made no suggestion that, from a market perspective the delivery of new warehousing in Wellingborough was suffering. The report noted that take-up had been 'extremely healthy' over the past few years.

Business Services (Real Estate, Renting and Business Activates)

2.27 After warehouse related employment the next largest growth sector was Business Services; who most commonly occupy office floor space. However we know from past experience, that many of these jobs are in labour recruitment (i.e. employment agencies). This is a favoured way for many North Northamptonshire companies to recruit labour on flexible contracts across all employment sectors. Of the 5,000 new jobs created in North Northamptonshire 1,100 were in labour recruitment so it is likely that many were not related to office sector growth and instead spread around the economy.

2.28 Excluding these North Northamptonshire still added 4,000 new business service sector jobs over the period. Most of these were gained in either East Northamptonshire or Kettering (1,500 each) or Wellingborough (<1,000). Corby showed a small reduction in business service jobs over the 10 year period.

Manufacturing

2.29 Above we have shown that for most parts of North Northamptonshire job growth has been fuelled by public sector health and education growth, warehousing (except Wellingborough) or business services (except Corby).

2.30 This job growth is often 'hidden' in the headline statistics because many of the new jobs simply offset losses in the manufacturing economy.[3]

2.31 In 1998 manufacturing was the largest sector in North Northamptonshire accounting of 1/3rd of all employment. Between the districts Corby was dependent on manufacturing for 50% of its jobs while in the other North Northamptonshire districts manufacturing accounted for 30% of all employment.

2.32 Over the 10 years all districts lost manufacturing employment. This was particularly the case in the early and middle of this time period. Towards the end of the 10 year period the decline lessened although we may expect the recession to contribute to a further sharp fall when more recent data becomes available.

2.33 The largest losses were in Corby and Wellingborough. They both lost around 5,000 manufacturing jobs over 10 year with most in the early and middle part of the period. The size of the sectors in each authority roughly halved over the 10 year period. Kettering also lost a sizable number of manufacturing jobs; 3,000 or 1/3rd over the period.

2.34 So all three authorities needed to replace these substantial losses before they could report any net additional job growth. But Corby and Wellingborough had more to replace than Kettering.

2.35 East Northamptonshire is the noticeable exception in North Northamptonshire. The district still lost some manufacturing jobs many fewer were lost at a slower rate of decline. East Northamptonshire lost only 1,000 jobs or roughly 1/5th of its total.

2.36 The fact that East Northamptonshire has a much smaller industrial legacy, with fewer traditional manufacturing firms. The historic boot and shoe industry, formerly based in Rushden and Raunds had mostly disappeared by the 1980s/early 1990s so does not appear in subsequent manufacturing data. A sizable food manufacturing sector is probably

[3] This can be seen in our analysis of past trends in Appendix 1.

the key driver to its recent headline success. Simply it had fewer jobs to lose in the first place and those manufacturing jobs in East Northamptonshire are in more resilient sectors.

Job Growth Excluding Manufacturing

2.37 As noted above manufacturing losses have a large impact on the headline total employment numbers. East Northamptonshire, with its more robust manufacturing sector has had to replace very few jobs in new or growing sectors. Whereas Corby with its formerly much larger manufacturing base and heavy rate of loss had been required to replace 5,000 jobs before the total number of jobs in the district has been able to show any growth.

2.38 It is important to recognise this because in the future the economic potential of North Northamptonshire will be less dominated by the need to replace manufacturing jobs. and more about growing new jobs in the wider economy.

2.39 So to help inform the future spatial pattern on job growth in North Northamptonshire it is helpful to look at performance excluding manufacturing; so identifying each areas ability to grow jobs as opposed to simply managing or offsetting the decline of manufacturing.

2.40 Excluding manufacturing losses the stock of jobs in North Northamptonshire grew by 25,000 over 10 years.

2.41 Both Kettering and East Northamptonshire have delivered new jobs outside of manufacturing; more than enough to replace those lost by manufacturing. Simply comparing 1998 and 2008 would suggest they have delivered 9,000 and 8,000 net new jobs respectively.

2.42 However comparing two points in time can sometimes be misleading because data fluctuates year by year. But even looking at alternative years (e.g. 1999-2007) the data still suggests strong non manufacturing employment growth. Also as discussed above Kettering benefited disproportionally from the growth in health jobs.

2.43 Corby remains a weaker performer; generating only 5,000 new jobs across all growing sectors; barely enough to offset the heavy manufacturing losses. This is mainly because the only sector which has shown strong growth is warehousing related employment; education, health and business service growth has been unexceptional.

2.44 However, as we noted above the most surprising find is the very poor performance of Wellingborough. Wellingborough lost a large number of manufacturing jobs in the early to mid part of the 10 year period but unlike Corby failed to replace these in growing sectors.

2.45 For most of North Northamptonshire the continued delivery of warehousing provided the most new jobs outside the public sector. But in Wellingborough the absence of strong warehousing employment growth coupled with poor office performance resulted in a net loss of jobs.

2.46 Within the limited scope of this work we have tried to look in more detail at why Wellingborough may be lagging behind and especially why it lags behind nearby Kettering to which it is often compared.

Warehouse Delivery in Wellingborough

2.47 To try and identify the reasons behind the data we have looked at the SELA report. This was the last comprehensive assessment of the Northamptonshire property market.

2.48 However as noted above it does not suggest any market weakness in Wellingborough. It suggests that market for new warehouse space is strong. The report notes that "*Take up levels have been extremely healthy over the last few years".*

2.49 When looking at the future supply of development land the study suggest that in excess of 150ha of land would be available within 3 years.

2.50 Both these findings do not appear explain the low level of job delivery in Wellingborough. Nor shed any light on the districts poor performance relative to the other North Northamptonshire districts.

2.51 It is likely that the SELA report is over optimistic when assessing the delivery of sites in Wellingborough (and probably across North Northamptonshire). The report includes a considerable caveat suggesting that this maybe the case. The section called 'Concerns expressed by Public Sector Partners' identifies a number of concerns regarding the deliverability and suitability of some sites and significant infrastructure constraints and notes that further work will be required to understand these issues fully through the planning system. .

2.52 It may also be overly optimistic when reporting the market demand for land in North Northamptonshire; or at least not highlighting the comparative attractiveness of competing areas.

2.53 Statistics clearly show a problem with the delivery of new warehouse floorspace in Wellingborough. Between 1998 and 2008 (latest available data) Wellingborough increased its stock of warehouse floorspace by only 28%. Kettering however increased its floorspace by nearly 150%. Corby and East Northamptonshire almost doubled their warehouse floorspace. In absolute terms Wellingborough delivered the least floorspace of all the North Northamptonshire districts.

2.54 For warehouse operators the A45 is Wellingborough's key attribute. But this is shared between East Northamptonshire and also Northampton. Unlike Wellingborough these two neighbours have been able to deliver much more highly accessible, good quality warehouse sites with near direct strategic road access. They have been able to do this without the need to invest in very large highways improvements or new roads / junctions.

2.55 In the northern part of North Northamptonshire both Corby and Kettering have also been able to deliver warehouse floorspace on the back of existing infrastructure. This includes the A14 but also the A43.

2.56 Northern North Northamptonshire also has the possible advantage that unlike Wellingborough the districts do not compete so obviously with new and existing sites in Northampton.

Impact on Wellingborough Jobs

2.57 Contrary to the market analysis reported in SELA we find that the Wellingborough warehouse market has been underperforming relative to the rest of North Northamptonshire. This sectoral underperformance is probably the key reason why the headline employment numbers show the district lagging behind the rest of the area.

2.58 However a key question is whether this matters to the residents of Wellingborough, both new and existing?

2.59 A cursory glance at the district's economic activity rates and unemployment statistics would suggest not. As a simple measure we have looked at the latest unemployment data for both Wellingborough and Kettering. The latest (August 2011) Labour Market Statistics show very similar levels of unemployment, activity rates and job densities in both towns.

2.60 This would suggest that Wellingborough's residents are either employed in the district or elsewhere. This is most likely to be either Northampton or East Northamptonshire.

2.61 Unfortunately the best way to test this relationship is by looking at detailed commuting data; to see where Wellingborough residents are working. But reliable commuting data is only available from the 2001 census and this predates much of the new space built along the A45.

Conclusions

2.62 The analysis above confirms much of the now dated ELS analysis. For most districts the story is well rehearsed.

2.63 Office sector job delivery remains poor and especially in Corby. However many other areas have also achieved limited growth in these sectors.

2.64 Manufacturing has continued to lose employment, although maybe at a slower rate than in the past. Warehousing continues to gain.

2.65 However the analysis points to a continued problem with Wellingborough which because of its constrained land supply has failed to capitalise on the demand for new warehouse space. This has put it at a relative disadvantage.

2.66 But this does not yet appear to have harmed the economic wellbeing of the residents in Wellingborough; probably because new jobs have been provided in next door East Northamptonshire and also Northampton.

2.67 The analysis suggests the relative success of East Northamptonshire in delivering new jobs compared to the other North Northamptonshire districts needs treating with slight caution. The district has delivered new jobs, and we will expect it to continue to build on these strengths. But when the loss of manufacturing is discounted from the analysis Kettering has delivered a similar number of new jobs. As has Corby in the warehouse sector. At least for warehousing the key issue remains the availability of relatively unconstrained land with near immediate strategic road access.

3 THE PREFERRED SPATIAL OPTION

3.1 Appendix 1 sets out the more detailed assessment of the Four Spatial Options. This illustrates that the Northampton Focus Option is the most easily realised employment target (not least because it proposes the lowest number of new jobs) but depends on greater out-commuting and relies on Northampton to deliver jobs. The Twin Poles and Northern Focus place pressure on Corby, and in the case of the Twin Poles, Wellingborough to deliver high levels of jobs growth which run counter to recent past performance. The Core Strategy Plus is considered more plausible with overall growth at similar rates to the past in a number of sectors. If past losses in manufacturing can be stabilised then moderate growth across a range of other sectors can see these targets met. This still relies on much improved jobs performance from Corby and Wellingborough.

3.2 The draft emerging approach sets out the distribution of homes by the 6 sub-areas together with a distribution of jobs split between the Northern Area and Southern Area. The paper shows a distribution of jobs split between 17,400 for the Northern Area and 7,400 for the Southern Area. However this does not appear to reflect either the current distribution of employment and past performance or our understanding of what the North Northamptonshire JPU is trying to achieve in balancing employment growth across North Northamptonshire. As shown in Table 3.1 below if the distribution of jobs followed that of workers then a higher proportion would be located in the Northern Areas.

3.3 We do not have the modelled population and labour supply data for the preferred scenario but we assume the relationships are broadly the same as in the previous models that have been run. We have then constructed an estimate of labour supply change consistent with the preferred scenario. This is set out below and compared with the Core Strategy Plus variant from the previous paper, which is most closely aligned to the spatial strategy in the adopted CSS.

Table 3.1 Modelled Labour Force Change

	Add Dwellings		Lab Force Change	
	Core Plus	Preferred	Core Plus	Preferred
Corby	13,300	15,500	13,278	15,694
Four Towns	6,196	4,100	2,230	27
RNOT	2,437	2,800	-121	238
Kettering	6,898	8,200	3,193	4,537
Rothwell & Desborough	3,511	2,500	1,841	761
Wellingborough	8,963	8,200	4,462	3,626
North Northants	41,300	41,300	24,884	24,883
Northern Area	26,146	29,000	18,191	21,230
Southern Area	15,159	12,300	6,692	3,653

3.4 The Labour Force change is the same as for the Core Strategy Plus but with a slightly higher distribution of workforce in the Northern Area. This reflects the fact that the

Preferred Strategy lies somewhere between the Core Strategy Plus and the Northern Focus.

3.5 The results for Corby produce a much higher worker per dwelling ratio than the other districts. This reflects the current position as set out in Table 1 of the JPU Paper (May 2011).

3.6 The principal reason that Corby has a higher labour force per dwelling figure is the higher household size. Using the Core Strategy Plus population model Corby has an average population per household of 2.36 at 2031. This is only a small reduction from the average of 2.39 at 2011. By comparison the average household rate for Wellingborough falls from 2.33 in 2011 to 2.18 at 2031.

Jobs Scenario

3.7 We have assumed that broadly the JPU wants to achieve alignment between growth in workers and growth in jobs and therefore used the labour force projections set out in Table 3.1 as our starting point. But we have then taken into account both demand factors relating in particular to past performance, and also available supply. These factors have been discussed in the preceding Chapters 2 and 3.

3.8 There are thus three components to the projections that we have used to guide the minimum job targets:

- Labour force projections –this forms basis for the targets subject to the supply and demand constraints set out below.
- Demand constraints - the labour supply projections are then tempered by demand constraints. We use past employment growth as an indicator of future demand potential.
- Supply constraints - we have looked to see if there are any capacity constraints that might prevent the projections from being realised. Capacity has not been used to derive the figures as they are minimum targets. At the local level more ambitious targets might be set to realise policy ambitions.

3.9 The labour force projections set out in Table 3.1 only appear demand constrained for one district or sub-area. The jobs target for Corby appears very challenging in the light of past performance. A growth target of 15,700 jobs for Corby contrasts with employment decline over the period 1998-2008 raises issues of deliverability. As a result we believe it is appropriate to redistribute the spatial balance based on the labour force projections by reducing the jobs target for Corby.

3.10 The process for doing this is to form a judgement as to a realistic but still testing target for Corby and to allocate the balance around the other sub-areas We have therefore reduced the Corby target by 6,000 and redistributed this amongst the remaining areas where the capacity for growth would appear greater. This would still leave Corby needing to increase employment at a rate of 1.4% p.a. over the plan period, a rate well above the national average and which would require Corby to be one of the fastest growing economies in the country.

3.11 The redistribution of the 6,000 jobs is as follows:

- 500 jobs to Four Towns – to reflect local growth opportunities and strong past performance
- 500 jobs to RNOT – to reflect local growth opportunities and strong past performance
- 3,000 jobs to Kettering – as the neighbouring urban district to Corby as part of the northern functional area which has successfully attracted growth in the past
- 500 jobs to Rothwell and Desborough – to reflect local growth opportunities
- 1,500 jobs to Wellingborough - to reflect its growth ambitions and its objective to reclaim some out-commuting.

3.12 It should be stressed that these are minimum jobs targets and should not be seen as a constraint on future ambitions.

3.13 It also reflects the consultants judgement based on our understanding of the Preferred Scenario objectives. It is not a precise formula and the JPU may wish to amend to better reflect their objectives.

Table 3.2 Minimum Jobs Targets Preferred Scenario

	Job Change 2011-31
	9,662
Four Towns	525
RNOT	736
Kettering	7,512
Rothwell & Desborough	1,257
Wellingborough	5,109
North Northants	24,800
Northern Area	19,166
Southern Area	5,634

3.14 As we have moved away from the strict jobs workers balance this will change the overall jobs worker ratios in the future. This is set out in Table 3.3 below. The figures are only approximate as we have taken the 2009 data from Table 1 of the May 2011 JPU report and added the forecast change in jobs and workers to generate the 2031 estimate.

Table 3.3 Jobs Worker Ratios

	Workers 2009	Jobs 2009	Jobs/Worker 2009	Workers 2031	Jobs 2031	Jobs/Worker 2031
Corby	29,594	29,053	0.98	45,403	38,715	0.85
Four Towns	30,801	15,731	0.51	30,828	16,256	0.53
RNOT	11,481	10,537	0.92	11,721	11,273	0.96
Kettering	35,172	31,234	0.89	39,742	38,746	0.97
Rothwell & Desborough	13,717	4,729	0.34	14,484	5,986	0.41
Wellingborough	40,810	31,652	0.78	44,463	36,761	0.83
North Northants	164,575	122,936	0.75	189,459	147,736	0.78

Indicative Sector Split

3.15 To illustrate how these levels of jobs growth might be achieved for each district we have prepared three sectoral growth scenarios at district level for the preferred spatial scenario. These are not intended to be forecasts or targets but to help understand different ways in which growth might be achieved.

- Scenario **a** illustrates the growth pattern if sectoral proportions are held constant at 2008 levels. i.e. the district will have the same sectoral structure at the end of the plan period as at the start. This is an unlikely outcome but a good benchmark against which to asses the level of structural change required.
- Scenario **b** apportions growth according to sectoral growth over the past period 1998-2008. Where a sector has experienced a loss of employment in the past we assume the best that can be achieved is to maintain employment at constant levels. For those sectors that experienced positive growth in the past employment growth is factored up proportionately to equate to the target figure.
- Scenario **c** applies forecast regional growth rates by sector from the Working Futures Report[4]. The regional sectoral growth projections are applied to the baseline employment structure of each district. Sectors with positive growth are then factored up proportionately to achieve the target growth figure.
- A past growth column is also included to illustrate how this might compare to what has happened in the past. To do this we assume the same level of growth is maintained for a second ten year period. This is included as a benchmark rather than a scenario as in some cases the change in employment would imply a negative jobs total at 2031.

[4] Working Futures 2007-2017. Warwick Institute for Employment Research (2008). Published by UK Commission for Employment and Skills

Table 3.4 Corby Preferred Option Scenario

Corby	2008	2011-31 a	2011-31 b	2011-31 c	Past Growth
Agriculture, hunting and forestry	20	7	0	-7	-12
Fishing	0	0	0	0	0
Mining and quarrying	0	0	0	0	-4
Manufacturing	8,956	2,926	0	-1,777	-10,502
Electricity, gas and water supply	26	8	25	-10	28
Construction	935	305	183	748	202
Wholesale, retail trade and repair	6,715	2,194	1,889	2,792	2,088
Hotels and restaurants	1,178	385	0	490	-190
Transport, storage and communication	3,645	1,191	4,400	1,516	4,864
Financial intermediation	169	55	0	177	-82
Business Services	3,307	1,080	0	3,468	-462
Public administration and defence	901	294	810	441	896
Education	1,642	536	1,424	804	1,574
Health and social work	1,257	411	729	616	806
Social and personal services	824	269	203	404	224
Total	**29,574**	**9,662**	**9,662**	**9,662**	**-570**

3.16 Corby needs to achieve substantially higher jobs growth than in the past. Its current sectoral structure is not favourable and regional growth rates would only deliver 1,700 additional jobs.

3.17 Stemming the losses in manufacturing employment is a critical first step to achieving 9,600 additional jobs. At present the business services sector does not seem to be a good growth prospect for Corby though it should seek to gain some presence in this sector. Somewhere between Scenario **a** and Scenario **b** would probably give Corby the best prospects of reaching its target with modest growth in service sectors, losses in manufacturing reversed and the warehousing and distribution sectors as the principal growth prospect.

Table 3.5 East Northamptonshire Preferred Option Scenario

East Northamptonshire	2008	2011-31 a	2011-31 b	2011-31 c	Past Growth
Agriculture, hunting and forestry	670	31	26	-249	358
Fishing	0	0	0	0	0
Mining and quarrying	9	0	0	-3	-38
Manufacturing	5,160	239	0	-1,024	-1,522
Electricity, gas and water supply	0	0	0	0	0
Construction	1,652	77	24	271	324
Wholesale, retail trade and repair	5,997	278	419	511	5,556
Hotels and restaurants	1,366	63	0	116	-242
Transport, storage and communication	1,873	87	77	160	1,024
Financial intermediation	281	13	10	60	138
Business Services	3,462	160	281	744	3,732
Public administration and defence	438	20	28	44	370
Education	2,768	128	244	278	3,240
Health and social work	2,122	98	101	213	1,342
Social and personal services	1,414	66	49	142	656
Total	**27,212**	**1,261**	**1,261**	**1,261**	**14,938**

3.18 For East Northamptonshire the targets imply setting a minimum job target below that suggested compared to past performance.

3.19 Modest growth can be achieved across a range of sectors and there is probably little intervention needed in terms of new land allocations. On the contrary this would probably imply a policy of quite strict restraint.

3.20 As with all North Northamptonshire there is a rationale for allowing a higher, above minimum, target for new jobs. This could be supported by emerging national planning policy which does not seek to constrain economic growth. However, when considering the merit of doing so planners must also not lose sight of the link between jobs and new homes and a high job target could be used to justify a higher housing target.

3.21 It will therefore be important to consider the relationship between jobs and new homes, alongside the existing jobs/worker ratio with the specific sectors and a wider North Northamptonshire HMA context.

Table 3.6 Kettering Preferred Option Scenario

Kettering	2008	2011-31 a	2011-31 b	2011-31 c	Past Growth
Agriculture, hunting and forestry	210	50	4	-78	8
Fishing	0	0	0	0	0
Mining and quarrying	0	0	0	0	-8
Manufacturing	5,853	1,398	0	-1,162	-6,122
Electricity, gas and water supply	91	22	84	-34	182
Construction	1,876	448	471	862	1,016
Wholesale, retail trade and repair	7,436	1,776	2,162	1,775	4,660
Hotels and restaurants	2,061	492	262	492	564
Transport, storage and communication	1,804	431	289	431	624
Financial intermediation	428	102	0	258	-372
Business Services	4,534	1,083	1,590	2,730	3,428
Public administration and defence	970	232	416	273	896
Education	2,701	645	1,125	760	2,426
Health and social work	7,260	1,734	1,958	2,042	4,222
Social and personal services	1,496	357	407	421	878
Total	**36,720**	**8,769**	**8,769**	**8,769**	**12,402**

3.22 Kettering's target does not appear too testing when compared to past growth rates but does a imply strong growth rate of over 1% p.a. Regional growth rates applied to Kettering's sectoral structure would only deliver an additional 4,000 jobs.

3.23 Kettering's growth can come from a range of sectors with possibly additional growth required in the distribution sector to offset lower than forecast growth in the health sector.

Table 3.7 Wellingborough Preferred Option Scenario

Wellingborough	2008	2011-31 a	2011-31 b	2011-31 c	Past Growth
Agriculture, hunting and forestry	194	31	39	-72	72
Fishing	0	0	0	0	0
Mining and quarrying	0	0	0	0	-96
Manufacturing	5,692	912	0	-1,130	-9,354
Electricity, gas and water supply	5	1	5	-2	10
Construction	1,436	230	0	464	-304
Wholesale, retail trade and repair	7,347	1,177	158	1,235	290
Hotels and restaurants	1,569	251	134	264	246
Transport, storage and communication	2,326	373	0	391	-1,786
Financial intermediation	668	107	44	283	82
Business Services	5,185	831	1,832	2,198	3,360
Public administration and defence	1,547	248	814	306	1,494
Education	2,127	341	978	421	1,794
Health and social work	2,361	378	1,103	467	2,024
Social and personal services	1,426	228	0	282	-576
Total	**31,884**	**5,109**	**5,109**	**5,109**	**-2,744**

3.24 Wellingborough growth target is high compared to past performance, but the past has seen under-performance with losses in manufacturing not offset by growth in other sectors. At regional growth rates Wellingborough should be able to achieve growth of 3,600 jobs.

3.25 If losses in manufacturing can be stemmed then growth targets in other sectors are relatively modest and both business services and distribution sectors can make a contribution.

Table 3.8 North Northants Preferred Option Scenario

North Northants	2008	2011-31 a	2011-31 b	2011-31 c	Past Growth
Agriculture, hunting and forestry	1,094	119	70	-407	426
Fishing	0	0	0	0	0
Mining and quarrying	9	0	0	-3	-146
Manufacturing	25,661	5,475	0	-5,093	-27,500
Electricity, gas and water supply	122	31	115	-45	220
Construction	5,899	1060	678	2,345	1,238
Wholesale, retail trade and repair	27,495	5,425	4,627	6,313	12,594
Hotels and restaurants	6,174	1191	396	1,362	378
Transport, storage and communication	9,648	2,082	4,766	2,497	4,726
Financial intermediation	1,546	277	55	779	-234
Business Services	16,488	3,154	3,703	9,140	10,058
Public administration and defence	3,856	794	2,068	1,064	3,656
Education	9,238	1,650	3,771	2,263	9,034
Health and social work	13,000	2,621	3,892	3,338	8,394
Social and personal services	5,160	920	659	1,249	1,182

3.26 Whilst overall rates of growth for North Northamptonshire are similar to those achieved over the period 1998-2008, the sectoral distribution is very different. Manufacturing jobs will not decline at the same rate as the past therefore other sectors do not have to grow so strongly to make up the deficit.

3.27 For North Northamptonshire as a whole a sectoral growth pattern lying somewhere between Scenario b and Scenario c looks quite plausible. More challenging, but still realistic, is the spatial distribution implied by the Preferred Strategy.

A Potential Land Supply Scenario

3.28 The analysis above does not consider the availability of land and the potential to move jobs to areas with the most available land. Land supply tends to reflect past allocations rather than future demand. In many cases in North Northamptonshire the available land supply is largely that remaining undeveloped from previous plans. In such cases the land supply is an inverse indicator of demand. This is because in some districts the remaining pipeline is made up of sites which the market (for one reason or another) has been unwilling or unable to take-up. Whereas in other areas the market has successfully delivered almost all the sites formally allocated in old plans, reflecting the demand for those sites.

3.29 So a potential land supply scenario could mechanically move the future distribution of new jobs to areas with the poorest market potential and to more risky and constrained sites; while restricting the supply of new sites in areas with a track record of successful delivery.

3.30 Neither does land supply necessarily follow the Preferred Spatial Option and the proposed distribution of new homes.

4 CONCLUSIONS &EMERGING LAND SUPPLY IMPLICATIONS

Using the Targets

A Preferred Sector Split

4.1 To illustrate how these levels of jobs growth might be achieved for each district we have prepared three sectoral growth scenarios at district level for each spatial scenario (see 3.7 above). In summary these are:

- Scenario **a** illustrates the growth pattern if sectoral proportions are held constant at 2008 levels.
- Scenario **b** apportions growth according to sectoral growth over the past period 1998-2008.
- Scenario **c** applies forecast regional growth rates by sector from the Working Futures Report.

4.2 A past growth column is also included to illustrate how this might compare to what has happened in the past. As a minimum job number Scenario **b** is likely to easiest to deliver because it focuses growth into sectors with a track record of delivery and a high level of market interest in promoting additional sites (and so jobs).

4.3 But moving towards Scenario **c** better meets local aspirations to diversify the local economy and reduces the dependency on new warehouses. This is more challenging because it suggests constraining the delivery of warehousing jobs below past trends while increasing the delivery of office type jobs above the level the Districts have so far been able to deliver.

4.4 Also if the growth of warehouses is to be constrained in this way then the Councils will need strong justification; bearing in mind that strategic warehousing in Northamptonshire is of national economic importance.

4.5 If North Northamptonshire is to constrain the delivery of new warehouses they will need to demonstrate that the:

"adverse impacts of allowing development would significantly and demonstrably outweigh the benefits" (Paragraph 14; Draft NPPF)

4.6 It is outside the scope of this limited study to weigh up all these various considerations and form this judgement.

Minimum Job Targets

4.7 The numbers we have developed above are minimum job targets; in line with the JPU spatial options background paper which expresses 24,800 as a 'minimum'.

4.8 As such the numbers we have developed should not be used to constrain the supply of land where other evidence, balanced with other planning considerations, suggests a higher rate of delivery is warranted.

4.9 However in doing so councils must not lose sight of the need to demonstrate delivery (discussed below) or the emerging duty to co-operate. Any single district which promotes grossly more jobs than it can justify by its own housing growth (i.e. re-calling outward commuters) will need to consider the impact of that strategy on its neighbour's plans and strategies.

Demonstrating Deliverability

4.10 In whatever development strategy emerges there needs to be a clear separation of those sites which are promoted because they meet a policy aspiration, in terms of their sector mix or location, from those which are in market demand and deliverable.

4.11 Only those sites which can demonstrate up to date market evidence showing they are deliverable should count towards the minimum job numbers above.

4.12 This means that much of the North Northamptonshire land portfolio needs a very harsh critical re-appraisal before any development sites are rolled forward into a new development plan period. Most obviously sites which failed to be delivered in the pre-recession period; or were promoted pre-credit crunch need re-appraising.

4.13 There may also be merit in introducing small new sites where the land supply is dominated by a limited number of large and constrained sites; so minimising risk.

4.14 We understand that viability work, looking at the site portfolio, is ongoing. It will be important for this to not only consider the viability of individual development sites but also the collective viability of the sites in terms of market demand, labour availability and external infrastructure. Most noticeably the potential combined impact of the delivery of sites on the highway network and the land strategy being promoted in West Northamptonshire. By doing so the work should hopefully address some of the main *'concerns expressed by public sector partners'* which heavily caveat the SELA report.

4.15 The JPU and districts also need to be confident that any infrastructure requirements can be delivered given the restraint on public sector funding.

Choice and Flexibility

4.16 Thirdly the plan should allow for choice and flexibility in the land market. But how the plan achieves this is debatable.

4.17 For warehousing the demand for new warehousing land in most of North Northamptonshire continues to run above a level the planners and local communities feel is sustainable. The sustainable infrastructure capacity of North Northamptonshire is likely to constrain the delivery of new warehouses before market demand is exhausted.

4.18 Therefore providing additional land for 'market choice' is challenging because it is likely that the high level of market demand will seek to develop both the target and 'choice' elements' of the supply, especially if both sets of allocations are justified because the owners can demonstrate that they are all deliverable.

4.19 Instead the plan should manage the flexibility through its proposed phasing; bringing forward planned sites or phases earlier if needs be. If for whatever reason the land supply proves insufficient then this would be a sound justification to review the plan.

4.20 The argument that more land needs to be promoted to secure choice is different for office land. The North Northamptonshire (and also West Northamptonshire) development plans have continually over provided office land compared to market take-up. The real issue has not been a lack of sites but a lack of market demand. The market has failed to meet the planned aspirations of new office jobs.

4.21 On one hand this over allocation is not harmful; if the sites are in policy acceptable locations. But what is poorly understood is whether the gross over provision of land compared to a realistic assessment of market demand could undermine investment confidence; so making any development less viable.

4.22 There is clearly a balance to be struck between ensuring a robust supply of sites is promoted and that the market is not oversupplied to such an extent that the provision starts to loose market credibility. We suggest this needs further research; probably as part of the re-assessment of development of sites and the ongoing viability assessment.

4.23 For General Industrial Land there is a qualitative need to provide new sites across North Northamptonshire, justified to replace poorer quality stock lost to other uses and ensure occupiers have a choice of new and old property. How much is promoted largely depends on the quality of the existing stock and its ability to meet modern market requirements and also to potentially cater for aspirational growth sectors.

Land Supply Implications

4.24 Our analysis has focused on broad economic sectors. Further work will be needed to robustly translate these broad sector scenarios into land. So for example splitting the 'Wholesale, retail trade and repair' sector into land for warehouses, shops and motor garages. However using the broad sectors we can start to draw some conclusions relating to the supply of land, and the sectors to achieve jobs growth.

4.25 We have not undertaken a comprehensive audit of the land supply in North Northamptonshire. The Joint Planning Unit is in the process of undertaking this to better match the land supply to demand along with the viability work mentioned above.

4.26 For simplicity the commentary below relates to local authority districts but it should be noted that the impact of some sites may have cross boundary implications.

Corby

4.27 In our minimum job number developed above we suggested just under 10,000 new jobs are provided in Corby. The majority of these jobs are in sectors we associate with warehouse development; although in common with all districts scenario C increases office jobs at the expense of warehouses.

4.28 Subject to further testing by the JPU the delivery of the minimum job target is unlikely to be constrained by the availability of development land. The 2009 emerging LDF proposed 220ha of new land and already proposed to exceed earlier land targets.

4.29 There are aspirations to deliver jobs outside the warehousing sector. Including using new warehouses as a mechanism to open up new sites and to act as a catalyst to wider regeneration in new sectors. This approach is compatible with the minimum job number we have identified because the target should not be used as a constraint where policy acceptable development sites are promoted; especially for sectors the Borough considers a priority to deliver.

4.30 The most noticeable example where this may apply is in the Rockingham Development Framework area. A recent Master plan has suggested in excess of 20,000 new jobs can be delivered in this area. But we are cautious about this because so far the key issues the Core Strategy needs to address surrounding viability and deliverability have not yet been answered.

4.31 However should further evidence, particularly demonstrating delivery, be provided then Corby should not use the job numbers as a constraint to development and further work looking at phasing and the boroughs comprehensive development strategy is justified; including looking at whether is it feasible or derivable to deliver such a large number of jobs within a single plan period. It should be noted that the Rockingham Development area will also support jobs growth in the RNOT sector, as part of the site is located within this area.

Kettering

4.32 We understand that Kettering has a very limited supply of new development land in the planning pipeline. A small number of sites are being promoted for new B1 jobs, most noticeably East Kettering and the town centre. These two proposals aim for around 5,000 new office jobs. A number of smaller sites bring the total supply to 6,500 new office jobs.

4.33 Our indicative split of jobs by sector would suggest that this level of growth is optimistic; but the numbers are minimum so there is no justification to adjust these proposals providing the Councils remain confident that they remain deliverable.

4.34 However the largest concern relates to the availability of new warehousing land. The pipeline of sites has now been largely exhausted. The data we have been provided with shows almost no new supply of warehousing land. Given the difficulty in providing new jobs outside of the sector across North Northamptonshire, effectively cutting off the supply of new land for warehousing would appear risky.

4.35 As discussed elsewhere warehouse related activities have to date provided most of the new jobs in the B space sectors. So there is a rational, and risk adverse strategy, to continue providing land in line with past trends. However this must be balanced with a policy desire to change the trajectory of the districts growth and reduce the reliance on warehousing.

4.36 In our preferred scenario the delivery of new jobs for warehousing sectors is roughly 50% of the past trend (e.g. 2,100 jobs in wholesale vs 4,600 using a past tend approach over the plan period), which would appear to be a sensible compromise.

4.37 However this still requires new land. The SELA report strongly endorsed a new allocation at Kettering South (J9 of the A14) and our analysis would provide additional support for exploring this. The SELA proposal was for 110 ha of land. It is unlikely that all of this could be justified but further work would be needed to develop a deliverable and viable supply which provides enough new space to overcome any infrastructure constraints. There are also proposals for a new business park at Junction 10 of the A14 which was supported by the SELA.

Wellingborough

4.38 Our minimum job number above (5,000) is very low compared to the committed supply. The data we have been given suggests that there are planning consents which could provide between 7,600 and 11,600 jobs and other proposed or promoted sites could deliver between 8,000 and 9,600 additional jobs.

4.39 However most of this supply has been promoted for many years but has yet to be delivered. A continuation of past trends would suggest the Borough loses jobs.

4.40 The credit crunch, the recession and public sector funding constraints means that the economic and practical realities of delivering large ambitious development schemes, such as WEAST, are now dramatically different from when schemes were first promoted.

4.41 Even before the credit crunch the delivery of new office jobs outside of ‘hot spots’ was challenging; even Northampton has struggled to develop new offices on key motorway sites.

4.42 Therefore there is a clear rational for re-examining these schemes, focussing on delivery, to ensure that at least the minimum job number is achieved.

4.43 We know that the minimum job number is unlikely to meet local aspirations and a desire to re-call out commuters. But as noted above the emerging ‘duty to co-operate’ may complicate this assumption. In any scenario where a single district expects to re-call a large number of its outward commuters it may need the agreement of its neighbours. This is because such an approach is likely to adversely harm their own growth prospects.

East Northamptonshire

4.44 East Northamptonshire has delivered very strong job growth in the past and there is clearly market demand for new employment space in the area.

4.45 However in the future the growth of the labour force is unlikely to sustain this level of growth. A large number of new homes and inward migrants would be needed to support this level of job growth and this is not being proposed at the moment. As we noted above National Policy does not seek to constrain economic growth; but it also seeks to increase the delivery houses in areas of economic potential. So any policy approach which promotes a high number of jobs needs considering along side the areas ability to sustainably delivery new homes.

4.46 The high level of market demand is one justification for providing more land than the minimum targets would suggest. But another could be that there is a more readily available land supply for new allocations than Wellingborough and Kettering; at least in the short term. As discussed above Wellingborough’s supply remains largely constrained and the Kettering pipeline (for warehousing) is largely exhausted. At least until a new, deliverable supply is confirmed, East Northamptonshire has a continuing role in supporting its neighbours.

APPENDIX 1

Spatial Options

Introduction

1. The four spatial options are discussed in detail in the JPU June 2011 background paper and are summarised below:

Option A
Core Strategy Plus: the current strategy but with a greater role for Rushden and more detail for the rural areas and small towns.

Option B
Twin Poles: instead of treating North Northamptonshire as a single functional area, this option builds on existing relationships and the distinctive character of the north (Corby/ Kettering and surrounding settlements) and the south (Wellingborough/ Rushden and surrounds).

Option C
Northern Focus: with a strong focus on Corby and Kettering for housing, jobs and retail growth as a counterpoint to Northampton. The southern area (Wellingborough and the Four Towns) would increasingly look to Northampton for jobs and services. This would mean putting the bulk of the housing growth in Corby/Kettering and focusing higher order facilities and retail growth in these two towns.

Option D
Northampton Focus: focusing on supporting Northampton's role and on growth in the north-south corridor covering Corby/ Kettering/ Wellingborough. This would be based around much improved transport links, allowing North Northamptonshire residents to access jobs and higher order facilities and services in Northampton.

2. For each of these four scenarios we look at what the implications would be for each of the four districts in terms of growth compared to past performance and in terms of the implications for growth at the sectoral level.

Core Strategy Plus

3. Table 10 of the Background paper shows that for the Core Strategy Plus there is an indicative minimum job requirement of 24,800 jobs over the period 2011-31. Whilst for North Northants as a whole this implies a growth rate similar to past performance the pattern at the district level is very different. Table A1.1 below compares growth over the past ten year period 1998-2008 with the twenty year plan period 2011-31.

Table A1.4.1 Past and Planned Growth Core Strategy Plus

	1998-2008	2011-31	1998-2008	2011-31
	Number	Number	% p.a.	% p.a.
Corby	-286	6,894	-0.1%	1.1%
East Northamptonshire		3,324	3.3%	0.6%
Kettering	6,202	8,283	1.9%	1.0%
Wellingborough	-1,371	6,299	-0.4%	0.9%
North Northants	12,012	24,800	1.0%	0.9%

4. To illustrate how these levels of jobs growth might be achieved for each district for have prepared two sectoral growth scenarios at district level for each spatial scenario.

- Scenario **a** illustrates the growth pattern if sectoral proportions are held constant at 2008 levels. i.e. the district will have the same sectoral structure at the end of the plan period as at the start.
- Scenario **b** apportions growth according to sectoral growth over the past period 1998-2008. Where a sector has experienced a loss of employment in the past we assume the best that can be achieved is to maintain employment at constant levels. For those sectors that experienced positive growth in the past employment growth is factored up proportionately to equate to the target figure.
- A past growth column is also included to illustrate how this might compare to what has happened in the past. To do this we assume the same level of growth is maintained for a second ten year period. This is included as a benchmark rather than a scenario as in some cases the change in employment would imply a negative jobs total at 2031.

5. These are not the only way such growth levels can be achieved but by relating to existing structures and past performance they do provide a useful guide to understanding where growth may come from and what may need to be changed if future growth targets are to be met.

6. For the purpose of this exercise it is used to provide a guide as to the broad land use classes that allocations should be made for. Land for Business class activity will come primarily from the financial and business services sectors for offices; from the manufacturing sector for industrial land; and from the transport or distribution sectors for warehousing land. Employment in other sectors will not place the same demands on B-space land to be allocated.

7. Within each of these broader sectors there will be more specific activities with different growth prospects.

8. For Corby Scenario **a** would imply an additional 2,000 jobs in manufacturing, running counter to past trends. It would also mean an additional 1,600 jobs in wholesale retail and repair and a further 8000 jobs in business services.

9. Scenario **b** also requires strong growth in wholesale, retail and repair with 1,300 jobs plus a further 3,100 in transport, storage and communications. It also implies an additional 1,00 jobs in education, a sector that is unlikely to experience the same levels of jobs growth nationally as it did during the last decade.

Table A1.4.2 Corby Core Strategy Plus Scenarios

Corby	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	20	5	0	-12
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-4
Manufacturing	8,956	2,088	0	-10,502
Electricity, gas and water supply	26	6	18	28
Construction	935	218	130	202
Wholesale, retail trade and repair	6,715	1,565	1,348	2,088
Hotels and restaurants	1,178	275	0	-190
Transport, storage and communication	3,645	850	3,139	4,864
Financial intermediation	169	39	0	-82
Business Services	3,307	771	0	-462
Public administration and defence	901	210	578	896
Education	1,642	383	1,016	1,574
Health and social work	1,257	293	520	806
Social and personal services	824	192	145	224
Total	**29,574**	**6,894**	**6,894**	**-570**

10. For East Northamptonshire growth in line with existing structure under Scenario a gives modest growth across a range of sectors with 700 jobs in wholesale, retail and repair 600 jobs in manufacturing, and 400 jobs in business services.

11. Scenario b produces a growth of 1,110 jobs in wholesale, retail and repair, 700 in Business Services and 600 in Education.

Table A1.4.3 East Northamptonshire Core Strategy Plus Scenarios

East Northamptonshire	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	670	82	71	358
Fishing	0	0	0	0
Mining and quarrying	9	1	0	-38
Manufacturing	5,160	630	0	-1,522
Electricity, gas and water supply	0	0	0	0
Construction	1,652	202	64	324
Wholesale, retail trade and repair	5,997	733	1,103	5,556
Hotels and restaurants	1,366	167	0	-242
Transport, storage and communication	1,873	229	203	1,024
Financial intermediation	281	34	27	138
Business Services	3,462	423	741	3,732
Public administration and defence	438	54	73	370
Education	2,768	338	643	3,240
Health and social work	2,122	259	266	1,342
Social and personal services	1,414	173	130	656
Total	**27,212**	**3,324**	**3,324**	**14,938**

12. For Kettering Scenario a gives growth of 1,700 jobs in wholesale, retail and repair,1,600 jobs in Health and social work 1,300 jobs in manufacturing, and 1,000 jobs in business services.

13. Scenario b produces a growth of 2,000 jobs in wholesale, retail and repair, 1,900 jobs in Health and social work 1,500 in Business Services and 1,000 in Education.

Table A1.4.4 Kettering Core Strategy Plus Scenarios

Kettering	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	210	47	4	8
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-8
Manufacturing	5,853	1,320	0	-6,122
Electricity, gas and water supply	91	21	80	182
Construction	1,876	423	445	1,016
Wholesale, retail trade and repair	7,436	1,677	2,042	4,660
Hotels and restaurants	2,061	465	247	564
Transport, storage and communication	1,804	407	273	624
Financial intermediation	428	97	0	-372
Business Services	4,534	1,023	1,502	3,428
Public administration and defence	970	219	393	896
Education	2,701	609	1,063	2,426
Health and social work	7,260	1,638	1,850	4,222
Social and personal services	1,496	337	385	878
Total	**36,720**	**8,283**	**8,283**	**12,402**

14. For Wellingborough Scenario a gives growth of 1,500 jobs in wholesale, retail and repair, 1,100 jobs in manufacturing, and 1,000 jobs in business services.

15. Scenario b produces a growth of 2,300 in Business Services, 1,400 jobs in Health and social work and 1,200 in Education and 1,000 in Public administration.

Table A1.4.5 Wellingborough Core Strategy Plus Scenarios

Wellingborough	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	194	38	48	72
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-96
Manufacturing	5,692	1,125	0	-9,354
Electricity, gas and water supply	5	1	7	10
Construction	1,436	284	0	-304
Wholesale, retail trade and repair	7,347	1,451	195	290
Hotels and restaurants	1,569	310	165	246
Transport, storage and communication	2,326	460	0	-1,786
Financial intermediation	668	132	55	82
Business Services	5,185	1,024	2,258	3,360
Public administration and defence	1,547	306	1,004	1,494
Education	2,127	420	1,206	1,794
Health and social work	2,361	466	1,360	2,024
Social and personal services	1,426	282	0	-576
Total	**31,884**	**6,299**	**6,299**	**-2,744**

16. At the North Northants level as a whole this scenario looks more plausible with overall growth at similar rates to the past in a number of sectors. If past losses in manufacturing can be stabilised then moderate growth across a range of other sectors can see these targets met. Growth levels in wholesale, retail and repair, may need to be close to past levels of growth in order to compensate for lower levels of growth in public administration, health and education. Whilst we would expect employment in these sectors to pick up again when current levels of public debt have been reduced, we would not expect growth to resume at rates of the past decade.

Table A1.4.6 North Northants Core Strategy Plus Scenarios

North Northants	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	1,094	172	123	426
Fishing	0	0	0	0
Mining and quarrying	9	1	0	-146
Manufacturing	25,661	5,163	0	-27,500
Electricity, gas and water supply	122	28	105	220
Construction	5,899	1,127	640	1,238
Wholesale, retail trade and repair	27,495	5,426	4,688	12,594
Hotels and restaurants	6,174	1,217	412	378
Transport, storage and communication	9,648	1,946	3,616	4,726
Financial intermediation	1,546	302	83	-234
Business Services	16,488	3,241	4,501	10,058
Public administration and defence	3,856	789	2,048	3,656
Education	9,238	1,750	3,928	9,034
Health and social work	13,000	2,656	3,997	8,394
Social and personal services	5,160	984	660	1,182
Total	**125,390**	**24,800**	**24,800**	**24,026**

Twin Poles

17. The Twin Poles scenario generates a higher level of employment growth averaging 1.2% p.a. over the plan period. This is some 20% above the rate achieved in the past and represents a very challenging target. It requires particularly high growth rates for Corby and Wellingborough, especially compared with what they have achieved in the past.

Table A1.4.7 Twin Poles Scenarios

	1998-2008	2011-31	1998-2008	2011-31
	Number	**Number**	**% p.a.**	**% p.a.**
Corby	-286	8,898	-0.1%	1.3%
East Northamptonshire	7,467	3,822	3.3%	0.7%
Kettering	6,202	8,076	1.9%	1.0%
Wellingborough	-1,371	12,568	-0.4%	1.7%
North Northants	12,012	33,364	1.0%	1.2%

18. For each of the scenarios sectoral patterns of growth will be similar to that of the Core Strategy Plus, through the levels will differ. We therefore do not discuss each table separately but present the tables and comment on the likelihood of their being achieved at the end.

19. For Corby the key is what happens to manufacturing. If losses can be stabilised then growth in other sectors appears at plausible levels.

Table A1.4.8 Corby Twin Poles Scenarios

Corby	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	20	6	0	-12
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-4
Manufacturing	8,956	2,695	0	-10,502
Electricity, gas and water supply	26	8	23	28
Construction	935	281	168	202
Wholesale, retail trade and repair	6,715	2,020	1,739	2,088
Hotels and restaurants	1,178	354	0	-190
Transport, storage and communication	3,645	1,097	4,052	4,864
Financial intermediation	169	51	0	-82
Business Services	3,307	995	0	-462
Public administration and defence	901	271	746	896
Education	1,642	494	1,311	1,574
Health and social work	1,257	378	671	806
Social and personal services	824	248	187	224
Total	**29,574**	**8,898**	**8,898**	**-570**

20. For East Northants growth levels are very moderate and imply a policy of restraint which may be contrary to national guidance on planning positively for economic development. We discuss this in more detail later in the report.

Table A1.4.9 East Northamptonshire Twin Poles Scenarios

East Northamptonshire	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	670	94	82	358
Fishing	0	0	0	0
Mining and quarrying	9	1	0	-38
Manufacturing	5,160	725	0	-1,522
Electricity, gas and water supply	0	0	0	0
Construction	1,652	232	74	324
Wholesale, retail trade and repair	5,997	842	1,268	5,556
Hotels and restaurants	1,366	192	0	-242
Transport, storage and communication	1,873	263	234	1,024
Financial intermediation	281	39	32	138
Business Services	3,462	486	852	3,732
Public administration and defence	438	62	84	370
Education	2,768	389	740	3,240
Health and social work	2,122	298	306	1,342
Social and personal services	1,414	199	150	656
Total	**27,212**	**3,822**	**3,822**	**14,938**

21. Kettering will need to ensure business services growth is sufficient to take up the employment growth previously coming from the health and education sectors.

Table A1.4.10 Kettering Twin Poles Scenarios

Kettering	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	210	46	3	8
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-8
Manufacturing	5,853	1,287	0	-6,122
Electricity, gas and water supply	91	20	78	182
Construction	1,876	413	434	1,016
Wholesale, retail trade and repair	7,436	1,635	1,991	4,660
Hotels and restaurants	2,061	453	241	564
Transport, storage and communication	1,804	397	267	624
Financial intermediation	428	94	0	-372
Business Services	4,534	997	1,464	3,428
Public administration and defence	970	213	383	896
Education	2,701	594	1,036	2,426
Health and social work	7,260	1,597	1,804	4,222
Social and personal services	1,496	329	375	878
Total	**36,720**	**8,076**	**8,076**	**12,402**

22. Wellingborough needs to find a new sectoral focus to achieve these levels of growth.

Table A1.4.11 Wellingborough Twin Poles Scenarios

Wellingborough	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	194	76	97	72
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-96
Manufacturing	5,692	2,244	0	-9,354
Electricity, gas and water supply	5	2	13	10
Construction	1,436	566	0	-304
Wholesale, retail trade and repair	7,347	2,896	389	290
Hotels and restaurants	1,569	618	330	246
Transport, storage and communication	2,326	917	0	-1,786
Financial intermediation	668	263	110	82
Business Services	5,185	2,044	4,506	3,360
Public administration and defence	1,547	610	2,004	1,494
Education	2,127	838	2,406	1,794
Health and social work	2,361	931	2,714	2,024
Social and personal services	1,426	562	0	-576
Total	**31,884**	**12,568**	**12,568**	**-2,744**

23. Across North Northants as a whole there will need to be strong growth in the B space sectors of Business Services, Manufacturing and Distribution if these high levels of growth are to be achieved.

Table A1.4.12 North NorthantsTwin Poles Scenarios

North Northants	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	1,094	222	182	426
Fishing	0	0	0	0
Mining and quarrying	9	1	0	-146
Manufacturing	25,661	6,951	0	-27,500
Electricity, gas and water supply	122	30	114	220
Construction	5,899	1,492	676	1,238
Wholesale, retail trade and repair	27,495	7,393	5,387	12,594
Hotels and restaurants	6,174	1,617	571	378
Transport, storage and communication	9,648	2,674	4,552	4,726
Financial intermediation	1,546	447	141	-234
Business Services	16,488	4,522	6,822	10,058
Public administration and defence	3,856	1,156	3,217	3,656
Education	9,238	2,315	5,493	9,034
Health and social work	13,000	3,204	5,496	8,394
Social and personal services	5,160	1,338	711	1,182
Total	**125,390**	**33,364**	**33,364**	**24,026**

Northern Focus

24. The Northern Focus scenario essentially seeks to redistribute past growth that occurred in East Northants to Corby.

Table A1.4.13 Northern Focus Scenarios

	1998-2008	2011-31	1998-2008	2011-31
	Number	Number	% p.a.	% p.a.
Corby	-286	12,810	-0.1%	1.8%
East Northamptonshire	7,467	-889	3.3%	-0.2%
Kettering	6,202	12,901	1.9%	1.5%
Wellingborough	-1,371	104	-0.4%	0.0%
North Northants	12,012	24,926	1.0%	0.9%

25. This scenario poses the greatest challenge for Corby. A revival in manufacturing or very substantial growth in distribution would appear to be the only way this scenario can be realised.

Table A1.4.14 Corby Northern Focus Scenarios

Corby	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	20	9	0	-12
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-4
Manufacturing	8,956	3,879	0	-10,502
Electricity, gas and water supply	26	11	34	28
Construction	935	405	242	202
Wholesale, retail trade and repair	6,715	2,909	2,504	2,088
Hotels and restaurants	1,178	510	0	-190
Transport, storage and communication	3,645	1,579	5,833	4,864
Financial intermediation	169	73	0	-82
Business Services	3,307	1,432	0	-462
Public administration and defence	901	390	1,074	896
Education	1,642	711	1,888	1,574
Health and social work	1,257	544	967	806
Social and personal services	824	357	269	224
Total	**29,574**	**12,810**	**12,810**	**-570**

26. For East Northants the challenge would be to suppress all growth.

Table A1.4.15 East Northamptonshire Northern Focus Scenarios

East Northamptonshire	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	670	-22	-19	358
Fishing	0	0	0	0
Mining and quarrying	9	0	0	-38
Manufacturing	5,160	-169	0	-1,522
Electricity, gas and water supply	0	0	0	0
Construction	1,652	-54	-17	324
Wholesale, retail trade and repair	5,997	-196	-295	5,556
Hotels and restaurants	1,366	-45	0	-242
Transport, storage and communication	1,873	-61	-54	1,024
Financial intermediation	281	-9	-7	138
Business Services	3,462	-113	-198	3,732
Public administration and defence	438	-14	-20	370
Education	2,768	-90	-172	3,240
Health and social work	2,122	-69	-71	1,342
Social and personal services	1,414	-46	-35	656
Total	**27,212**	**-889**	**-889**	**14,938**

27. For Kettering the growth profile is fairly similar to the past. Past manufacturing losses need to be stabilised to compensate for lower growth from the health sector.

Table A1.4.16 Kettering Northern Focus Scenarios

Kettering	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	210	74	5	8
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-8
Manufacturing	5,853	2,056	0	-6,122
Electricity, gas and water supply	91	32	124	182
Construction	1,876	659	693	1,016
Wholesale, retail trade and repair	7,436	2,613	3,180	4,660
Hotels and restaurants	2,061	724	385	564
Transport, storage and communication	1,804	634	426	624
Financial intermediation	428	150	0	-372
Business Services	4,534	1,593	2,339	3,428
Public administration and defence	970	341	611	896
Education	2,701	949	1,656	2,426
Health and social work	7,260	2,551	2,881	4,222
Social and personal services	1,496	526	599	878
Total	**36,720**	**12,901**	**12,901**	**12,402**

28. For Wellingborough growth is static. An alternative way this could be achieved would be through growth in sectors such as business services and Wholesale and Retail offsetting continued losses in manufacturing.

TableA1.4.17 Wellingborough Northern Focus Scenarios

Wellingborough	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	194	1	1	72
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-96
Manufacturing	5,692	19	0	-9,354
Electricity, gas and water supply	5	0	0	10
Construction	1,436	5	0	-304
Wholesale, retail trade and repair	7,347	24	3	290
Hotels and restaurants	1,569	5	3	246
Transport, storage and communication	2,326	8	0	-1,786
Financial intermediation	668	2	1	82
Business Services	5,185	17	37	3,360
Public administration and Defence	1,547	5	17	1,494
Education	2,127	7	20	1,794
Health and social work	2,361	8	22	2,024
Social and personal services	1,426	5	0	-576
Total	**31,884**	**104**	**104**	**-2,744**

29. For North Northants as a whole this scenario is fairly similar to Core Strategy Plus. Whilst the overall totals are virtually identical Northern Focus has greater growth in manufacturing

under Scenario a. Under Scenario b the Northern Focus has higher growth in Transport storage and communications and lower growth in Business services.

Table A1.4.18 North Northants Northern Focus Scenarios

North Northants	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	1,094	62	-13	426
Fishing	0	0	0	0
Mining and quarrying	9	0	0	-146
Manufacturing	25,661	5,785	0	-27,500
Electricity, gas and water supply	122	43	158	220
Construction	5,899	1,015	918	1,238
Wholesale, retail trade and repair	27,495	5,350	5,392	12,594
Hotels and restaurants	6,174	1,194	388	378
Transport, storage and communication	9,648	2,160	6,204	4,726
Financial intermediation	1,546	216	-6	-234
Business Services	16,488	2,929	2,179	10,058
Public administration and defence	3,856	722	1,683	3,656
Education	9,238	1,577	3,391	9,034
Health and social work	13,000	3,034	3,799	8,394
Social and personal services	5,160	842	833	1,182
Total	**125,390**	**24,926**	**24,926**	**24,026**

Northampton Focus

30. Northampton Focus has the most modest growth of all the scenarios at the North Northants level. With employment growth at 0.7% p.a. this still represents a good growth rate in national terms. Only Corby is expected to grow above this rate at an average of 1.1% p.a.

Table A1.4.19 Northampton Focus Scenarios

	1998-2008	2011-31	1998-2008	2011-31
	Number	**Number**	**% p.a.**	**% p.a.**
Corby	-286	6,997	-0.1%	1.1%
East Northamptonshire	7,467	1,202	3.3%	0.2%
Kettering	6,202	5,755	1.9%	0.7%
Wellingborough	-1,371	4,728	-0.4%	0.7%
North Northants	12,012	18,682	1.0%	0.7%

31. For Corby this scenario is virtually identical to Core Strategy Plus.

Table A1.4.20 Corby Northampton Focus Scenarios

Corby	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	20	5	0	-12
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-4
Manufacturing	8,956	2,119	0	-10,502
Electricity, gas and water supply	26	6	18	28
Construction	935	221	132	202
Wholesale, retail trade and repair	6,715	1,589	1,368	2,088
Hotels and restaurants	1,178	279	0	-190
Transport, storage and communication	3,645	862	3,186	4,864
Financial intermediation	169	40	0	-82
Business Services	3,307	782	0	-462
Public administration and defence	901	213	587	896
Education	1,642	388	1,031	1,574
Health and social work	1,257	297	528	806
Social and personal services	824	195	147	224
Total	**29,574**	**6,997**	**6,997**	**-570**

32. For East Northants growth targets are low and we would expect them to be surpassed.

Table A1.4.21 East Northamptonshire Northampton Focus Scenarios

East Northamptonshire	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	670	30	26	358
Fishing	0	0	0	0
Mining and quarrying	9	0	0	-38
Manufacturing	5,160	228	0	-1,522
Electricity, gas and water supply	0	0	0	0
Construction	1,652	73	23	324
Wholesale, retail trade and repair	5,997	265	399	5,556
Hotels and restaurants	1,366	60	0	-242
Transport, storage and communication	1,873	83	74	1,024
Financial intermediation	281	12	10	138
Business Services	3,462	153	268	3,732
Public administration and defence	438	19	27	370
Education	2,768	122	233	3,240
Health and social work	2,122	94	96	1,342
Social and personal services	1,414	62	47	656
Total	**27,212**	**1,202**	**1,202**	**14,938**

33. For Kettering the jobs targets are relatively modest and attainable given past performance. If growth is not forthcoming in health then the gap should be able to be made up in Business services.

Table A1.4.22 Kettering Northampton Focus Scenarios

Kettering	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	210	33	2	8
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-8
Manufacturing	5,853	917	0	-6,122
Electricity, gas and water supply	91	14	55	182
Construction	1,876	294	309	1,016
Wholesale, retail trade and repair	7,436	1,165	1,419	4,660
Hotels and restaurants	2,061	323	172	564
Transport, storage and communication	1,804	283	190	624
Financial intermediation	428	67	0	-372
Business Services	4,534	711	1,044	3,428
Public administration and defence	970	152	273	896
Education	2,701	423	739	2,426
Health and social work	7,260	1,138	1,285	4,222
Social and personal services	1,496	234	267	878
Total	**36,720**	**5,755**	**5,755**	**12,402**

34. For Wellingborough the target should be attainable even though it would represent a considerable improvement on past performance. The growth targets can be achieved with modest growth across a range of sectors.

Table A1.4.23 Wellingborough Northampton Focus Scenarios

Wellingborough	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	194	29	36	72
Fishing	0	0	0	0
Mining and quarrying	0	0	0	-96
Manufacturing	5,692	844	0	-9,354
Electricity, gas and water supply	5	1	5	10
Construction	1,436	213	0	-304
Wholesale, retail trade and repair	7,347	1,089	146	290
Hotels and restaurants	1,569	233	124	246
Transport, storage and communication	2,326	345	0	-1,786
Financial intermediation	668	99	41	82
Business Services	5,185	769	1,695	3,360
Public administration and defence	1,547	229	754	1,494
Education	2,127	315	905	1,794
Health and social work	2,361	350	1,021	2,024
Social and personal services	1,426	211	0	-576
Total	**31,884**	**4,728**	**4,728**	**-2,744**

35. For Northants as a whole this is this most easily realised target and does not put too much pressure on any sector to deliver.

Table A1.4.24 North Northants Northampton Focus Scenarios

North Northants	2008	2011-31 a	2011-31 b	Past Growth
Agriculture, hunting and forestry	1,094	97	64	426
Fishing	0	0	0	0
Mining and quarrying	9	0	0	-146
Manufacturing	25,661	4,108	0	-27,500
Electricity, gas and water supply	122	21	79	220
Construction	5,899	801	465	1,238
Wholesale, retail trade and repair	27,495	4,108	3,332	12,594
Hotels and restaurants	6,174	895	296	378
Transport, storage and communication	9,648	1,573	3,450	4,726
Financial intermediation	1,546	218	51	-234
Business Services	16,488	2,415	3,007	10,058
Public administration and defence	3,856	613	1,640	3,656
Education	9,238	1,248	2,907	9,034
Health and social work	13,000	1,879	2,931	8,394
Social and personal services	5,160	702	461	1,182
Total	**125,390**	**18,682**	**18,682**	**24,026**

APPENDIX 2

Employment Change Table

Table A2.1 Employment Change 2008-2010

Industry	Corby	East Northants	Kettering	Wellingborough	East Midlands	Great Britain
Agriculture, forestry & fishing	-10	-30	-11	-23	-1,759	-20,528
Mining, quarrying & utilities	-36	41	-89	1	651	35,749
Manufacturing	-1,008	-56	-737	42	-6,143	-235,477
Construction	-29	-391	-479	-170	-21,228	-217,498
Motor trades	-57	429	-125	-138	-1,035	-19,466
Wholesale	-213	-331	487	-77	-4,784	-47,300
Retail	283	-425	-414	-197	-18,764	-122,952
Transport & storage (inc postal)	-128	467	547	259	7,689	-65,017
Accommodation & food services	-217	-216	-309	-383	-14,288	-83,952
Information & communication	-292	-70	-62	-725	-3,057	-40,318
Financial & insurance	-21	32	-118	-258	-11,337	-98,011
Property	-6	-148	-59	-39	-1,869	-22,615
Professional, scientific & technical	-98	-197	302	-85	-5,331	-27,868
Business administration & support services	-230	87	95	547	-3,351	-179,552
Public administration & defense	33	-12	-33	-137	5,880	72,692
Education	210	-93	-393	608	10,812	1,330
Health	127	-35	632	-60	12,018	196,636
Arts, entertainment, recreation & other services	171	2	-118	-203	1,811	-33,322
Total	**-1,518**	**-948**	**-882**	**-1,042**	**-54,084**	**-907,469**