Northamptonshire Strategic Employment Land Assessment

Final Report

November 2009

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Preamble

Atkins Ltd in association with Lambert Smith Hampton and Nortoft ltd were commissioned in November 2008 to prepare the Strategic Employment Land Assessment (SELA) for Northamptonshire on behalf of Northamptonshire Enterprise Ltd (NEL) following a full and open competitive tender procedure.

This study builds on a substantial body of work which has already been undertaken to inform future strategic economic and employment land policies and priorities in the county. This includes, but not by way of exclusion, the Northamptonshire Commercial Property and Employment Land Assessment studies (CoPELA 2003 and 2006), North Northamptonshire Joint Planning Unit Employment Land Futures (2005) and Northampton Employment Land Study (2006). These studies collectively set out a range of analyses of future employment floor-space demand and supply requirements for the county based on core MKSM aims and objectives. In addition, the Strategic [Sustainable] Northamptonshire Economic Action Plan (SNEAP) issued in February 2008 established a preferred economic vision for the county. This set out aspirational employment targets for North and West Northamptonshire for the periods up to 2021 and 2026. For the period 2001-2021, the aim is to provide an additional 47,400 jobs in North Northamptonshire (as adopted in the Core Spatial Strategy) and 53,000 additional jobs in West Northamptonshire. The NEL brief stipulated the following requirements of the SELA:

- Assess the Northamptonshire commercial property market.
- Evaluate the range of employment forecasts for the area and the underlying assumptions, in line with planning policy.
- Evaluate current employment land allocations in relation to commercial market demands and strategic priorities.
- Identify measures required to ensure that an appropriate range of employment sites are made available to meet employment forecast requirements.
- Identify strategic site policies and potential sites for growth in line with adopted and emerging Core Spatial Strategies (CSSs) with a particular focus on differing requirements from planning bodies (e.g. Strategic Distribution Sites).
- Provide a single strategic employment land assessment framework for use by local, county and regional partners.
- Provide guidance on monitoring, review, and how outcomes can be rolled forward to 2031.

Methodology

As laid out in the Government's Employment Land Review Guidance note, a number of distinct areas of activity have been undertaken as part of the process of producing a Strategic Employment Land Review. These include:

- Identifying a preferred econometric model for future job growth in Northamptonshire and the county's Housing Market Areas.
- Examining and recommending on the quantum of future development land required to facilitate Northamptonshire's growth requirements.
- Providing a detailed overview of current commercial market conditions affecting Northamptonshire.
- Supporting the regional and county evidence base for economic and planning policy.
- Identifying key strategic sites and policies for growth in line with adopted and emerging planning guidance.

- Providing guidance on monitoring and review, and how jobs growth can be achieved through employment land delivery.

Consultation Response

A range of consultations have taken place throughout the study period. These included an open 'Call for Sites' process, an unrestricted six week consultation period for consideration of the draft report and four stakeholder workshops for both public and private partners. These consultations led to a range of responses from public and private partners on strategic and site specific issues. Responses of a general nature have been positive regarding SELA. Given the study's strategic nature, site specific information provided in SELA does not equate to the full details required for formal site allocations in the development plan making process. Whilst statutory bodies such as the Highways Agency and Environment Agency have been consulted during the study, this does not replace any formal requirements of local authorities to engage with statutory consultees as part of the plan making and application process. Consequently, any comments concerning sites in the SELA will need to be thoroughly tested through the formal planning process when detailed site information should be made available to ensure compliance with the requirements of these agencies and wider planning partners.

Employment Land Reviews (ELRs)

The purpose of the SELA is to provide an evidence base to assist in informing planning and economic development policy in Northamptonshire. It will provide plan making authorities in the County with an objective and single source of information on which to draw, as appropriate as they develop LDF policies. The use, or not of the evidence base should be justified in preparing an LDF. The SELA ensures that a common evidence base is available to plan makers.

The SELA is compliant with Government's ELR Guidance with a primary role being to identify key employment sites that have a reasonable prospect of being deliverable and developable subject to overcoming relevant physical and policy constraints and being tested through the full planning system. The SELA operates at a sub-regional level and focuses on the identification of potential B-use employment sites or locations. As a consultancy document, it does not determine whether or not specific sites should be allocated for B-use employment purposes. However, it provides an evidence base including a list of potential sites which can be taken forward for 'next stage evaluation' by plan making authorities as part of the formal plan making and planning application process.

Compliance with ELR "Guidance Note" Requirements

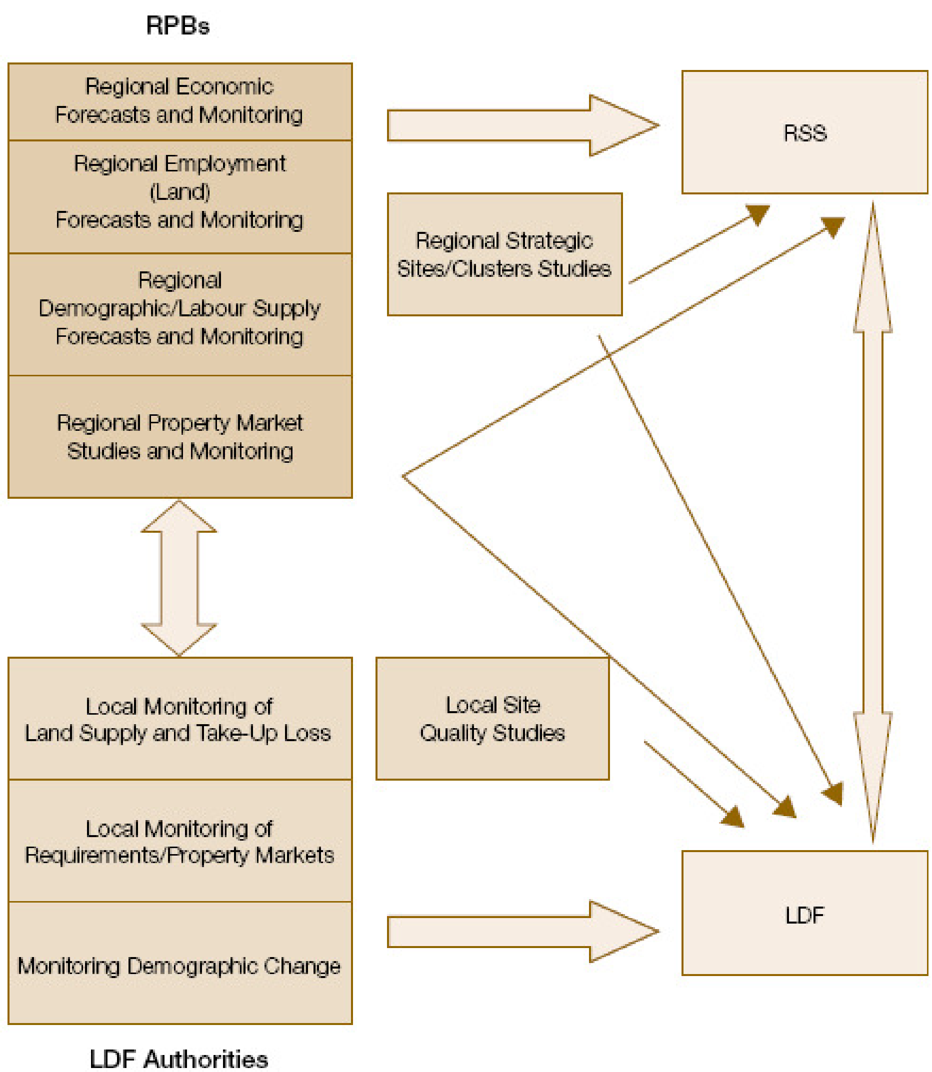
The SELA takes a strategic approach to identifying future needs for employment land and jobs growth. In particular, it supports the "RPB" section of the hierarchy depicted in Figure ES1 as set out in the Government's Guidance Notes on ELRs. The SELA is a study categorised as "*Regional Strategic Site/Cluster Study*" (see Figure ES1), albeit disaggregated to the sub-regional level (i.e. Northamptonshire). As a sub-regional study, it does not replace the detailed local Employment Land Reviews (ELRS), required from LDF local authorities, but seeks to support the strategic planning policy direction for the County and its constituent authorities. Paragraph 2.25 of the Employment Land Review Guidance Note states:

"*At the regional level, for example, there will be a far greater focus on economic and employment forecasts and aggregate supply and, apart from regionally important locations, far less concern about the attributes of individual sites*."

In development of LDFs and having regard to the findings and recommendations of the SELA, it remains a requirement for local authorities to undertake detailed ELRs, categorised as "*Local Site Quality Studies*" in Figure ES1. A number of the sites identified in the SELA study are classified as "unconstrained", being already allocated or are contained within adopted Development Plan Documents and saved Local Plan allocations. In development of their LDFs, consideration should also be given by LDF local authorities to any significant losses or gains which may impact on the supply position in their local authority areas. The SELA supports a number of requirements set out in Government's ELR Guidance particularly focusing on regional, strategic and cluster issues (see Figure ES1).

The Guidance Note on ELRs highlights the limitations of forecasting future business and employment needs at the level of individual local authorities. It stresses the most appropriate boundaries for any aggregate analysis of demand and supply should reasonably reflect the geographical markets in which businesses operate. In this report, the primary areas used are those defined as North Northamptonshire and West Northamptonshire as both travel-to-work and Housing Market Areas. In practice the County as a whole provides an equally important spatial unit for analysis given the significance of economic and functional links between the two Housing Market Areas. It is recognised that there are also smaller level functional geographies within Northamptonshire which should be considered by local partners in plan making.

Figure ES1: Economic and Employment Land Review Hierarchy



Note: The regional level forecasting should be disaggregated to sub-regional levels, where appropriate.

Source: Employment Land Reviews: Guidance Notes (ODPM, 2004)

Clusters

In addition to setting out a preferred economic scenario for growth and the quantum of development needed, the SELA considers a number of key employment clusters in the County. These are identified as key sectors in the report, including: High Performance Engineering and Motor sport: Environmental Technologies; and Distribution. A range of sector plans are being prepared by NEL, the emerging implications of which have been considered in this report. The High Performance Engineering and Motor Sports sector in Northamptonshire is considered to be of regional significance. Environmental Technologies is another major sector which is being targeted throughout the County as a means of attracting new business investment. This is a broad ranging sector with diverse needs in terms of sites and premises. This includes waste management activities, the preferred sites and locations for which are being identified through the Northamptonshire Minerals and Waste Development Framework (MWDF). Local partners should work together to maximise the economic impact of the sector in terms of opportunities to provide supporting B use (notably B2 and B1c) sites, which may benefit from agglomeration effects.

Future Employment Needs

Building on the substantial body of existing forecasting work and analysis of actual economic performance of the county since 2001, a series of employment growth scenarios for the County have been created and evaluated in this study: -

- Dwellings and population led scenario.
- Econometric / Trend based scenario (Tempro v5.4).
- Policy Scenario.

The purpose of the analysis was to test a range of potential growth options for Northamptonshire and its constituent areas, whilst avoiding duplication of work that has already been undertaken. After testing the three assessments and initial consultation with key stakeholders, a 'preferred-scenario' was identified. This rolls forward the SNEAP preferred economic vision and is summarised below in Tables ES2 (jobs growth) and ES3 (B use floor-space requirements).

Table ES2 – Job Growth - Employment Forecasts 2001-2031 – Preferred Policy Scenario (FTEs)

	2001-26	2001-31
North Northamptonshire		
Industrial	*2,418*	*2,902*
Warehousing	*8,687*	*10,424*
Office	*21,684*	*26,021*
B Space Jobs	32,788	39,346
Non B Jobs	31,330	37,596
All Jobs	**64,118**	**76,942**
% of B Space Jobs	*51.1*	*51.1*
West Northamptonshire		
Industrial	*-2,930*	*-3,516*
Warehousing	*9,726*	*11,671*
Office	*25,526*	*30,631*
B Space Jobs	32,322	38,786
Non B Jobs	35,797	42,956
All Jobs	**68,119**	**81,743**
% of B Space Jobs	*47.4*	*47.4*
Northamptonshire		
Industrial	*-512*	*-614*
Warehousing	*18,412*	*22,094*
Office	*47,210*	*56,652*
B Space Jobs	*65,110*	*78,132*
Non B Jobs	67,126	80,551
All Jobs	**132,237**	**158,684**
% of B Space Jobs	*49.24*	*49.2*

Table ES3– B-Use Floor-space Requirements 2001-2031 – Preferred Policy Scenario (sqm)

	2001-26	2001-31
North Northamptonshire		
Industrial	*84,630*	*101,556*
Warehousing	*764,456*	*917,347*
Off ice	*390,312*	*468,374*
Total B Floor-space	**1,239,398**	**1,487,278**
West Northamptonshire		
Industrial	-102,550	-123,060
Warehousing	855,888	1,027,066
Off ice	459,468	551,362
Total B Floor-space	**1,212,806**	**1,455,367**
Northamptonshire		
Industrial	-17,920	-21,504
Warehousing	1,620,344	1,944,413
Off ice	849,780	1,019,736
Total B Floor-space	**2,452,204**	**2,942,645**

The three key scenarios were created using different techniques and assumptions:

- **Dwellings and population led scenario**: This estimates the job growth requirements that would emerge if the county seeks to plan for a balance between planned housing and employment change.
- **Econometric / Trend based scenario (Tempro v5.4):** This estimates employment change likely to occur without major policy intervention. Based on existing industrial structures and historical trends.
- **Policy Scenario:** This scenario was established by the SNEAP preferred economic scenario. The only change that has been made has been to roll forward the employment growth estimates to 2031

Demand-Supply Balance

Initially a call for information on existing planning allocations and potential sites promoted by the public sector was undertaken. An open and transparent 'Call for Sites' process promoted by private developers and land owners was then undertaken to assess the potential supply of employment land in the County. Based on these, an objective and comprehensive market based assessment was conducted for all sites including those identified from other sources.

Tables ES4 (North Northamptonshire) and ES5 (West Northamptonshire) summarise the potential gross existing and potential capacity of all sites. These capacity assessments are categorised according to whether or not a strong planning status is evident ('unconstrained) or not ('constrained'). A site was considered to be constrained in planning terms if the site is not identified as allocated for employment uses in existing local plans nor has any existing planning approval specifically related to employment uses. For each category of site, a composite assessment of commercial quality was undertaken, measured by local commercial agents using an objective standardised scoring system. This was then tabulated into two categories ('high quality' and 'poorer' quality).

Table ES4 – Gross Existing and Potential Supply Capacity – North Northamptonshire (sqm)

	Office (sqm)	Industrial (sqm)	Distribution (sqm)
Constrained Land	**1,314,756**	**2,689,514**	**2,057,110**
High Quality	326,971	643,741	589,639
Poorer Quality	987,785	2,045,773	1,467,472
Unconstrained Land	**118,036**	**319,237**	**85,070**
High Quality	98,436	159,603	40,496
Poorer Quality	19,600	159,634	44,574
Total	**1,432,791**	**3,008,751**	**2,142,180**

Table ES5 - Gross Existing and Potential Supply Capacity – West Northamptonshire (sqm)

	Office (sqm)	Industrial (sqm)	Distribution (sqm)
Constrained Land	**879,134**	**1,283,638**	**1,765,749**
High Quality	225,993	107,643	941,747
Poorer Quality	653,141	1,175,995	824,003
Unconstrained Land	**188,467**	**228,787**	**357,623**
High Quality	173,507	193,123	353,623
Poorer Quality	14,960	35,664	4,000
Total	**1,067,601**	**1,512,425**	**2,123,372**

Tables ES6 (North Northamptonshire) and ES7 (West Northamptonshire) set out the net balance between demand and existing / potential supply at 2026 and 2031. The quantitative analysis of net balance has been undertaken having regard only to sites which are unconstrained in planning terms and categorised in terms of their composite quality and suitability for employment.

Monitoring

In implementing the recommendations of the SELA and in moving forward towards meeting the established jobs growth targets, the need for an effective monitoring system is essential. In addition to monitoring employment land, it is important that partners such as the JPUs, local authorities, delivery vehicles and NEL work together to support the provision of a collective economic monitoring system.

Forward forecasting using appropriate charts which have been standardised with others in MKSM will be an essential tool for monitoring progress against national, regional and sub-regional objectives.

Table ES6 – Demand-Supply Balance: North Northamptonshire (sqm)

	Offices (sqm)	Industrial (sqm)	Warehousing (sqm)	Total (sqm)
Demand 2001-2026	390,312	84,630	764,456	1,239,398
Demand 2001-2031	468,374	101,556	917,347	1,428,278
Take up 01-08	30,000	-160,000	792,000	662,000
NET demand 08-2026	360,312	244,630	-27,544	577,398
Net demand 08-2031	438,374	261,556	125,347	825,277
High quality supply without planning or other major constraints	98,436	159,603	40,496	298,534
Net Balance to 2026	261,877	85,027	-68,040	278,864
Net Balance to 2031	339,939	101,953	84,852	526,744
Total high quality supply from all sites assessed (regardless of constraints)	425,406	803,344	630,134	1,858,884
Net Balance to 2026	-65,094	-558,714	-657,678	-1,281,486
Net Balance to 2031	12,968	-541,788	-504,787	-1,033,607

Table ES7 - Demand-Supply Balance: West Northamptonshire (sqm)

	Offices (sqm)	Industrial (sqm)	Warehousing (sqm)	Total (sqm)
Demand 2001-2026	459,468	-102,550	855,888	1,212,806
Demand 2001-2031	551,362	-123,060	1,027,066	1,455,367
Take up 01-08	17,000	-140,000	679,000	556,000
NET demand 08-2026	442,468	37,450	176,888	656,806
Net demand 08-2031	534,362	16,940	348,066	899,367
High quality supply without planning or other major constraints	173,507	193,123	353,623	720,252
Net Balance to 2026	268,961	-155,673	-176,735	-63,446
Net Balance to 2031	360,855	-176,183	-5,557	179,115
Total high quality supply from all sites assessed (regardless of constraints)	399,500	300,765	1,295,369	1,995,635
Net Balance to 2026	42,968	-263,315	-1,118,481	-1,338,829
Net Balance to 2031	134,862	-283,825	-947,303	-1,096,268

Demand-Supply Commentary

North Northamptonshire

There is a significant net shortfall of existing unconstrained capacity for offices under the two supply estimates. There is limited capacity for warehousing development, particularly up to 2031. Moreover, it is important to highlight that the capacity assessments do not make an allowance for choice and flexibility in the supply of sites to meet the future needs of the County. In order to meet the identified shortfall in offices and warehousing, a significant quantity of good quality land will need to be identified and brought forward for development. Locations on the "next stage evaluation" list are available to be considered and tested through the planning process for primarily employment purposes. A summary of the list is set out at the end of this Executive Summary.

Further to this, it is recognised that there is also a potential further 'pipeline' of floor-space that currently may be being considered through the planning process including approvals that have been decided by committees, but have not yet been implemented. Initial estimates indicate that some hundreds of thousands of square metres of commercial space remain in this position. Partners should continue to work on effective monitoring activities to reconcile this data with the supply estimates provided in the SELA. Subject to a reasonable degree of certainty regarding the likelihood of such proposals being implemented, it may be necessary to take these into consideration when updating the supply estimates set out in this report.

West Northamptonshire

A similar pattern to that in North Northamptonshire is identifiable in terms of offices. This sector demonstrates a significant net shortfall of existing unconstrained supply capacity before any consideration is given to the need for choice, flexibility and risk. Whilst theoretically, forecast demand for warehousing has already been met largely by take-up since 2001, there is an underlying need to ensure that future plans for expanding employment in the area is not constrained to the extent that a large proportion of latent market demand is 'pushed' away from the county. This is particularly important for key distribution locations in the area such as Daventry (DIRFT) where significant, sustainable opportunities for future growth remain. Moreover, it is critical to emphasise that the capacity summaries presented in the tables above assume a 'best-case scenario' whereby all available, unconstrained sites are made available for development. In reality, this will not be the case for a variety of unforeseen reasons and action must be taken to remedy existing short term supply constraints in the county: this reinforces the need to plan for choice and flexibility through the provision of a greater amount of land and floor-space over and above future estimates of actual demand. . Locations on the "next stage evaluation" list are available to be considered and tested through the planning process for primarily employment purposes. A summary of the list is set out at the end of this Executive Summary

As in North Northamptonshire, it is recognised there is a potential further 'pipeline' supply of floor-space that may currently be being dealt with through the planning process including approvals not yet implemented. Initial estimates indicate that within West Northamptonshire in general and within the three Urban Development Areas in particular, hundreds of thousands of square metres remain in this position. Subject to a reasonable degree of certainty regarding the likelihood of such proposals being implemented, it may be necessary to take these into consideration when updating the supply estimates set out in this report.

Northamptonshire

As a whole, the above analysis demonstrates that both North and West Northamptonshire have insufficient, good quality, unconstrained supply capacity to provide for projected demand for office floor-space. The supply of available, good quality industrial land in the North is also limited. Given the high level of take-up of warehousing space in recent years, a high proportion of forecast demand has already been satisfied. However, this may indicate that future estimates of warehousing demand are below market requirements. Irrespective of this, in pursuing a balanced role in the distribution and warehousing market, additional land for this use will need to be made available in Northamptonshire. The tables above highlight that the national B8 market has a significant impact on both the demand and supply analysis for Northamptonshire (both West and North).

Historically, demand in Northamptonshire has far exceeded forecast levels, as indicated by the Valuation Office Agency data on B8 take up from 2001 to 2008 which was recorded as some 1,471,000sqm compared to a total SELA B8 floor-space forecast to 2026 of 1,620,344.

There are clearly forces at work within the national B8 market which indicate a level of latent demand over and above the trends projected in the SELA and SNEAP. The SELA highlights the varied nature of local and national B8 activities. Consequently, careful consideration must be given to providing a sustainable balance of B8 accommodation which can service these differing needs and size requirements whilst ensuring the future economic well-being of the County. This must further be balanced with the need to meet the strategic policy priorities of creating high value-added jobs and supporting high quality, environmentally sustainable development.

Existing Employment Sites

It is also important to recognise that a considerable amount of employment floor-space is already provided by existing sites and premises. In light of the strategic policy requirement for Northamptonshire to support significant employment growth and the SELA findings regarding the need for further employment land allocations to meet this requirement, it is recommended as a general principle that, unless there is a clear requirement for existing employment land allocations to be lost, local authorities are encouraged to adopt a policy that existing employment sites should not be released for alternative uses. Where existing employment sites are being considered for release to other uses, the case should be supported by strong evidence of need for the alternative use relative to employment needs. This evidence should take into account vacancy data for specific local areas and, if relevant, the needs of key employment sectors.

Conclusions and Policy Considerations

Key Policy Drivers

In planning for economic development, the consultation paper on PPS4 specifies a need for local authorities to take a proactive and flexible approach. This is important to ensure that local authorities can respond quickly and efficiently to changing business needs. The policy guidance calls for local authorities to allocate a range of sites and to plan for a broad range of business types. This is also reflected in the East Regional Spatial Strategy and Regional Economic Strategy. Together these will form a Regional Plan, (the East Midlands Plan). The East Midlands Plan will expect employment allocations to be responsive to market needs and requirements of potential investors (including small businesses). These allocations should also provide for the needs of priority sectors identified in the RES and should provide a catalyst for the regeneration of urban areas. Such principles have guided this study throughout.

East Midlands Plan

The East Midlands Plan highlights the importance of Northampton's role as a Principal Urban Area in driving growth in the County through both housing and employment development. This needs to be complemented by enhancement of public transport infrastructure and facilities. The tightness of the town's boundaries dictates that a strategic and coordinated approach needs to be taken to the planning and delivery of this longer term growth. This plan also highlights that the regeneration of Corby should be supported by a level of housing development that will significantly reduce the need for in-commuting. Other Growth Towns, such as, Kettering and Wellingborough will also be enhanced, as will Daventry in its role as a Sub-Regional Centre. Policy 21 of the RSS establishes the potential for provision of strategic distribution sites in Northamptonshire. It stipulates North and West Northamptonshire among the preferred locations for these sites. In allocating sites in Local Development Documents, policy dictates that local authorities should give priority to sites which can be served by rail freight and operate as inter-modal terminals.

MKSM Sub-Regional Spatial Strategy

The MKSM sub-regional spatial strategy aims to provide high-value economic growth commensurate with planned housing development. Over the 30 year period to 2031, the strategy plans for provision of up to 141,000 additional jobs in Northamptonshire.

SNEAP builds on MKSM strategy and sets out a preferred economic vision for Northamptonshire, focused on raising productivity and accelerating employment growth in a range of business sectors. For North Northamptonshire, the SNEAP aim is to achieve a step-change in the ability to deliver a planned number of 47,400 jobs for the period 2001-2021. For West Northamptonshire, the aim is to achieve jobs growth of 53,000 over the same period. These job 'targets' are becoming widely accepted in the county as the basis for strategic policy development. SNEAP emphasises that without significant interventions from the public sector, the county will fall short of the job growth 'targets' which form part of the preferred economic vision.

Core Spatial Strategies

The adopted Core Spatial Strategy in North Northamptonshire establishes the spatial vision for development of this part of the County. This strategy takes forward key aspects of the East Midlands Plan in North Northamptonshire. It plans for growth through the development of a strong network of settlements linked by good transport connections and emphasises the importance of matching housing growth with economic growth. In considering the planned total of 47,400 new jobs to be provided in the period up to 2021, the Core Strategy identifies that 23,590 of these will be B-use jobs and allocates these on a district by district basis as targets. The pre-submission West Northamptonshire Joint Core Strategy is in the course of preparation and will need to take policy decisions informed by the information provided in the SELA.

Infrastructure Constraints including the Strategic Road Network

The SELA has assessed employment sites against a range of criteria, but it is clear that further evaluation will be required in meeting the requirements of the formal planning system. Inevitably, the development of sites will have impacts on infrastructure capacity. Consequently, in order to ensure sites are taken through the planning process in a timely and efficient manner, promoters should seek early engagement with the relevant statutory agencies.. This should be the case for all strategic planning partners, including the Highways Agency, Environment Agency, English Heritage and others to ensure that the detailed requirements of these bodies are fully considered as part of the formal planning process.

It should be highlighted that sites recommended in this document for 'next stage evaluation' have not been accepted in terms of the ability of the Strategic Road Network (SRN) to accommodate trips generated by proposed sites. In particular, a number of sites will have a direct impact on the SRN and this will need to be fully investigated. Any site coming forward will require full supporting evidence, in particular a Transport Assessment and Travel Plan produced in compliance with the latest standard, currently DFT Circular 02/2007, the "Guidance on Transport Assessment" and the "Good Practice Guidelines: Delivering travel plans through the planning system".

Flexibility and Choice

As a growth area with the need to achieve ambitious employment and housing development targets, we consider that the need for flexibility and a proactive planning approach is imperative if the county is to fulfil its contribution to the growth agenda. Moreover, such an approach is equally important if adopted and other endorsed strategies in the county are to be realised. In planning for future employment land supply, and in accordance with Government Guidance, spatial units should be used which make sense in terms of functional economic geography. In order to ensure that these functional areas can be translated into administrative areas, there is an objective rationale to indicate that demand and supply estimates are provided primarily for North Northamptonshire and West Northamptonshire.

Phasing of Development Land Release

In achieving long term growth aspirations, the county is expected to seek to maximise demand-led supply through promoting the area positively as a location for business. However, a long term goal is to ensure a balance of speculative and end-user demand as the county grows. Key centres such as Northampton need to develop further the promotion and image of the town as a viable, national centre of commerce ideally placed to attract footloose investment.

This should be reflected, in part, by ensuring a healthy supply of high quality and readily available land. In delivering employment land opportunities, local partners should give careful consideration to the release of development land and phasing of construction to ensure that the efficiency of the market is not undermined through excessive supply at any one time. This will be important to ensure that optimum development values can be maintained in order to support long term developer interest in the county.

Rural Economic Development

In providing a healthy balance of employment across the county, we consider that the provision of new employment uses in rural areas should be encouraged so long as they support local needs at a scale commensurate with the character and environment of the area in question. Particular emphasis should be given to the promotion of sustainable sites in the centre of rural towns and, in some cases villages, where highlighted in policy as Rural Service Centres.

Industrial Employment Land

This study reflects national trends in respect of the ongoing decline of the manufacturing sector. Across the county, a large element of manufacturing activities are located in dated buildings, the majority of which are approaching 30 years old and obsolescence is becoming a significant issue. However, our assessment of local commercial property markets highlights the continuing demand for a range of industrial users for modern high quality premises in Northamptonshire. Furthermore, Tables B2 (North) and B3 (West) of SNEAP show the Cambridge Econometrics' sector forecasts which identify high relative growth in some manufacturing and industrial sectors. This may indicate that some industrial sectors in Northamptonshire outperform regional and national trajectories. Building on the existing strengths of key industrial activities, NEL are targeting key sectors which have the potential to support further jobs growth and facilitate innovation. These include High Performance Engineering and Motor sports and Environmental Technologies. In planning to meet the needs of industrial occupiers and investors, including the target sectors, it is critical that the quantitative balance between demand and supply does not detract from the practicalities of providing suitable sites and premises in response to the day-to-day needs of existing and potential industrial businesses.

Established Spatial Priorities

In accordance with established spatial priorities in the county, drawn from Regional and local policy, it is appropriate that local development documents promote employment growth according to the following hierarchy of locations. As noted in SNEAP, a key objective is regenerating the town centres. Given Northamptonshire's strategic role as a Growth Area, this hierarchy of settlements should preferably be reflected by public investment in key infrastructure and other facilities to ensure the respective roles of the county's settlements can be maintained and enhanced:

- <u>Principal Urban Area</u> – Northampton Implementation Area (i.e. functional area of Northampton). The county town currently has a population of around 200,000 with MKSM / SNEAP aspirations to grow to approximately 300,000 over the next 20 years.
- <u>Growth Towns</u> – Corby; Kettering; Wellingborough. Each of the towns have populations of between 60,000 – 75,000 including adjacent urban areas with expansion targets to around 100,000.
- <u>Sub-Regional Centres</u>– Daventry, with a population of around 25,000 should roughly double over 20 years. Rushden could be considered equivalent to a sub-regional centre. Each has a master plan which demonstrates their potential to perform an increasing employment role in the county.
- <u>Smaller Towns</u> – Burton Latimer; Rothwell; Desborough; Irthlingborough; Higham Ferrers; Towcester. Promotion of economic growth at a sustainable scale, primarily through regeneration of the town centres and provision of smaller scale urban extensions containing employment sites.

- Rural Service Centres – Brackley; Oundle; Thrapston; Raunds. Focus on town centre regeneration. In some cases, the promotion of key employment sites where viable as part of smaller scale urban extensions.
- Sector Specific Locations - (e.g. Motor sport) – Silverstone; Rockingham; Brixworth. Where significant sector-specific opportunities are apparent, these should be promoted through the identification of good quality viable employment sites that meet specific sector needs in the key locations.
- Road/Rail Transfer Hubs – Promoting strategic logistics hubs in sustainable locations, most notably Daventry International Rail Freight Terminal (DIRFT) and Eurohub, Corby. This reflects the unique role of these facilities. In particular, DIRFT, given its unique role in the national B8 market should be distinguished from the wider economic role of Daventry district and Daventry town.
- Passenger Rail Stations – Promoting mixed-use development in sustainable, town centre locations. Critical to this will be the need for strong intervention and co-ordinated action. Key locations may include Northampton, Corby, Kettering, Wellingborough, Long Buckby and Kings Sutton.

Town Centres

All boroughs and districts in the county have a range of town centre redevelopment opportunities and sites emerging for commercial development. In line with the SNEAP and wider policy objectives, prioritising these sites for development will be important in underpinning town centre regeneration and ensuring that attractive and vibrant town centres can support sustainable jobs growth. As such it is recommended that local partners continue to work closely together in bringing forward town centre sites which can accommodate a range of B and non B uses.

B-Use/non B-use Balance

The findings set out in this report indicate that, to date, the county has not met overall annualised MKSM total employment growth targets (particularly in the North). However, on closer examination, performance within the B-use sector has been much stronger compared to non B-use jobs growth. Indeed, growth of B-use jobs in Northamptonshire significantly out-performs the regional and national averages.

Consequently, an important policy consideration will be whether to plan a more prominent role for B-use activities in meeting the preferred growth scenario. Evidence discovered in preparing this report suggests that the county's non B-use sectors, (including but not exclusively retail, hotels, leisure, food and drink, social care, health, education and non residential institutions), are lagging behind regional and national trends. This suggests a significant shift in policy initiatives for Northamptonshire may be needed, including effective policies to drive forward key and wider town centre regeneration proposals in Northampton Central Area and town centres in the County's boroughs and districts.

It is beyond the scope of this report to set out advice on planning for non B-use jobs. Nevertheless, a healthy overall Northamptonshire economy demands a successful Non B-use economy. In this respect it may be appropriate for future policies and site allocations to consider, for example:

- incorporating an appropriate scale and type of non B-use activities in 'traditional' employment (B-use) sites;
- combining in a viable manner, B and non B-uses in town centre master plans and development briefs with a particular focus on how the county's town centre regeneration activities can support jobs growth and
- Complementary initiatives aimed at investing in skills and training in lagging sectors.

To support non B-uses, a county wide working group could be developed to consider the reasons for disparities in performance and propose solutions. It could include planning and economic development officers and private sector representatives tasked with identifying actions to stimulate the demand for employment-generating non B-use sectors.

Supply Response

There is a requirement to provide an immediate employment land supply for different market sectors within each of the County's boroughs and districts. Our analysis of existing allocations indicates there are significant supply problems relating to many market sectors within key towns in the county. It is important these shortages of supply be addressed. The supply offer should be on the basis that sufficient sites are immediately available for development/occupation and there is an appropriate level of choice available to potential occupiers, without flooding the market through an over supply of employment land. Ideally this should relate to sites that provide (1) availability from developers, (on either a speculative or design and build basis), or (2) availability of serviced sites to purchase for potential end-user/occupiers.

In addition to the sites identified in this report, it is recognised that additional sites will come forward through the planning and development processes. Where these are situated in appropriate locations (consistent with relevant policy) and can, through working with statutory bodies demonstrate strong commercial need and viability as well as high sustainability and design standards, such sites should be considered favourably.

Employment Sites of Regional Importance

This study identifies regionally important locations which we consider should be given particular attention when plan making authorities are considering future employment land allocations and it identifies other locations as being worthy of further investigation, albeit these were assessed as not being of strategic or cluster-specific importance. We recommend that policy makers, when deciding on employment land policies for Local Development Documents, give consideration to designating certain locations of regional importance as Strategic Employment Sites and Clusters[1].

Locations with Potential as Strategic Employment Sites and Clusters

- <u>Northampton Town Centre</u> (N5; N17; N18; N20; N21; N23; N34; N35; N36; N38) is a location which should be examined as a regionally important location with good rail connectivity and likely to attract inward investment.
- <u>Land at Northampton South East</u> (N2; N3; N4; N7; N10; N13; N14; N37; S30) is a location which should be examined as a regionally important location with good M1 connectivity and likely to attract inward investment.
- <u>Land at Wellingborough Stanton Cross</u> (W1) is a location which should be examined as a regionally important location with good rail connectivity and likely to attract inward investment.
- <u>Land at Kettering South</u> (K1 / land around Junction 10) should be examined as a regionally important location with good A14 (Trans European Network Route) connectivity and likely to attract inward investment.
- <u>Land at Corby Stanion Plantation</u> (C6) should be examined as a regionally important strategic distribution location with good inter-modal road/rail transfer at the adjacent Eurohub and likely to attract investment.
- <u>Land at DIRFT expansion</u> (D1) should be examined as a regionally important strategic distribution location with good inter-modal road/rail transfer at DIRFT, (with other siding potential), and likely to attract investment.
- <u>High Performance Engineering and Motor Sport Cluster</u>

  <u>Silverstone</u> (S1); <u>Rockingham</u> (C3); <u>Brixworth</u> (D4); should be examined collectively as a sector cluster.

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[1] The origin of the phrase "regionally important locations" derives from paragraph 2.25 of the ELR Guidance Note. It states: "At the regional level, for example, there will be a far greater focus on economic and employment forecasts and <u>aggregate supply</u> and, <u>apart from regionally important locations</u>, less concern about the attributes of individual sites."

Call for Sites and Next Stage Evaluation

A "Call for Sites" from (A) public sector partners (B) private sector developers and landowners produced a long list of some 300 actual and potential sites across Northamptonshire. Close to 2/3rds of these were judged to have insufficient promise of meeting the likely requirements which would warrant allocation as part of Local Development Frameworks. The remaining sites were considered to have sufficient merit to be worthy of taking to the next stage where they could be tested in further detail against policy and deliverability criteria by planning authorities. SELA defines a "*next stage evaluation list*" of some 74 locations totalling over 1,500 ha.

The 6 viewed as regionally important and 3 with cluster potential comprise some 500 ha. The balance (65) potentially total some 1,000 ha more.. In assessing sites and locations SELA has considered a range of key criteria including:

- Planning constraints; compatibility with national, regional and sub-regional plans including the Sustainable Communities strategy and adopted and emerging Local Plans.
- Ownership and site assembly issues, potential land contamination and potential flood risk factors.
- Potential delays whilst waiting delivery of other sites or those dependent on delivery of wider schemes.
- Local and strategic infrastructure issues including but not exclusively "highways" issues.

Flowing from the criteria-based assessment, three key summary 'scores' were produced: sustainability; commercial suitability; and a combined quality score. Sites scoring green and amber are generally put forward for next stage evaluation having regard to key policy and deliverability factors.

Locations for Next Stage Evaluation

- Corby 10 ~ 9 next stage locations in addition to Stanion Plantation (C6; C25) and [*part of Rockingham*] (E25).
- East Northants 9 ~ 8 next stage locations in addition to part of Rockingham (E25).
- Kettering 10 ~ 9 next stage locations in addition to Kettering South (K1).
- Wellingborough 6 ~ 5 next stage locations in addition to Stanton Cross (W1).
- South Northants 11 ~ 9 next stage locations in addition to Silverstone (S1); Preston Grange (S30).
- Northampton 15 ~ 13 next stage locations in addition to Town Centre (N5; N17; N18; N20; N21; N23; N34; N35; N36; N38) and South East District (N2; N3; N4; N7; N10; N13; N14; N37);
- Daventry 13 ~ 11 such sites in addition to DIRFT expansion site (D1) and Brixworth, Ilmor Ave (D5).

Analysis of Employment Sites

There are some large scale sites currently being promoted for employment development, which are linked to the provision of key infrastructure. Provision of new and improved infrastructure will be important to achieving the scale of employment growth required in the county. Regionally important locations are identified and need to be progressed through special intervention measures.. There are also many other sites of local importance which should be considered for allocation where it is feasible and appropriate in planning terms to do so.

Based on comprehensive site assessments, our recommendation is that the sites as set out in Tables 10.4 to 10.10 should be considered and tested through the planning process for primarily employment purposes. The tables provide a summary of the constraints and scheme quality for each site by local authority area. Sites highlighted in green for sustainability and commercial suitability have been assessed as being of the highest quality in terms of suitability for employment. Those highlighted in amber/yellow are considered of fair quality with potential to become high quality employment sites.

Collectively, many of these sites will need to be brought forward in order to achieve a sustainable balance of employment as part of the task of delivering MKSM growth. However, a substantial programme of public sector intervention and enabling activity will be required to bring many of the identified sites forward regardless of their respective formal planning status. The scale, nature and timing of intervention will vary according to the extent of deliverability issues and there will be numerous other barriers to development needing to be resolved for the sites to be brought to market.

Skills and Further & Higher Education Facilities

As already highlighted in SNEAP, there is a need to support creation of a higher level skills base as a key driver in achieving "*high value added*" employment in Northamptonshire, including the need to promote non B-use employment. This will require development of additional Further and Higher Education facilities. These facilities are critical to the promotion of a more knowledge-intensive economy and are often major employers in their own right. Partners in the education sector have a number of existing expansion plans across the county and it will be important to ensure that support is provided to secure the expected increase in student numbers as part of the policy-driven growth agenda.

In doing so, key sites will need to be identified and promoted particularly where educational and research facilities can stimulate the clustering of other business activities in key sectors. Recent examples where clustering effect has taken place include the successful expansion of the Portfolio Innovation Centre located at the University of Northampton which supports, for example, growth of the creative industries sector and the "*iHub*" at Daventry, home to the regionally important university backed "*iCon*", (Innovation in Sustainable Construction), a key sector with clustering opportunities.

Regionally Important Locations/Sites

It is recognised that the preferred employment growth scenario for Northamptonshire represents a significant challenge in terms of delivering the amount of B space employment proposed. Whilst it is important to have a focus on an ability to provide immediate readily available sites to meet the needs of existing companies, a further aim should be to encourage inward investment from regional, national and international sources, requiring a number of strategically sized sites to be offered. In many cases the delivery of relatively large sites will be required in order to support the cost of infrastructure investment and also to provide a critical mass of development appropriate to attracting new large scale investment and occupiers to Northamptonshire. These sites must be of a quality to appeal to the national market and as such need to be specifically targeted to meeting specific market sectors. Such sites will need to be "flagship sites" for the county and beyond with individual site owners being given significant marketing support from the parts of the public sector involved in promotion of Northamptonshire as a whole. In order to deliver these sites in a timely fashion, it will be important for the planning process to operate efficiently and positively in accordance with the emerging PPS4.

In order to ensure that the strategic sites can be made available at the earliest opportunity, significant public sector intervention may be necessary. Amongst others, strategic sites should be prioritised for inevitably limited public sector intervention funds. An initial portfolio of potential strategic sites in the county has been identified in this study. These sites have been proposed on the basis of their: -

- potential to provide a national, regional or sub-regional role in terms of the quantity and/or quality of jobs that can be supported. The sites demonstrate strategic strengths and opportunities in terms of their scope for adding significantly to the growth agenda in Northamptonshire.
- potential to provide a specialist but significant role in terms of sector strengths (as defined by SNEAP or emerging statutory plans).
- potential to delivery high quality development schemes incorporating state-of-the-art technology, physical and electronic connectivity and high environmental standards (e.g. excellent BREEAM status, a low carbon footprint and energy efficiency).

General Strategic Sites

Land at Wellingborough Stanton Cross W1 (46.7ha) forms a smaller part of a SUE to the east of Wellingborough. Concerns exist regarding the deliverability of the full master-plan which may require revision. Similarly, the Section 106 Agreement may also be renegotiated. We consider the office element proposed at Station Island could be a key site for delivery of office accommodation in Northamptonshire. It is strategically located with good rail links to London and potentially good connectivity with Wellingborough town centre. It offers a significant opportunity to attract inward regional and national office occupiers. However, the timeframe for delivering the commercial element may be constrained by the need to fund high up-front infrastructure costs as well as the possibility that competing sites in other locations may be more feasible in the short to medium term.

Land at Kettering South K1 (110 ha) is located on A14 (Trans European Network Route).This site has potential to act as a major site for B2/B8 employment uses that could service national as well as regional and local needs. However, it is recognised that there will be a number of infrastructure constraints, not least in respect of access to the A14. Further work on the deliverability of this site should be undertaken with local partners with a view to its potential importance.

Strategic Distribution Sites

Policy 21 of the RSS establishes the potential for the provision of strategic distribution sites in Northamptonshire during the plan period. It envisages that the preferred locations for these would be located in both North and West Northamptonshire Housing Market Areas. Having evaluated all major existing and potential sites in the county which may potentially serve this function and, given the importance of maximising rail freight opportunities, we consider that the most suitable sites (in terms of both sustainability and viability) to specifically service national B8 requirements would be the planned extensions at Eurohub- Stanion Plantation in Corby and DIRFT in Daventry. In delivering these sites local partners must seek to maximise their economic contribution, through efforts to optimise the provision of ancillary office accommodation and ICT connectivity whilst minimising the environmental impact. For example, limiting damage to adjacent woodlands at Stanion Plantation at Corby and reducing impact on villages and local road systems close to DIRFT in Daventry District.

Land at Corby Stanion Plantation C6 (60 ha) has planning consent for B8 Warehousing and Distribution. Development costs of the scheme are likely to be relatively high which may impact on its deliverability. However as a general location, the site provides an opportunity to provide a large scale, rail-linked warehouse / distribution facility for North Northamptonshire. It may be that viability / deliverability of the scheme could be improved with a larger scale scheme.

Land at DIRFT Expansion Site D1 (54 ha). The site provides an opportunity to extend the substantial existing rail-linked warehouse/distribution facility. Through to 2026 and beyond it may be that there will be additional pressures for development which could extend partially into SELA site D3 and more particularly site D4, which offers the potential for further rail served facilities. Any enlargement of the site should have regard to the potential development of land immediately north of D1 where primarily residential expansion is being promoted adjacent to Rugby and located in Warwickshire (West Midlands Region). Public transport connectivity to the site should be made available , through existing and new transportation infrastructure to maximise the potential jobs growth within the county's labour market.

This study estimates the amount of distribution floor-space needed to meet sustainable growth requirements of the county. With specific regard to DIRFT and Eurohub, these sites are likely to perform an additional and important role contributing to national and international distribution needs. This strategic role should be distinguished from that performed by other B8 sites in the county which are more suited to serving local and sub-regional markets. Indeed, the level of demand likely to be accommodated by DIRFT and Eurohub in serving national markets will be significantly greater than local and sub-regional demand. Consequently, in allocating sites for B8 uses in Northamptonshire, given the national demand potentially to be accommodated at DIRFT and Eurohub, consideration should be given to the level of floorspace required to meet local demand, consistent with planning and wider policy objectives.

Sector Specific Sites

In line with Government Guidance on ELRs, the SELA draws attention to key sectors/clusters in Northamptonshire. In light of the county's internationally recognised strengths in High Performance Engineering and the Motor Sport sector and the emerging Northamptonshire Strategy for the sector, the following sites should be considered as having significant potential in meeting sector/cluster-specific needs:

- Silverstone S1
- Rockingham E25 (part in Corby and part in East Northamptonshire)
- Brixworth; Land at Ilmor Way D5

These sites, in aggregate totalling 84.4 ha, would support a range of B and non B use employment in these locations. The sites are at differing stages of the planning and commercial delivery process. Local partners should continue to work together, as part the Northamptonshire Strategy for High Performance Engineering and Motor sport in bringing forward these sites to specifically support the county's long term growth opportunities. There is considered to be a realistic prospect of suppliers and sub-contractors being attracted to such sector specific locations where some of their major customers already operate. This opens up the opportunity to stimulate the clustering of cutting edge technology supply businesses which can play a major part in generating new, high-value jobs in the County. It is to be noted that site E25 lies across the boundary between Corby and East Northamptonshire. Consequently, in order to maximise the economic potential of the site, it will be necessary for both local authorities to work closely together in planning for its development (e.g. through a joint masterplanning approach).

Northampton Regionally Important Locations

Northampton Central Area

The redevelopment and revitalisation of Northampton town centre is a strategic priority. It is desirable that it includes commercial B-use employment sites as well as non B-use. Potential B-use employment sites, aggregating to some 30 ha, if delivered to maximum effect could support a significant amount of B1 accommodation. In particular, we note sites N5 Waterside Avon; N17 Castle Station; N18 Waterside West; and smaller sites such as N20 St Johns, N21 Angel Street, N23 Bridge Street; N34 Lady's Lane; N35 Newland; N36 Victoria Street and N38 Edgar Mobbs Way. The phasing of these sites will need to be carefully planned to ensure a balance of supply and demand in the town centre, but collectively they have the potential to contribute significantly to the revitalisation of Northampton Central Area.

Northampton South East District

The South East District of Northampton centred on Bedford Road is generally considered as having potential to accommodate some part of the planned growth of Northampton. The extent of growth to be allocated is currently unknown and different views have yet to be reconciled. However, under most scenarios, there is potential for a significant employment land allocation, building on the existing successful Brackmills and Lakes developments. Sites N2; N3; N4; N7 and N10 Brackmills; N13 The Lakes; N14 Land at Martin's Farm; N37 Land at Houghton Gate/Bedford Road; S30 Land around Preston Grange and probably others yet to be identified could be brought forward so as to maximise linkages between them and provide a development zone of over 120ha. This could be designated as a strategic site for the county if policy-makers decide on that course of action. Significant land assembly and infrastructure constraints would need to be addressed. It potentially may provide a satisfactory option for a Technology Realm hub.. Support of the HCA would be of particular importance in delivering this as a strategic location. We consider that site N14, in particular, provides the opportunity for early delivery of some prime employment land within this wider area.

District Overviews

Many urban area extensions, known as Sustainable Urban Extensions (SUEs) are proposed throughout Northamptonshire, some being a long way off implementation. These mixed used schemes incorporate significant levels of residential development alongside economic, social and community facilities. These major schemes will inevitably require significant infrastructure investment for their delivery. It is important these sites are brought forward to achieve a reasonable balance between jobs and housing growth. However, in some cases a lack of commercial attractiveness of such sites may increase the need to consider employment development at other locations. Our recommended list of sites for further investigation (set out in schedules at the end of this Executive Summary and in Tables 10.4 to 10.10), have emerged from an independent site assessment process. We consider that these sites should all be further tested through the planning process for primarily employment purposes.

Wellingborough

In addition to the potential strategic site at Stanton Cross, it is considered that Appleby Lodge: W14 (65.3ha) provides a deliverable opportunity for high quality mixed employment development. This site would be an extension to Park Farm Industrial Estate. A major step change is required to deliver significant growth in the office sector. High quality sites in the best locations will need to be provided in order to attract regional and national demand.

Wilby Grange, W13 (16.2 ha of commercial floor-space as part of a larger mixed use scheme) has the potential to attract regional demand. Existing highways problems to the A45 at the Wilby roundabout are a major constraint to development in Wellingborough generally. To support the delivery of significant employment growth in the area, it may be necessary to consider collectively a range of sites in order that a sufficient critical mass can be achieved to address the cost of overcoming highways constraints. The problems at the Wilby roundabout on the A45 are widely recognised and a solution to this highways constraint may be of considerable benefit to Wellingborough and North Northamptonshire as a whole.

Kettering

Given its location on the A14, Kettering has the potential to attract significant 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 available to the south of the A14 at Junctions 8, 9 or 10, typically K1; K6, K7. Alternatively there is the potential for a major site to be delivered at Junction 7 at the connection with the A14 and A43. Each of these locations has the potential to provide an important “gateway site” into Kettering. This general location is considered to provide the most significant area for employment growth in Kettering, for example through the provision of a new high quality business park within the next five years. Potential also exists for further development to the north of Kettering at K8, although this may be for general B-use as well as non B-use development. It should be highlighted that a major constraint to development in this and the wider area is area between junctions 7 and 10 of the A14. Overcoming capacity constraints in this location will be central to realising the employment potential of Kettering.

Corby

Corby has a good range of employment sites currently available for delivery in the marketplace or well advanced through the planning process. The successful delivery of the remaining part of the Parklands Gateway Scheme: C26 (2.8 ha) is important. However the area linking central Corby with the new railway station is of equal priority. As such there should be a focus on the delivery of the Corby Community College: C10 (4.0 ha).

Stanion Plantation is the strategic B8 site for North Northamptonshire. There are concerns regarding its viability. There is potential for the site to be developed in tandem with Brownfield sites C30, C31 and C32, which should be explored further although they individually were not assessed as being sites for further evaluation Aggregating a number of sites may improve commercial deliverability of Stanion Plantation, whilst stimulating regeneration in the southeast/east sector of the town.

East Northamptonshire

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. Site E7 at Northampton Road, Rushden (6.1ha), provides an immediately deliverable opportunity to extend existing high quality industrial/office development undertaken in Rushden over recent years.

As part of a mixed commercial / residential development to the northeast of Raunds, employment delivery should be regarded as appropriate at Raunds north/north east sector E3. As currently proposed, the employment area will amount to some 26.0 ha. The site provides an opportunity for mixed-use commercial development on a phased basis.

Potential extension to Warth Park E2 (33.5 ha) provides a potential opportunity for larger scale warehouse delivery by adding to the original development. It is important to place this within the context of providing only the most suitable sites for B8 development. It is apparent Warth Park has been able to attract demand from outside Northamptonshire, particularly from the east, (from centres such as Huntingdon, Peterborough and Cambridge). This is often not just restricted to high bay large scale warehouse development but a wider range of flexible distribution and industrial enquiries which is encouraged by the developers. The strength of the location is further evidenced by recent and proposed future extensions on-site by existing tenants.

Daventry

There is potential to increase the area available for employment land in the south east area of Daventry - Marches/ Burnt Walls; D6; D28 (14 ha). Re-evaluation is subject to the outcome of recent inquiries and further masterplanning work. This area provides an opportunity to deliver high quality employment development and we consider that such potential on land near Burnt Walls could be re-examined. There is further potential on land at Apex Park - D2 (35 ha).

A number of potential high quality employment sites are identified at and adjacent to Crick, serviced by Junction 18 of the M1 motorway. This is a high quality location and continued pressure for occupier-led development in this area is anticipated. Considerable care will be needed to optimise the economic benefits without causing excess damage to the rural character of surrounding villages which is a significant threat in this part of the county.

South Northamptonshire

In Towcester, S12 Land South and West of Towcester (20.6ha) is part of a proposed major SUE which includes employment proposals south of Towcester on the A5 and to the west serviced by the proposed new bypass link. Whilst significant infrastructure is required for delivery, S12 has the opportunity to provide a range of good quality employment. Land at Burcote Wood Farm S17 (24.5ha) is being promoted and has potential for B-uses. More immediately available are sites near the A43/A5 junction to the north of Towcester. Land South of Jacks Hill Cafe S42 (8.5 ha) may be more deliverable in the short term than sites S12; S17 to the south and west of Towcester. In addition, Burcote Road S3 to the southern end of the central area of Towcester close to the A5 provides an opportunity for further good quality employment delivery.

At Brackley, sites S9, S13, S18 and S22 (totalling 28.2 ha) have been identified, all of which would provide high quality employment locations. Brackley has additional potential from the High Performance Engineering and the Motor sport Sector, which is expected to continue to draw sub-contractors and suppliers into Northamptonshire.

Land near Junction 16 (site S16 – 150ha) lies in South Northamptonshire but, if developed, would significantly influence the Daventry and Northampton labour markets. The location has been identified in the emergent West Northamptonshire Joint Core Strategy as a potential strategic employment site. This includes around 60% for B8 purposes leaving a significant residue of land for offices, light industrial, general industrial, special industrial and non B space uses. Similar to other large potential sites in the SELA, the promotion of the site is at an early stage and concerns expressed by some public sector partners largely relating to sustainability issues will need to be fully addressed during the next-stage evaluation process recommended in this report.

Northampton (and wider Northampton Implementation Area)

We have conducted the study on the premise that the town centre sites be considered together to form a single strategic 'site' in view of the importance of upgrading the overall offer of the County town as a major business location.

It is equally important that a number of out of town employment sites are brought forward for development. Continued pressure for development which has the potential for being mainly occupier-led is anticipated around Grange Park (in South Northamptonshire) which has excellent accessibility southbound on the M1 (sites S36 and S37 totalling 18.1ha).

Other sites which will complete the South West District include Swan Valley (sites N8; N25; N26 and N28 (19.1ha), Pineham East (site N24 totalling 14.0ha) and Upton/Upton Lodge/Upton Park (sites N6; N15 and N16 totalling 10.8ha).These will complete the south west district 170ha strategic employment site.

There is the potential for a significant employment land allocation to the east of Northampton, building on the existing successful Brackmills and Lakes developments. Sites N10, N13, N14, N16, N37, S30 and potentially others yet to be identified could be brought forward in such a way to maximise the linkages between them and provide a development zone of over 100ha. This seems to have significant merit to be considered as an additional strategic site for the county, although significant land assembly and infrastructure constraints would need to be addressed. It might also provide a potential option for a Technology Realm hub site. Furthermore, the support of the HCA would be of particular importance in delivering this option as a strategic location. We consider that site N14 provides the opportunity for early delivery of prime employment within this wider area.

Concerns expressed by Public Sector Partners

During the consultation period, a number of concerns have been raised by public sector partners regarding the deliverability and suitability of some sites in terms of potential planning policy conflicts and significant infrastructure constraints. Given the strategic nature of the study and a lack of sufficiently detailed information, these issues have not been addressed in detail by the SELA. As previously highlighted, the SELA has set out a range of sites with potential for allocation although the need remains that local planning authorities should fully assess the sites as part of the formal planning process. Given the ambitious employment growth objectives established for Northamptonshire, the SELA has taken particular care not to exclude sites which merit further assessment when the commercial viability attributes of sites are strong. Clearly, should many of these sites be considered for allocation, significant sustainability constraints will need to be addressed in accordance with national, regional and local policy requirements. These concerns should be fully examined by local planning authorities, through the full planning system.. As part of this process, promoters of the sites will need to provide local planning authorities with sufficient evidence and robust supporting information to enable a properly informed planning decision to be made.

It is not appropriate for all site-specific concerns raised during the consultation period to be set out as part of this report. However, if requested, responses made as part of the "Call for Sites" process can be made available by NEL.

Public Sector Intervention and Enabling Activity

Targeted but significant public sector interventions and enabling measures will be required to support the delivery of sustainable economic growth in Northamptonshire. These should aim to:

- facilitate the provision of the right sites in the right places where and when the market is likely to fail without public sector intervention;
- accelerate the timescale of bringing forward key sites and premises to market in order to contribute significantly to meeting the county's preferred economic scenario;
- ensure the delivery of high quality jobs that will add significant value to and assist in diversifying the Northamptonshire economy;
- bring forward key sites in town centres or close to major public transport hubs with significant employment generating component;
- enable sustainable economic growth and diversification in market towns and rural villages where market failure is evident: and
- seek innovative solutions to bring forward development, potentially including Accelerated Development Zones.

Intervention and enabling measures

Subject to State Aid rules, local authorities, delivery vehicles and other public sector partners should seek to devise innovative solutions to bring forward high quality developments. Where there is clear economic requirement and impact from developments the public sector should work with private partners to ensure the county has a sufficient level of commercial sites and premises to meet the needs of businesses and achieve sustainable economic growth. Such as: -

- land acquisition by public sector bodies and/or direct development;
- gap funding; up-front / early infrastructure provision;
- redistribution of Section 106 funds and innovative use of the Community Infrastructure Levy (CIL);
- grant support for upgrading and refurbishment and/or for land remediation and site preparation;
- special Joint Venture initiatives, such as the successful Fit For Market scheme, JESSICA initiative and further consideration of the Asset Backed Vehicle model;
- Business Improvement Districts (BIDS) and Tax Increment Financing (TIF);
- Targeted and responsive business support and inward investment services aimed at efficiently meeting investor and occupier needs with the right sites in the right location at the right time;
- facilitating and encouraging greater choice of freehold sites; and
- provision of enterprise units in rural towns and villages.

SELA portfolio of locations/sites with potential for "next stage" evaluation

This portfolio of locations/sites reduces the long list of sites obtained from a "*call for sites*" to a manageable number of some 74 locations which are suggested to be tested through the planning process against policy, sustainability, deliverability criteria. The portfolio draws from tables 10.4 to 10.10, offering a potential land supply of circa 1500 ha.

<u>Corby</u> – Table 10.4 shows 10 locations suggested to be put to the next stage of evaluation.

<u>Corby</u>

Land at Priors Hall	5.8 ha	C1	
Land at North Birchington Rd	36.3 ha	C2	
Land at Cockerell Road	9.3 ha	C4	
Land at Willowbrook North	25.9 ha	C5	
Land at Stanion Plantation	60.4 ha	C6; C25	*has potential as a Strategic Distribution Site*
Land at Community College	4.0 ha	C10	
Land at Centrix Park	11.3 ha	C11	
Land at Scot Hill	9.6 ha	C23	
Land at Parkland Gateway	2.8 ha	C26	
Land in built-up area	8.1 ha	C9; C12; C14; C27	*aggregation of smaller sites*
Land at Rockingham	inc	E25	*part of 40.5ha which lies in Corby*

<u>Subtotal 173.5 ha</u>

<u>East Northamptonshire</u> – Table 10.5 shows 9 locations suggested to be put to the next stage of evaluation.

<u>Rushden</u>

Land at Northampton Road	6.1 ha	E7	
Land in town centre	5.3 ha	E9; E10; E14; E18; E19	*aggregation of smaller sites*

<u>Raunds</u>

Land at Warth Park	33.5 ha	E2	
Land at North/North East site	26.0 ha	E3	

<u>Oundle</u>

Land at East Rd	1.0 ha	E8	

<u>Thrapston</u>

Land generally in built-up area	5.7 ha	E11; E12; E13; E15; E23	*aggregation of smaller sites*
Land at A1/M1 Link Plot 2	2.0 ha	E24	

"<u>Stand-alone" Locations</u>

Land at Nene Park	20.3 ha	E17	
Land at Rockingham	40.5 ha	E25	*potentially part of a Motor Sport Cluster*

<u>Subtotal 140.4 ha</u>

<u>Kettering</u> – Table 10.6 shows 10 locations suggested to be put to the next stage of evaluation.

<u>Kettering</u>
- Land at Kettering South 110.0 ha K1 *has potential as a Strategic Employment site*
- Land at Cransley Park 13.0 ha K6
- Land at Kettering Hub 15.0 ha K7
- Land at Kettering Business Pk 15.0 ha K8
- Land at Kettering East 20.2 ha K10
- Land at Station Quarter 5.0 ha K34
- Land at Stanier Close 2.5 ha K36

<u>Burton Latimer</u>
- Land adjoining A6 32.6 ha K14

<u>Desborough</u>
- Land at Magnetic Park 6.0 ha K31
- Land at Gladstone St/Old Depot 1.2 ha K35;K37

<u>Subtotal 220.5 ha</u>

<u>Wellingborough</u> – Table 10.7 shows 6 locations suggested to be put to the next stage of evaluation.

<u>Wellingborough</u>
- Land at Stanton Cross 46.7 ha W1
- Land in built-up area 5.8 ha W3; W4; W5 aggregation of smaller sites
- Land at Upper Redhill 10.5 ha W6
- Land at Wilby Grange 16.2 ha W13
- Land at Appleby Lodge 65.3 ha W14
- Land at Ogee Business Park 9.7 ha W 15

<u>Subtotal 154.3 ha</u>

<u>South Northamptonshire</u> – Table 10.8 shows 11 locations suggested to be put to the next stage of evaluation.

<u>South East District Northampton</u>
- Land at Preston Grange 50.0 ha S30 *proposed to be in a "Strategic Site*

<u>South West District Northampton</u>
- Land at Pineham West 16.0 ha S34 *part of an existing "Strategic Site"*
- Land at Grange Park 18.1 ha S14; S36; S37 *part of an existing "Strategic Site"*

<u>Towcester</u>
- Land generally in built-up area 4.9 ha S3; S4; S15; S31; S32 *aggregation of smaller sites*
- Land South of Jacks Hill Café 8.5 ha S42
- Land at Turweston Road 24.2 ha S9; S13
- Land at Radstone Field/Sawmill 4.0 ha S18: S22

<u>"Stand-alone" Locations</u>
- Land at Siverstone Circuit 37.7 ha S1 *potentially part of a Motor Sport Cluster*
- Land South/West of Towcester 20.6 ha S12
- Land at Junction 16 of M1 150.0 ha S16 *originally submitted as 40.5 ha*
- Land at Burcote Wood Farm 24.5 ha S17

<u>Subtotal 358.5 ha</u>

<u>Northampton</u> – Table 10.9 shows 16 locations suggest to be put to the next stage of evaluation.

<u>Northampton Town Centre</u>			*proposed to be a "Strategic Site"*
• Waterside West & East (Avon)	14.0 ha	N5; N18	
• Land at Castle Station	5.3 ha	N17	
• Land generally in built-up area	10.0 ha	N20; N21; N23; N34; N35; N36; N38.	*aggregated small sites*
<u>South East District</u>			*proposed as part of a "Strategic Site"*
• Land at The Lakes	3.1 ha	N13	(*existing allocation*)
• Land at Brackmills	19.1 ha	N2, N3, N4, N7, N10	(*existing allocation*)
• Land at Houghton Gate	19.5 ha	N37	
• Land at Martin's Farm	32.4 ha	N14	
<u>South West District</u>			*part of an existing 170 ha "Strategic Site"*
• Land at Pineham West	14.0 ha	N24	*(existing allocation)*
• Land at Swan Valley	19.1 ha	N8; N25; N26; N28	*(existing allocation)*
• Land at Upton/Upton Lodge	10.8 ha	N6; N15: N16	
<u>Northampton Built-up Area</u>			
• Land generally in built-up area	8.4 ha	N4; N9; N19; N30; N33	*aggregation of smaller sites*
• Land at Aspect Business Pk	5.4 ha	N22	
• Land at Kings Heath; Dallington	14.0 ha	N31	
• Land at St James	0.9 ha	N32	
<u>"Stand-alone" Locations</u>			
• Land at Collingtree	2.0 ha	N12	
• Land at Milton Ham	10.0 ha	N29	
	<u>Subtotal 168.5 ha</u>		

<u>Daventry</u> – Table 10.10 shows 13 locations suggested to be taken forward to the next stage of evaluation.

<u>DIRFT and related areas</u>			*<u>DIRFT</u> is an existing "Strategic Site"*
• Land at DIRFT expansion site	54.0 ha	D1	*has potential as a Strategic Distribution Site*
• Land at Rugby Radio Station	210.0 ha	D4	
• Land at Midland Meat Packers	38.7 ha	D21	
<u>Daventry</u>			
• Land at Heartlands	1.6 ha	D22	
• Town Centre sites	3.8 ha	D26; D27; D32; D33	
• Land at Marches/Burnt Walls*	10.0 ha	D6	*NB. Danetre application is subject to appeal*
• Land at Lower Marches*	4.0 ha	D28	**Marches/Burnt Walls could be increased post appeal*
• Land at Browns Road	3.2 ha	D10	
• Land at Apex Point	35.0 ha	D2	
• Land at Church Fields	2.0 ha	D12	*NB. Croudace application is subject to appeal*
<u>Northampton Implementation Area</u>			
• Land at Holly Lodge Drive	5.2 ha	D23	
<u>"Stand-alone" Locations</u>			
• Land at Brixworth Ilmor Way	6.2 ha	D5	*potentially part of a Motor Sport Cluster*
• Land at Overston Leys/Rnd Hill	55.0 ha	D19; D30	
	<u>Subtotal 397.2 ha</u>		

1. Introduction

Background

1.1 Atkins Ltd in association with Lambert Smith Hampton and Nortoft ltd were commissioned in November 2008 to prepare the Strategic Employment Land Assessment (SELA) for Northamptonshire on behalf of Northamptonshire Enterprise Ltd (NEL).

1.2 Northamptonshire is part of one of only four designated growth areas under the government's Sustainable Communities Plan. NEL was formed in September 2006 and provides a unique partnership between different economic development agencies such as the Economic Development Unit of the Northamptonshire County Council, the Northamptonshire Partnership (emda's Sub Regional Strategic Partnership, Invest Northamptonshire (a dedicated investment promotion agency) and Explore Northamptonshire (the destination marketing and management company). NEL are working with the North Northamptonshire Joint Planning Unit and West Northamptonshire Joint Planning Unit in delivering the SELA.

1.3 The brief for this study highlights that Northamptonshire forms a significant part of the Milton Keynes South Midlands (MKSM) growth area as defined by the Government's Sustainable Communities Plan. In 2005, the MKSM sub-regional strategy established key growth priorities for Northamptonshire which included the need to provide for a rapidly growing population which has been translated into targets being established for the development of over 100,000 new homes and 81,000 new jobs by 2021.

1.4 Responding to the aims and objectives of the MKSM strategy and the East Midlands Regional Plan, local authorities in North (Corby, Kettering, Wellingborough and East Northamptonshire) and West (Northampton, Daventry and South Northamptonshire) Northamptonshire are preparing Core Spatial Strategies (CSS) and borough/district level Local Development Documents in order to plan for the future development and spatial needs of the county. In North Northamptonshire, the CSS was adopted in 2008 although an early review of this is already underway. In West Northamptonshire, the constituent local authorities are progressing the emergent Joint Core Strategy in line with the adopted Local Development Scheme. This technical report will provide an important input to the development of strategic policies in the forthcoming CSS for West Northamptonshire, and the review of the North Northamptonshire CSS as well as the emerging plans being prepared by districts and boroughs in the County.

1.5 The MKSM strategy is reflected within the recently adopted East Midlands Regional Plan (March 2009). This reflects the longer term aspirations of the Sustainable Communities Plan which identifies growth of 167,000 new homes and 141,000 new jobs in the county for the period 2001 to 2031.

1.6 The SELA will complement work underway at WNDC and NNDC, working with the local authorities and other partners to implement the growth agenda in Northamptonshire, including through the Programme of Developments (PoDs) for North and West Northamptonshire. The PoD is an infrastructure investment programme which sets out the ambitions for growth (as established by the statutory planning process), including a trajectory for housing delivery. It also identifies the infrastructure needed to achieve it, the timescales for delivery and importantly, the resources available for implementation and an assessment of the extra funding needed to it. The PoDs cover a range of infrastructure needs including schools, green infrastructure, economic development, roads and town centre development.

1.7 Similarly, within the framework of the Local Area Agreement, the County Council and its partners are preparing an Infrastructure Delivery Plan covering the whole County. However, this is initially focused on transport and transport-substitution projects.

Purpose of the Study

1.8 This study builds on a substantial body of work which has already been undertaken to inform future strategic economic and employment land policies and priorities in the county. This includes the CoPELA studies (2003 and 2006) which set out future employment floorspace demand and supply requirements for the county based on core MKSM aims and objectives. In addition, the Draft Strategic Northamptonshire Economic Action Plan (SNEAP, February 2008) established an a preferred economic vision for the county which set out a preferred economic scenario and subsequent employment targets for North and West Northamptonshire for the period up to 2026. For the period 2001-2021, these included the aim to provide an additional 47,400 jobs in North Northamptonshire (as adopted in the CSS) and 53,000 additional jobs in West Northamptonshire.

1.9 In accordance with the Government's Employment Land Review Guidance note, a number of distinct areas of activity have been undertaken as part of the process of producing a Strategic Employment Land Assessment for Northamptonshire. These core outputs include

- Identifying a preferred econometric model for future job growth in Northamptonshire and the county's Housing Market Areas.
- Examining and recommending the quantum of future development required to facilitate Northamptonshire's growth requirements.
- Providing a detailed overview of the current commercial market conditions affecting Northamptonshire.
- Supporting the regional and county evidence base for economic and planning policy.
- Identifying key strategic sites and policies for growth in line with adopted and emerging planning guidance.
- Providing guidance on monitoring and review, and how jobs growth can be achieved through employment land delivery.

1.10 In delivering these outputs, the brief highlighted the following key requirements of the SELA:

- Assess the Northamptonshire commercial property market.
- Evaluate the range of employment forecasts for the area and the underlying assumptions, in line with planning policy.
- Evaluate current employment land allocations in relation to commercial market demands and strategic priorities.
- Identify measures required to ensure that an appropriate range of employment sites are made available to meet employment forecast requirements.
- Identify key strategic site policies and potential sites for growth in line with adopted and emerging CSS's with a particular focus on the differing requirements from the various planning bodies (e.g. Strategic Distribution Sites).
- Provide a single employment land assessment framework for use by local, county and regional partners.
- Provide guidance on monitoring and review, and how outcomes can be rolled forward to 2031

1.11 Adding to the above key requirements, the brief highlighted the need for SELA to address a range of key issues and questions:

- Do existing employment land sites adequately address both the overall supply and importantly the quality of land needed to achieve the step change in jobs growth?
- Do we need to re-phase or re-allocate sites to meet jobs forecasts and/or commercial demand? Consider how/when existing employment sites should be promoted, and new sites brought forward in a phased approach, to ensure sustainable development with respect to available workforce, transport infrastructure, proximity to residential sites).
- Highlight locations of/ criteria for any new strategic sites, in line with Regional Policy, including the need and potential for rail served Strategic Distribution sites that maybe required in the county to achieve the step change in employment growth in the county.
- Are there brownfield land opportunities that could be developed to provide for any required development sites, in line with adopted policy?
- Advise on how to improve policy making and site allocation process to take more account of the quality of employment land and commercial property market issues identified.
- Advise on nature and location of new employment land allocations required to achieve forecast jobs growth.

Structure of Report

1.12 Section 2 provides a review of key strategic policy issues and highlights the implications of these for SELA.

1.13 Section 3 sets out baseline socio-economic conditions and examines the economic geography of Northamptonshire with a view to establishing the most appropriate spatial units when planning for economic development in the county.

1.14 Sections 4-7 comprise an evaluation of the demand / need component of planning for employment development in Northamptonshire:

- Section 4 provides a review of the existing employment forecasts and projections for Northamptonshire which includes an analysis of the key assumptions underlying these forecasts.
- Section 5 takes a step back from established employment growth forecasts for the county and assesses progress made to date (since 2001) in meeting MKSM job reference values.
- Section 6 tests a range of future employment growth scenarios by employing a range of techniques and policy-based assumptions.
- Section 7 summaries the property market context in North and West Northamptonshire.

1.15 Section 8 provides a summary of the existing and potential future supply of employment land resources in Northamptonshire. Particular consideration is given to the quality of existing allocations and proposed (unallocated) sites and their potential to make a genuine and effective contribution to meeting the established employment growth targets in Northamptonshire.

1.16 Section 9 summarises the demand/need – supply balance and highlights key priorities for the county in terms of ensuring the provision of suitable employment sites realistically can meet the needs of businesses in the future in order to deliver the amount and type of employment growth envisaged for the county. This includes recommendations for identifying a new portfolio of sites as well as recommendations for targeting public sector interventions which may be required to accelerate or facilitate the supply and take-up of good quality sites.

1.17 Section 10 sets outs our conclusions and policy recommendations. This includes recommendations relating to:

- The amount, type and timing of employment land provision that needs to be made in order to meet MKSM and other policy aspirations for the county;
- The role of employment land policy as a contributor to the facilitation of economic growth in Northamptonshire.
- Preferred strategic locations for growth having regard to property market, sustainability and land supply considerations.
- The identification of key strategic / priority sites including strategic distribution sites.
- The intervention and policy strategy required to ensure that employment land supply in Northamptonshire in planned for in a manner which maximises the county's ability and capacity to facilitate the required level and amount of economic growth.

2. Policy Context

Introduction

2.1 This section provides a review of the planning and economic development policy context of particular relevance to the study. Its purpose is to highlight and identify the key established strategic policy drivers that need to be taken into consideration in the development of employment land policies in Northamptonshire. The key implications of these policies for SELA are highlighted at the end of the Section.

National Policy Guidance

Planning Policy Statement 1: Delivering Sustainable Development

2.2 PPS1 sets out overarching strategic planning policies aimed at the delivery of sustainable development through the planning system.

2.3 The document states that '**Sustainable development is the core principle underpinning planning**'.

2.4 Planning should facilitate and promote sustainable and inclusive patterns of urban and rural development by, amongst other objectives:

- **making suitable land available for development in line with economic, social and environmental objectives to improve people's quality of life**;
- contributing to sustainable economic development;
- ensuring that development supports existing communities and **contributes to the creation of safe, sustainable, liveable and mixed communities with good access to jobs** and key services for all members of the community.

2.5 Under the heading 'Sustainable Economic Development' PPS1 states that 'The Government is committed to promoting a strong, stable, and productive economy that aims to bring jobs and prosperity for all'. In order to achieve this objective, planning authorities should:

- Recognise that economic development can deliver environmental and social benefits.
- Recognise the wider sub-regional, regional or national benefits of economic development and consider these alongside any adverse local impacts.
- Ensure that suitable locations are available for industrial, commercial, retail, public sector (e.g. health and education) tourism and leisure developments, so that the economy can prosper.
- Recognise that all local economies are subject to change; planning authorities should be sensitive to these changes and the implications for development and growth;
- Actively promote and facilitate good quality development, which is sustainable and consistent with their plans.
- Ensure that infrastructure and services are provided to support new and existing economic development and housing.
- Ensure that development plans take account of the regional economic strategies of Regional Development Agencies, regional housing strategies, local authority community strategies and local economic strategies.

Consultation Paper on Planning Policy Statement 4 – Planning for Prosperous Economies (2009)

2.6 The Consultation paper PPS4, published in May 2009, when adopted will replace the existing PPG4 (Industrial, Commercial Development and Small Firms); Draft PPS4 (Planning for Sustainable Economic Development); PPG5 (Simplified Planning Zones); PPS6 (Planning for Town Centres); and the economic development elements of PPS7 (Sustainable Development in Rural Areas). The proposed PPS4 seeks to put in place a national planning policy framework for economic development at regional, sub-regional and local levels for both urban and rural areas.

2.7 The objectives underlying PPS4 include:

- Raising the productivity of the UK economy;
- Deliver more sustainable patterns of development, and respond to climate change;
- Promote the vitality and viability of town and other centres – new economic growth and development should be focused in existing centres; and
- Build prosperous communities by improving the economic performance of cities, sub-regions and local areas, promoting regeneration and tackling deprivation.

2.8 The consultation paper on PPS4 places substantial emphasis on the need to provide a robust evidence base when planning for economic development. Policy EC1 (Using evidence to plan positively) highlights that local planning authorities should work together to prepare, and maintain, a robust evidence base to understand both existing business need and likely changes in the market. It is highlighted that many **economic markets operate at the sub-regional level, are not consistent with administrative boundaries, and in some areas cross regional boundaries**. Consequently, when planning for economic development, this implies the need to take into account the functional geography of business markets.

2.9 The evidence base should underpin development plan policies which support sustainable economic development. However, it states that there is a limit to the extent local planning authorities can predict the future of their local economies and so **a flexible approach to the supply and use of land will be important**. Annex B sets out a range of data that may be useful in establishing a robust evidence base. This includes the use of demographic and economic forecasts and projections at the regional and sub-regional level.

2.10 Policy EC4 identifies the approach local planning authorities should take when planning for economic development. Through local development frameworks, local authorities should:

- Positively and proactively encourage sustainable economic growth based on a clear and proactive locally specific economic vision and strategy.
- Prioritise previously developed land. Where necessary to safeguard land from other uses, local authorities should **identify a range of sites** to facilitate a broad range of economic development **including mixed-use**.
- Support existing business sectors.
- Ensure that site allocations for economic development, particularly if they are for single or restricted uses, are not carried forward from one version of the development plan to the next without evidence of the need and reasonable prospect of their take-up during the plan period. **If there is no reasonable prospect of a site being used for the allocated economic use during the plan period, the allocation should not be retained**.

2.11 Local Development Frameworks should contain policies which:

- Plan for new or emerging sectors likely to locate in the local area but maintain flexibility in policies on the supply and use of land to accommodate sectors not anticipated in the plan and **allow a quick response to changes in economic circumstances**.
- Make provision for a **broad range of business types**. The authority should consider how its portfolio of sites can be delivered, including whether land assembly needs to occur and what other mechanisms can be used.
- **Identify, protect and promote key distribution networks**, and locate or co-locate developments which generate substantial freight movements in such a way as to minimise carbon emissions. Such networks and development should be in sustainably sited locations, so as to avoid congestion and to preserve local amenity interests whilst ensuring accessibility.

2.12 Policy EC5 emphasises the need to plan for economic development in town centres. This includes the need to adopt flexible town centre policies which are able to respond to changing economic circumstances. Policy EC6 encourages local planning authorities to plan for consumer choice and promote competition. This should include policies which support the diversification of uses in town centres. Policy EC7 applies the sequential approach to site selection in town centres.

2.13 Policy EC9 highlights that economic development in open countryside away from existing settlements should be strictly controlled. Most new development should continue to be located in or on the edge of existing settlements. In **rural areas**, planning authorities should:

- **identify local service centres as the preferred location for new economic development**;
- away from larger urban areas, focus most new development in or on the edge of local service centres where employment, housing, services and other facilities can be provided close together; and
- set out the criteria to be applied to planning applications for farm diversification, and **support diversification** for business purposes that are consistent in their scale and environmental impact with their rural location.

Planning Policy Statement: Sustainable Development in Rural Areas (2004)

2.14 The objectives of PPS7 are:

- To raise the quality of life and the environment in rural areas;
- To promote more sustainable patterns of development;
- To promote the development of the English regions by improving their economic performance so that all are able to reach their full potential (by developing competitive, diverse and thriving rural enterprise); and
- To promote sustainable, diverse and adaptable agricultural sectors.

2.15 PPS7 states that in rural areas, planning authorities should focus new development in or near to local service centres where employment, housing, services and other facilities can be provided close together. However, it goes on to highlight that:

'Planning authorities should set out in LDDs their policies for allowing some limited development in, or next to, rural settlements that are not designated as local service centres, in order to meet local business and community needs and to maintain the vitality of these communities. In particular, authorities should be supportive of small-scale development of this nature where it provides the most sustainable option in villages that are remote from, and have poor public transport links with service centres'.

2.16 In meeting the economic needs of rural areas, PPS7 states that local planning authorities should:

- Identify in LDDs suitable sites for future economic development, particularly in those rural areas where there is a need for employment creation and economic regeneration;
- Set out in LDDs their criteria for permitting economic development in different locations, including the future expansion of business premises, to facilitate healthy and diverse economic activity in rural areas.

Planning Policy Statement 3 – Housing (2006)

2.17 In developing their previously-developed land strategies, paragraph 44 of PPS3 states that Local Planning Authorities should consider:

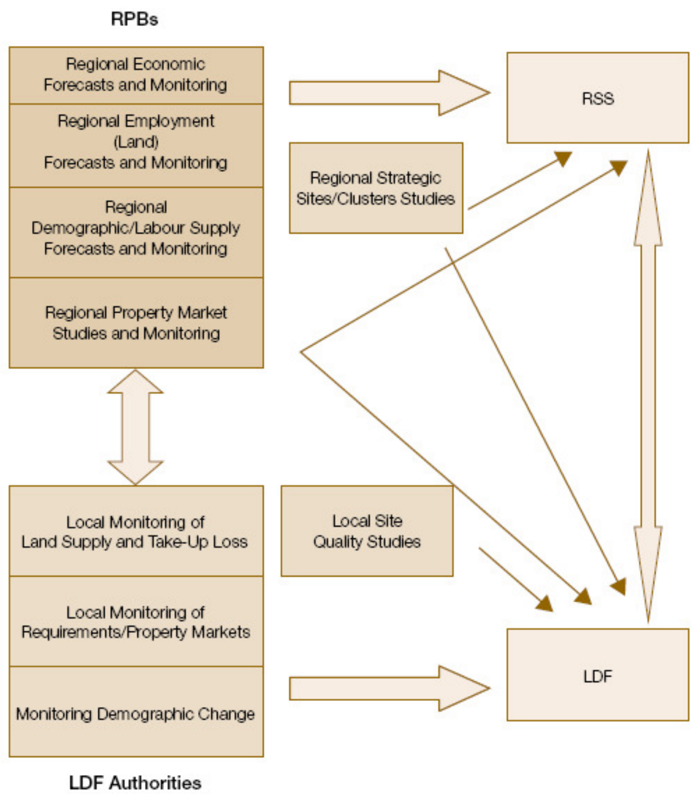
'…whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development.'

2.18 In assessing such sites, the Policy Statement points to the Government's guidance produced in relation to Employment Land Reviews.

Employment Land Reviews: Guidance Notes (ODPM, 2004)

2.19 In December 2004, the ODPM issued a guide for planning authorities with respect to assessing the demand for and supply of land for employment. The guide recognises that employment land is reviewed at various geographical levels of analysis ranging from region at the top of the hierarchy down to districts and sub-districts below. Differing geographies will have differing considerations, with regional and sub-regional reviews paying greater attention to signficant "strategic" locations, and smaller geographies where more comprehensive reviews are likely to be needed. Figure 2.1 depicts the hierarchy to inform the focus of analysis to be undertaken for employment land reviews at various levels of geography.

Figure 2.1 - Economic and Employment Land Review Hierarchy



Note: The regional level forecasting should be disaggregated to sub-regional levels, where appropriate.

Source: Employment Land Reviews: Guidance Notes (ODPM, 2004)

2.20 For Northamptonshire, it is necessary to provide sub-regional forecasts and support the work of local/ site quality studies where appropriate.

2.21 In addition to setting out regional strategic and cluster site requirements, the ELR guidance note helps authorities assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher value uses and help identify those which are no longer suitable for employment development which should be made available for other uses. NEL has worked with the department for Communities and Local Government (CLG) to ensure that is adopting emerging best practice in employment land review and in line with Consultation Paper on PPS4.

2.22 The guide identifies a three step process in undertaking employment land reviews:

- Stage 1 – Taking stock of the existing situation, including an initial assessment of 'fitness for purpose' of existing allocated employment sites;
- Stage 2 – Creating a picture of future requirements by using a variety of means to assess the scale and nature of likely demand for employment land and the available supply in quantitative terms[2];
- Stage 3 – Identifying a 'new' portfolio of sites through a more detailed review of site supply and quality and identify and designate specific new employment sites in order to create a balanced local employment land portfolio.

2.23 During Stage 1, the guide suggests undertaking an initial appraisal process. Depending on local circumstances, the purpose of the Stage 1 appraisal is to:

- Confirm a selection of 'high quality' employment allocations which should, without doubt, be safeguarded for future employment use; and/or
- Assess the suitability of large, underused or vacant industrial sites for redevelopment or upgrading (for continued employment use); and/or
- Identify employment sites which clearly could be released for other uses.

2.24 In boxes 4.5 and 4.6, the guide identifies sets of criteria which can be applied to guide the Stage 1 appraisal. These are set out in Tables 2.1 and 2.2 below.

[2] Assessment methods identified include economic forecasting, consideration of recent trends and/or assessment of local property market conditions.

Table 2.1 - Criteria to Assess Whether Employment Sites are to be released

Criteria	Issues
Market Attractiveness Factors	Has the site been formally identified for employment for at least 10 years?
	Has there been any recent development activity, within the last 5 years?
	Is the site being actively marketed as an employment site?
	Is the site owned by a developer or other agency known to undertake employment development?
	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring forward for development?
	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?
	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?
Sustainable Development Factors	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/greenfield considerations)?
	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Strategic Planning Factors	Is the site within an area identified as of strategic importance to the delivery of the RSS/RES?
	Is the site identified or likely to be required for a specific user or specialist use?
	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?
	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable? Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?

Source: ODPM / CLG, 2004

Table 2.2 - Criteria to Identify 'High Quality' Allocated Employment Sites

Criteria	Issues
Market Attractiveness Factors	Has there been any recent development activity, within the last 5 years?
	Is the site being actively marketed as an employment site?
	Has there been any recent market activity?
	Is the whole site owned by a developer or another agency which undertakes employment development?
	Is development for employment viable, with any public funding if it is committed?
	Is the site immediately available?
Sustainable Development Factors	Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?
Strategic Planning Factors	Is the site within an area identified as of strategic importance to the delivery of the RSS/RES?
	Is the site identified or likely to be required for a specific user or specialist use?
	Is the site part of a comprehensive or long term development or regeneration proposal which depends on the site being developed for employment uses?
	Is the site important in delivering other economic development objectives or the spatial strategy?

Source: ODPM /CLG, 2004

2.25 The outcome of Stage 1 is the grading of sites, which enables the definite retention of the 'best' sites, further appraisal of other sites and clear definition of sites to be released.

2.26 Stage 2 identifies a range of complementary techniques to provide a quantitative estimate of future requirements for employment land and premises. It is stated that any quantitative assessment of employment land requirements, particularly for individual authorities, needs to be informed by the use of forecasts and surveys. The guide sets out a selection of methods for forecasting future employment levels and the translation of these forecasts to land and/or floorspace requirements. It is highlighted that quantitative assessment of employment land requirements are not reliable over the time horizons of RSSs. It is recommended that they be updated regularly at set intervals not to exceed five years.

2.27 Stage 3 of the appraisal process comprises the detailed site assessment and search. This stage should confirm which sites are likely to respond well to the expectations of occupiers and property developers and also meet sustainability criteria. The objective is to undertake a review of the existing portfolio of employment sites, against defined criteria. Further research for sites should also take place if required as part of the work in preparing the Site Allocations DPD. Table 2.3 sets out the criteria for assessing the quality, market demand and availability of existing employment sites.

Table 2.3 - Detailed Appraisal Criteria (Quality, Market Demand & Availability)

Criteria	Issues
Base Information	Site area, floorspace, vacant land etc.
Quality of Existing Portfolio & Internal Environment	Age & quality of buildings Noise and other obvious pollutants State of the external areas and public realm Parking, internal circulation and servicing
Quality of the Wider Environment	Adjacent land uses constraining operations or quality of uses on site Perception of the wider environment quality Local facilities for workforce
Strategic Access	Ease of access to main road network Proximity to rail, sea and air freight
Market Conditions / Perception & Demand	Strength of local demand in segment Recent market activity on site Likely market demand and viability of development without intervention
Ownership and User Constraints on Development / Redevelopment	Identify and number freehold owners Identity of leasehold or other occupiers, length of lease etc. Ransom strips or other known constraints on development
Site Development Constraints (undeveloped sites only)	Site access Topography, size and shape Utilities On-site environmental (nature conservation, trees, cultural heritage, landscape) Contamination / land stability / on-site structures Amenity of adjacent occupiers
Accessibility	Workforce catchment Access by public transport
Sequential test and Brownfield / Greenfield	Urban, urban edge or outside urban Previously developed in whole or part
Social and Regeneration Policy	Availability of other jobs locally Deprivation in local communities Priority regeneration designation Potential availability of ‘gap’ funding to develop Ability of site to support particular economic development priority
Other Policy Considerations	Alternative uses if no longer allocated for employment Other material policy considerations.

Source: ODPM / CLG, 2004

2.28 The detailed site appraisal should indicate whether or not there is a shortfall in the supply of land and premises for particular market segments. If this is the case, the criteria should be adjusted and used to identify ‘new’ employment sites.

2.29 When conducting ELRs, the Guidance Note also highlights the importance of taking into consideration the geography of functional economic markets and emphasises the need, where possible, to apply common approaches and methodologies amongst neighbouring authorities who are part of a single employment travel to work area and/or property market area.

2.30 Paragraph 5.11 states that ‘the principal difficulties faced by local planning authorities undertaking employment land reviews, especially at the district level, include building a meaningful picture of employment demand and supply. **(**There are two underlying problems: labour and property markets extending across district boundaries and the limitations of small area projections particularly over the time horizons required for development plans).

2.31 Paragraph 5.12 states that ‘This reinforces the need for regional and sub-regional analyses, interpreted locally, to provide a sound basis for policy and to identify a balanced portfolio of employment sites’.

2.32 Paragraph 5.14 states that ‘It is important from the outset to understand the nature of the local commercial property market in terms of both geography and market segments.

2.33 Paragraph 5.15 states that ‘The geography of local commercial property markets and employment has to be considered in two ways:

- the most appropriate boundaries for any aggregate analysis of demand and supply. For reasons of practicality, **these are usually defined as functional areas (for example based on travel to work areas) with sub-areas which can be aggregated to local authority boundaries**; and
- the locational and premises requirements of particular types of business and the extent to which one location can meet the needs of a mix of types of business.

Regional Policy Guidance

Integrated Regional Strategy (IRS)

2.34 The IRS Framework ensures that all regional policies and strategies are not prepared in isolation but in a compatible and integrated way to make them more sustainable. It draws together the key issues and challenges for the East Midlands, providing the overarching picture of what is happening in the region. By highlighting the vision, objectives and priorities for the region, the Framework ensures that there are better linkages and integration at both the policy development and implementation stages.

2.35 The region’s 17 sustainable development objectives included within this IRS Framework are overarching objectives. Those most relevant to this application are:

- **14 - To ensure that the location of development makes efficient use of existing physical infrastructure and helps to reduce the need to travel**
- 11. To create high quality employment opportunities and to develop a culture of ongoing engagement and excellence in learning and skills, giving the region a competitive edge in how we acquire and exploit knowledge

Regional Economic Strategy

2.36 The RES aims to build upon the success encountered by the previous strategies by providing an economic blueprint to lead the East Midlands up to 2020. It is the third strategy produced by EMDA and sets out how it will mobilise its resources and successfully engage people, businesses and organisations to maximise opportunities. The vision of the RES is to create a flourishing region- with growing and innovative businesses, skilled people in good quality jobs, participating in healthy, inclusive communities and living in thriving attractive places.

2.37 To enables the region to pursue this vision whilst not exacerbating the challenges of sustainable economic development for future generations, the ground breaking Regional Index of Sustainable Well Being has been developed to monitor r progress towards the twin aims of sustainable economic growth and economic well being. Underpinning the RES are three main themes:

- Raising productivity;
- Ensuring sustainability; and
- Achieving equality.

2.38 Northamptonshire's GVA per head is above the UK average, and it is the least deprived area in the East Midlands. It has a generally high employment and economic activity rate with close functional relationships with adjacent regions.

2.39 With regard to land use policy the RES main strategic priority for Land and Development Strategic Priority is to ensure that the quality and supply of development land, and balance between competing land uses, contributes towards sustainable growth of the regional economy. The RES states that 'While more peripheral greenfield locations appeal to many developers and employers, regional and local land use policies need to consider issues such as the potential for harm to biodiversity in the region, the provision of supporting infrastructure and the potential for increasing the need to travel if employment activity is increasingly located on the periphery. Indeed, it is highlighted that some Greenfield locations might be located in more sustainable locations than brownfield sites**.**

2.40 It goes on to say that '**Ensuring appropriate mixes of use is key to economically viable and sustainable communities, and in reducing the need to travel. It is also important to ensure a sufficient supply of a range of serviced sites and premises in the rural areas** to enable new businesses to establish and existing ones to expand to help ensure the continued success and viability of market towns and rural communities. **This will support the RES objectives of raising productivity and achieving equality, and will help reduce the need to travel to access employment and other services'.**

Regional Spatial Strategy

2.41 Published in March 2009, the East Midlands Regional Plan (also known as the Regional Spatial Strategy (RSS)) sets out a broad development strategy for the Region to 2026. It identifies the scale and distribution of new housing and priorities for the environment, transport, infrastructure, economic development, agriculture, energy, minerals, and waste treatment and disposal.

2.42 Policy 11 (Development in the Southern Sub-Area) highlights key spatial priorities for Northamptonshire:

- Northampton's role and function as one of the region's five Principal Urban Areas should be strengthened by new public transport infrastructure and facilities.
- The regeneration of Corby should be supported by a level of housing development that will significantly reduce the need for in-commuting.
- The roles of Kettering and Wellingborough as Growth Towns and Daventry as a Sub-Regional Centre should also be significantly strengthened.
- The roles of the small towns should be maintained through the retention of basic services and facilities and environmental improvements.
- The quality of villages should not be degraded by inappropriate growth.

2.43 The RSS places an emphasis on Local Planning Authorities (LPAs) to ensure that allocated sites for employment uses are consistent with priorities contained in the Regional Economic Strategy and are attractive to the market. A range of different sites should be provided and consideration should be given to enhancing marketability by means such as the provision of essential infrastructure, remediation or measures to enhance attractiveness. Local authorities should also consider whether currently allocated or safeguarded sites are likely to become surplus to future requirements.

2.44 Policy 20 (Regional Priorities for Employment Land) highlights that local authorities, emda and sub-regional strategic partnerships should work together in housing market area groupings to undertake and keep up to date employment land reviews to inform the allocation of a range of sites at sustainable locations.

2.45 These allocations will:

- Be responsive to market needs and the requirements of potential investors, including the needs of small businesses;
- Encourage the development of priority sectors as identified in the Regional Economic Strategy, namely transport equipment, food and drink, healthcare and construction as well as specific sectors which have local economic significance;
- Serve to improve the regeneration of urban areas
- Ensure that the needs of high technology and knowledge based industries are provided for;
- Promote diversification of the rural economy;
- Assist the development of sites in the Priority Areas for Regeneration; and
- Be on a scale consistent with the essential policy of urban concentration as set out in Policy 3.

2.46 The RSS highlights that, over the past 10 years, there has been a sharp increase in the demand for strategic distribution sites over 25,000 sqm, particularly in Northamptonshire and parts of Leicestershire. Emphasis is given to the need to maximise the potential for rail freight.

2.47 Based on the findings of the East Midlands Strategic Distribution Study, Policy 21 identifies HMAs where additional land for strategic distribution sites are priority locations for bringing forward sites which can be served by rail freight. These sites should be strategic in nature with the capacity to deliver significant distribution services. **Both North and West Northamptonshire are highlighted by Policy 21 as preferred locations where strategic distribution sites may be brought forward**.

2.48 Policy 22 (Regional Priorities for Town Centres) states that local authorities should bring forward retail, office, residential and leisure development opportunities, based on identified need.

2.49 Policy 24 (Regional Priorities for Rural Diversification) encourages local authorities to promote the continued diversification and further development of the rural economy, where this is consistent with a sustainable pattern of development and the environmentally sound management of the countryside.

2.50 The RSS states that market towns play a key role in the region’s rural areas, serving as centres for shopping, employment and service delivery. The future vitality of many rural areas will depend increasingly upon market towns. It is therefore crucial that the economic and service base of these settlements is consolidated and where appropriate enhanced.

2.51 Policy 25 (Regional Priorities for ICT) prioritises improving regional coverage of broadband and promoting the take up and use of ICT by businesses.

2.52 With regard to housing provision, the Plan highlights that two alterations have been made to those set out in the Milton Keynes and South Midlands Sub-Regional Strategy (see below). These alterations included adding figures for the period 2001-26 and replacing the figure for Northampton Implementation Area for the period 2001-2021 as the original figure has been quashed following a successful High Court Challenge in 2006. Accordingly, for the period 2001-2026, the Plan makes provision for:

- 66,075 additional dwellings in North Northamptonshire; and
- 62,125 additional dwellings in West Northamptonshire.

2.53 The Government required that a Partial Review Regional Plan be undertaken on a limited set of issues relating to housing, transport and climate change. In October 2008, the Assembly consulted on a Project Plan for the Partial Review, along with a range of supporting documentation. In line with the amended Project Plan, the Assembly will launch an 'options consultation' on key issues to run for 14 weeks between the 30 June 2009 and the 6 October 2009.

Milton Keynes and South Midlands Sub-Regional Strategy

2.54 Milton Keynes and South Midlands (MKSM) covers parts of the South East, East of England and the East Midlands and forms part of the East Midlands Regional Plan. The strategy refined the strategic objectives of the Sustainable Communities Plan to address the specific priorities of the sub-region. These included the aims of:

- gaining significant economic and investment benefit through operating in a more cohesive way across a sub-region that covers parts of three larger regions;
- concentrating growth at the main urban centres in the sub-region where urban renaissance can be achieved and regeneration needs tackled; and
- developing higher value employment and skills across the sub-region to maximise prosperity.

2.55 One of the key objectives of the MKSM strategy is to:

'…provide for a commensurate level of economic growth [with planned housing growth], particularly in the high-value, knowledge-based sectors'.

Over the 30 year period to 2031, the Sustainable Communities Plan highlights the aspiration of creating up to 141,000 additional jobs (and 167,000 additional dwellings) in Northamptonshire. The majority of development is to be focused in Northampton and Corby/Kettering/Wellingborough with other development taking place in the Sub-Regional Centre of Daventry and in other smaller towns.

2.56 The Strategy sets a number of housing targets to be achieved by 2021. In North Northamptonshire, a target of 52,100 new homes is set. Of this total, land in the three Growth Towns is to be provided for 34,100 new dwellings. Between 2021 and 2031 the Growth Towns could see a requirement for an additional 28,000 new homes.

2.57 Beyond the Growth Towns, development in North Northamptonshire should be focused at Desborough, Rothwell, Burton Latimer, Rushden, Higham Ferrers, Irthlingborough, Oundle, Raunds and Thrapston.[3]

2.58 The target for West Northamptonshire is a total of 47,400 new dwellings in the period up to 2021. It was originally stated that 30,000 of these houses should be concentrated in Northampton, but this figure was quashed by the High Court in January 2006. It has since been recommended that

[3] Northamptonshire Policy 1: The Spatial Framework

the figure is altered to 31,500 new homes.[4] Outside of Northampton, development is to be focused at Daventry town, Towcester and Brackley.

2.59 The Strategy also gives guidance on employment growth. It is stated that housing growth should be monitored against achieving growth of 43,800 jobs in North Northamptonshire and 37,200 jobs in West Northamptonshire. These figures are not intended to be targets and not meant to constrain economic development.

2.60 Beyond giving jobs reference targets, employment in Northamptonshire is referred to in some of the Northamptonshire-specific policies. In Northampton, local development documents should:

'provide an adequate choice of high-quality employment sites for targeted office and high-value knowledge based industries and for existing key sectors, making a realistic assessment of the prospects for continuing use of older sites and including an appropriate degree of mixed use on suitable sites, both new and existing.'[5]

2.61 The strategy highlighted that Northampton should continue to grow in stature as an important regional centre and as the main centre for Northamptonshire sub-area. This would require an increase in quality employment opportunities through B1 office development with an emphasis on high-value knowledge-based industries. It was also highlighted by the strategy that this should include continued support for existing centres of excellence (e.g. high value logistics, print & design and cultural tourism). Additionally, prestige HQ / inward investment sites should be promoted.

2.62 The MKSM SRS Policy Northamptonshire 3, makes reference to the Northampton Central Area. Included in the policy is the requirement to make the Central Area the focus of a range of employment opportunities with a particular emphasis on offices, through the provision of large office space through to small office suites in both new and converted document.

2.63 Provision of new quality B1 premises was also identified as a priority for Corby, Kettering and Wellingborough. Whilst the emphasis should be on diversifying the local economies, support should also be given to maintaining and enhancing the competitiveness of the existing manufacturing base. Sectors identified with growth potential include: performance automotive, food and drink, and high value elements of logistics and tourism.

2.64 Daventry was identified as a sub-regional centre which will create the need for some growth in employment for the town's expanding population.

2.65 Additional employment land provision was identified in the strategy as an integral element of the sustainable urban extensions planned for Northampton, Corby, Kettering, Wellingborough and Daventry.

Northamptonshire Policy

North Northamptonshire Local Development Framework

2.66 A joint Local Development Framework (LDF) currently is being prepared for East Northamptonshire, Corby, Kettering and Wellingborough Councils (collectively known as North Northamptonshire). The North Northamptonshire Joint Planning Unit (JPU) was set up in 2004 to co-ordinate the production of the plans needed to deliver sustainable development in North Northamptonshire over the period up to 2021, and is responsible for the development of the Core Spatial Strategy for North Northamptonshire.

[4] Draft East Midlands Regional Plan (2006)
[5] Northamptonshire Policy 2: Northampton Implementation Area

North Northamptonshire: Core Spatial Strategy

2.67 The North Northamptonshire Core Spatial Strategy was adopted in June 2008 and addresses the growth requirements, in terms of new homes and jobs set out in the Regional Strategy and MKSM growth strategy up to 2021.

2.68 The Vision established by the Core Strategy for North Northamptonshire is follows:

'North Northamptonshire in 2021 will be a better place: a showpiece for modern green living within a high quality environment and a prosperous economy. A step change of growth in homes and jobs will have been matched by investment in infrastructure, services and facilities, creating a more self sufficient area, better able to meet the needs of local people and to play an enhanced role in the UK'.

'A strong network of vibrant settlements with excellent transport connections will have developed through growing and regenerating the towns of its urban core and strengthening the centres that serve the rural east. These settlements, set within an enhanced green framework of living, working countryside will work together to provide accessible jobs services and facilities to meet the needs of the growing population'.

2.69 The vision and objectives are grouped into seven key spatial themes that underpin the Plan which include:

- A – Establishing a strong network of settlements that make North Northamptonshire more **self-sufficient in terms of access to jobs**, shops, leisure, arts and culture, affordable homes and services such as education and training. **The general approach will be to meet needs as locally as possible**.
- B - Ensuring that these settlements are well-connected within and to each other and to places outside North Northamptonshire, **with an emphasis on providing greater transport choice to support a modal shift away from reliance on use of the private car**. This will mean planning communities in a way that makes public transport, walking and cycling attractive alternatives to car use for many people.
- F - Delivering **economic prosperity through the provision of high quality employment sites and the enhancement of the local skills base**.
- G - The distribution of new development to reflect the current and planned roles for the towns and rural areas.

2.70 Policy 1 (Strengthening the Network of Settlements) aims to achieve greater self-sufficiency for North Northamptonshire as a whole. Development will be principally directed towards the urban core, focused on the three Growth Towns of Corby, Kettering and Wellingborough. The smaller towns of Burton Latimer, Desborough, Higham Ferrers, Irthlingborough, Rothwell and Rushden will provide secondary focal points for development within this urban core. The emphasis will be on regeneration of the town centres, through environmental improvements and new mixed use developments, incorporating cultural activities and tourism facilities, in order to provide jobs and services, deliver economic prosperity and support the self sufficiency of the network of centres. New sustainable urban extensions to the growth towns will provide major locations for housing and employment growth and reinforce the roles of these settlements.

2.71 Development in the rural north east will be mainly directed to a rural service spine comprising the Rural Service Centres of Oundle, Raunds and Thrapston, with a secondary focus at the Local Service Centre of King's Cliffe. This will be supported by the regeneration of Raunds town centre, the enhancement of Thrapston and Oundle town centres and improvements to public transport to link the service centres with their wider hinterlands.

2.72 In the remaining rural area development will take place on sites within village boundaries, subject to criteria to be set out in development plan documents. Development adjoining village boundaries will only be justified where it involves the re-use of buildings or, in exceptional circumstances, if it can be clearly demonstrated that it is required in order to meet local needs for employment, housing or services. Development will be focussed on those villages that perform a sustainable local service centre role.

2.73 Policy 8 (Delivering Economic Prosperity) aims to

- Maintain a broad balance between homes and jobs.
- Diversify the economy.
- Make and safeguard allocations for specific employment use classes.
- Invest in education and training.

2.74 The Policy sets out the aim of creating 47,400 new jobs during the period 2001 to 2021 of which B use jobs should comprise:

- Offices - 11,190;
- Strategic distribution – 9,440; and
- General industrial – 2,960.

2.75 Table 2.5 sets out the future distribution of these jobs by district (Policy 11).

Table 2.4 – Policy 11: Distribution of Jobs Provision 2001-2021

	Net Jobs Growth (all sectors)	General Industrial	Strategic Distribution	Offices
North Northamptonshire	47,400	2,960	9,440	11,190
Corby	13,580	1,900	3,640	2,450
East Northamptonshire	5,220	-420	840	2,330
Kettering	16,200	1,120	1,870	3,260
Wellingborough	12,400	360	3,090	3,150

2.76 Policy 11 highlights that:

- Suitable employment sites will be safeguarded whilst unsuitable sites should be de-allocated;
- New sites will be allocated to address shortfall in supply, within or adjoining existing urban areas, in SUEs or areas that have a low jobs / workers balance and are accessible by a choice of means of transport;
- New sites in rural areas will be located at rural / local service centres;
- The preferred location for office development is town centres and locations with good public transport links;
- Large-scale strategic distribution will be concentrated at Euro-hub in Corby whilst smaller-scale sites should be located close to the strategic transport network, preferably served by rail or water;
- Sites in each of the growth towns will be identified to meet the aims of the Technology Realm initiative;

- Diversification of the rural economy will be supported.

2.77 Policy 9 (Distribution and Location of Development) states that 30% of new housing should be provided upon previously developed land and within urban areas although this will vary significantly between authorities. Further development will be focused on Sustainable Urban Extensions (SUEs) in the growth towns, with possible smaller scale SUEs at the smaller towns and rural service centres.

2.78 Policy 16 of the Core Strategy sets out what all Sustainable Urban Extensions should contain and how they should be brought forward. It specifically identifies the need to incorporate employment opportunities alongside social and community facilities within the planned new housing growth, to assist in the development of new neighbourhoods and to give residents a sense of place and local identity. To achieve these objectives it requires all Sustainable Urban Extensions to be brought forward through a masterplan led approach.

2.79 During the EiP process, the Inspector highlighted that a further assessment of employment needs should take place and that an early review of the Core Strategy should take place.

West Northamptonshire

2.80 The West Northamptonshire Joint Planning Unit is currently developing a Joint Core Strategy for West Northamptonshire, and the three local authorities in West Northamptonshire are preparing their respective Local Development Documents, as set out in the adopted Local Development Scheme 2008. An Issues and Options Paper was consulted on in 2007 using jobs figures from the MKSM SRS. The main economic objective put forward is to strengthen and diversify the economic base of West Northamptonshire, in particular taking advantage of opportunities for knowledge based industries.

District / Borough Policy Context

2.81 A number of historical Local Plan Policies are in the process of being replaced through the emerging Local Development Frameworks being developed around the county. However, there are a number of saved Local Plan policies that still have statutory weight relevant to economic development and site allocations.

Corby

2.82 The Corby Community Strategy (2003-2008) included a number of key objectives for the local economy as follows:

- Establish Corby as a regional centre by attracting major businesses to the area.
- Develop a high-tech engineering sector.
- Improve the skills of the local workforce.
- Encourage entrepreneurship.

2.83 Corby Borough Council has made significant progress in developing Local Development Documents, including the publication of preferred option reports for the Site Specific Proposals DPD, Town Centre Area Action Plan and Kingswood Area Action Plan. Each of these plans is at different stage of preparation but all strongly support the diversification of the economy.

2.84 The Site Specific Allocations DPD recognises that the economy and employment are critical aspects of Corby's growth and regeneration agenda. New allocations are required for a variety of business uses which need to be balanced with housing growth and employment to ensure that overall growth remains balanced but, more importantly, to recognise that economic growth is a key measure to stimulate the local housing market.

2.85 Consultation on the Issues and Options during the plan preparation stage identified that there is a need to enhance the image of Corby. The Site Specific Allocations document states that one way of achieving this would be by encouraging the diversification of employment opportunities and skills in the area. The North Northamptonshire Preferred Options (November 2005) indicates that there is support for this approach.

2.86 The document also recognises that increasing the range of employment opportunities in Corby would not only diversify its economy but also increase the potential for inward investment. However, close attention needs to be given to the viability and range of considered employment opportunities in order to ensure that the potential for successful regeneration and growth is optimised.

2.87 The Corby Town Centre Area Action Plan identifies that new council offices will be focussed within a new Civic Hub within the Parkland Gateway development. There are also opportunities for additional office development as part of wider mixed use schemes within the town centre.

2.88 The Kingswood Area Action Plan recognises that there is a need for employment diversity within Kingswood, as well as across the whole Borough. The Plan states that opportunities presented by the expansion of the Rockingham Motor Speedway into Corby and the subsequent appearance of niche markets such as 'Motorsport Valley' should be capitalised upon and key economic drivers.

2.89 The Corby Employment Land and Buildings Study (2005) recognised that Corby would need to provide for considerably fewer jobs under a market-led scenario. As such, the study concluded that more inward investment would be needed if Corby was to expand and renew its economy.

2.90 The Study also recommended that Corby should take steps to attract different types of employment to the area including higher-value, white-collar employment. However, it was highlighted that the scale and phasing of office development needs to be realistic. Despite emphasising that economic diversification should be long rather than short-term goal, the study maintained that the planning authority makes provision for attractive office sites.

2.91 In terms of employment sectors, the study recommend that Corby should building on its existing strengths as an industrial location. However, it was also recommended that Corby aims for higher-value employment as well as market niches that are less vulnerable to global competition.

2.92 The study also emphasises the potential for rail freight expansion in Corby.

East Northamptonshire

2.93 East Northamptonshire Council's **Sustainable Communities Strategy 2008 – 2015** sets out a vision to create a network of thriving communities across the district, through achieving the following economic outcomes:

- Reduced deprivation;
- Increased skilled job opportunities;
- Higher educational attainment

2.94 The **Rural North Oundle and Thrapston Plan** was submitted to the Secretary of State in January 2008. This is the first of East Northamptonshire Council's three site allocations DPDs and covers approximately 80% of the District's geographical area. It has been through a rigorous independent examination process since submission; the final Inspector's report (received 8 July 2009) finding the DPD to be "sound" . However, as yet the Council has not adopted the Plan as a Development Plan Document and as such the Council is still treating the document as emerging policy. Key themes emerging from this include the needto:

- Safeguard employment sites.
- Identify new locations for small and medium sized (SME) businesses.

- Promote opportunities for office based activities.
- Improve workforce skills, matching them to those required by local businesses.
- Positively planning for 'green' tourism and leisure developments.

2.95 The East Northamptonshire Employment Land Review 2006 (ELR) recommended strong policies supporting regeneration initiatives as well as maximising the use of existing employment land resources. The review recognised that the demand for B8 in the District is likely to be strong. However, it argues that the local employment land market should not be saturated by B8 development, in order to encourage economic diversification and protect the rural nature of the District.

2.96 The study concluded that, in total, an estimated 39ha of land would be required to support employment growth up to 2026 and recommended that the LDF ensure that the range of employment sites available offer a sufficient choice and diversity for both indigenous and inward investment needs. Strong policies and supporting regeneration initiatives should be introduced to assist in facilitating an improvement in the quality of employment floorspace provided through existing employment land in the District (through intensification, upgrading and redevelopment).

2.97 In order to ensure that there is sufficient choice and a range of good quality employment land opportunities for local and strategic businesses, the study recommended that 'the Council consider the allocation of additional (new) employment land, in order to ensure a good quality reserve of employment land which can contribute to long-term needs arising in the later stages of the LDF period'. The study estimated that new reserve allocations 'amounting to approximately 25 hectares is provided for this purpose (in addition to recommended retained allocations described above).

2.98 The ELR justifies the protection of employment in rural locations as well as rural diversification and increasing the availability of sites for small businesses.

2.99 The south of East Northamptonshire District is divided into two Plan areas: the **Three Towns** (Rushden, Higham Ferrers and Irthlingborough) and **Raunds**. These site allocations DPDs add to the policy framework set out by the CSS, by providing more site specific detail.[6] These emerging DPDs, which have currently reached their "Preferred Options" stages (September 2006 and January 2007 respectively), identify sites for housing, employment and other land uses in Rushden, Higham Ferrers, Irthlingborough, Raunds and the surrounding villages:

- Diversification of the economy.
- Reduction in out-commuting.
- Encouraging investment from internal and external sources.
- Match skills of the local labour force to existing and emerging employment opportunities.
- Promote a flexible, knowledge-based economy.
- Supporting town centre regeneration, with particular reference to Rushden, Irthlingborough and Raunds.

2.100 The DPDs for the Three Towns and Raunds consider significant employment land allocations, as part of mixed-use urban extensions at Higham Ferrers and Raunds. A further employment land allocation is proposed to the north of Irthlingborough (adjacent to Nene Park/ Diamond Way), while major existing employment areas to the east and west of Rushden will be safeguarded.

[6] These documents are due to be submitted in early 2010.

Kettering

2.101 The Kettering Employment Study (2005) concluded that:

- High quality office based headquarter / high-tech office sites should be provided in North Kettering;
- Economic development should be encouraged along the Wellingborough to Kettering to Corby transport corridor.

2.102 A preferred options document for the Kettering Town Centre Area Action Plan (AAP) was issued in 2008. This is helping to shape options for economic development for Kettering as follows:

- Develop an employment quarter adjacent to the railway station.
- Ensure high-quality employment land provision as part of any significant new housing development.
- The A14 scrap-yard site to be redeveloped for business uses.
- Employment (B1) including flexible space and starter units of up to approximately 38,000 sq m should be provided in the town centre (up to 2021).

2.103 A Position Statement document has also been issued for Rothwell and Desborough Urban Extension AAP. The Position Statement proposes no further employment land allocation for Desborough beyond that already granted consent at Magnetic Park. For Rothwell, it proposes 4ha. of B1/B2 uses as a part of a 700 dwelling sustainable urban extension. The amount of employment land required for the towns has recently been reduced, the aims of increasing employment opportunities and diversifying the economy remain.

2.104 In February 2009, Kettering Council issued a Site Specific Issues paper for consultation.

Wellingborough

2.105 The Wellingborough Employment Study (2006) concluded that:

- It is worthwhile seeking investment in vertically integrated sites (B1/B2/B8) as opposed to purely B8 “sheds”.
- Higher quality B2 sites than are currently available are needed to meet the market demand for high-tech manufacturing.
- Brownfield sites located in the existing town are generally a high priority for delivery. However, some may need intervention funding, whilst B1 town centre sites are limited and may be allocated for retail.
- Attracting prestige/headquarter B1 enterprises to Wellingborough is a priority,
- Identifying the location of future growth including strategic road improvements and allocating housing and employment at SUES are important.

2.106 The Wellingborough Town Centre AAP has been prepared and has been through Public Examination.

Daventry

2.107 Daventry’s Sustainable Community Strategy (2006) prioritises the diversification of the district’s rural economy, as well as the improvement of residents’ skills and qualifications.

2.108 The MKSM Strategy Policy for Daventry stipulates that the majority of Daventry’s growth will have to occur at greenfield urban extensions. It also recognises that Daventry requires a more diverse employment base, with the workforce to receive complementary skills training. It also promotes future employment growth and investment through green technology development.

2.109 The Daventry Town Centre Masterplan provides a holistic vision for the redevelopment of the town, which includes a clear focus on encouraging employment and retail growth.

Northampton

2.110 Northampton's Sustainable Community Strategy (2008-2011) highlights the following key economic priorities:

- Become a major regional economic centre by 2031.
- Increase the skills base of local people.
- Strengthen and diversify the economy, including providing more opportunities for knowledge-based activities,

2.111 The West Northamptonshire Joint Core Strategy Issues and Options Paper sets out the aim for Northampton to become a specialist knowledge-based employment centre. It proposes that the Northampton central area becomes the focus of a range of employment opportunities, with particular emphasis on office development.

2.112 The Northampton Employment Land Study (2006) recognised that there is a shortage of land for local SME businesses looking to expand. Allocations should be made if possible "adjacent to existing estates where existing road infrastructure and public transport exists." In addition, the study maintains that it is imperative that town centre sites are retained for high quality office uses, and that other town centre extension sites are brought forward for development.

2.113 In addition, the Northampton Employment Land Study puts forward five potential employment areas for consideration: extension to Brackmills; extension to Pineham; extension to Milton Ham, Upton and the town centre.

2.114 In line with MKSM policy, the Central Area Action Plan (CAAP) is being progressed in accordance with the requirements set out in the RSS and the LDS (Nov 2008).

2.115 The recently produced Northampton Economic Regeneration Strategy (2008-2026) is supported by the Local Strategic Partnership. It recommends developing more town centre offices with the capability of attracting high knowledge sectors. Head offices/regional offices should also be attracted to the town centre or at gateway sites.

2.116 Whilst manufacturing is declining nationwide, the Strategy proposes a focus upon high performance engineering, the high value leather industry and recycling.

2.117 The benefits of strategic warehousing to Northampton are recognised. However, the Strategy identifies the importance of managing the land effectively, so that "higher density, higher skilled job opportunities are not lost from weak planning decisions."

2.118 Finally, the Strategy highlights the following overall target industries:

- Consultancy;
- Recycling / Recovery / Sustainable Emerging Technology;
- High value manufacturing / Transport equipment;
- Construction;
- Health / healthcare;
- Food and drink;
- Overseas industry looking for a UK base.

South Northamptonshire

2.119 Towcester and Brackley Urban Capacity Study (2005) recommends retaining employment allocation in the urban area of Towcester in order to stay in line with the principles of sustainability. Masterplans are being developed for Towcester and Brackley which will inform the LDF.

2.120 In terms of sectors, the West Northamptonshire CSS targets the area around Silverstone as a focus for knowledge based, research and high technology industry. A Masterplan for Silverstone has been adopted which will provide the framework for directing future development at this internationally significant facility.

Strategic Northamptonshire Economic Action Plan (SNEAP)

2.121 Issued in February 2008, the draft SNEAP established a range of strategic objectives and preferred economic vision for the county:

- To achieve productivity improvements across the whole county with a focus on key sectors highlighted in other strategies and plans for the County.
- For North Northamptonshire, achieve a step change in its ability to create jobs in order to deliver a planned amount of 47,400 jobs for the period 2001-21.
- For West Northamptonshire, achieve a jobs growth level of 53,000 jobs between 2001 and 2021.
- Achieve a sustainable distribution of economic growth through the alignment of jobs growth with housing developments which are focussed in the urban areas of Northampton, Corby, Kettering and Wellingborough.

2.122 The SNEAP makes it clear that without significant interventions from the public sector, the county will fall short of its targets for a prosperous and successful sub-region. For example, in North Northamptonshire the SNEAP indicates that there would be a jobs-gap of 18,900 without additional interventions from the public sector.

2.123 Consequently, as with CoPELA 2006, the SNEAP reinforces the rationale and ongoing need for Programmes such as Fit for Market and Technology Realm to assist in facilitating the growth of good quality, employment-generating floorspace in Northamptonshire.

2.124 To conclude, the rationale which supported the Programme at its conception remains as relevant in 2008 as it did in 2003. To summarise, this reflects the ongoing need for proactive public sector intervention to:

- Create and safeguard employment opportunities for the existing and future population of Northamptonshire, particularly in the growth areas of Northampton/Daventry/Towcester urban areas, Wellingborough, Kettering and Corby with a particular emphasis on town centre sites;
- Provide opportunities for increasing the diversification of the County's local economies including the attraction of knowledge intensive businesses;
- Contribute to urban regeneration in the County by re-using derelict and under-used brownfield sites and facilitating the development of these sites;
- Assisting new business start-ups and expansion of existing businesses, particularly SMEs; and
- Complement other priorities identified in the CoPELA studies.

2.125 SNEAP also identifies priority sectors for promoting and development in North and West Northamptonshire (see Table 2.4).

Table 2.5 – SNEAP Sectoral Priorities for the Preferred Economic Scenario

High performance engineering	Food and drink	Print and Publishing
Construction	Logistics	Professional Services
Public Services	Environmental Technologies	Healthcare
Leather	Financial Services	ICT
Tourism	Creative Industries	

CoPELA

2.126 The CoPELA study was updated in 2006 as an interim review of the 2003 study. This report reiterates the MKSM growth objective of providing 81,000 new jobs in Northamptonshire over the period 2001-21. It updated the policy position which includes the following key documents:

- The Regional Spatial Strategy (RSS8) incorporates the MKSM strategy and confirms the growth targets for Northamptonshire established in the sub-regional strategy.
- The Northamptonshire Land Futures Study (2005) reflects the MKSM strategy and endorses the policy-led growth scenario set out in CoPELA 2003 which seeks to redistribute employment growth from the west to the north of the County.

2.127 The study concluded that the total B use class requirement in Northamptonshire will amount to 42,000 net additional jobs for the period 2001-21. This equates to around 1.72 million of net additional business space, comprising:

- 513,000 sqm net additional office floorspace;
- No net change in industrial (B2) floorspace; and
- 1.2 million sqm net additional strategic warehousing floorspace.

2.128 Despite a theoretical quantitative supply capacity to meet this need, the report highlights that a significant shortfall exists in real terms given that much of the existing commitments are either of a poor / unsuitable quality or will not come forward to the market.

2.129 Consequently, the 2006 CoPELA study reconfirmed the need for public sector intervention to facilitate the necessary job growth in Northamptonshire. .

2.130 CoPELA recommended that development plan documents should allocate an additional five years worth of forecasted employment land demand, which equates to 25% of the demand for the plan period 2001-21. CoPELA argued that this margin of 'over-supply' should be available at all times during the plan period. In addition, employment land gains and losses should be monitored against these requirements in order to inform policy reviews and individual planning decisions.

2.131 The report analyses the benefits and drawbacks of the market pressures for strategic warehousing. It warns against an excessive amount of this kind of development in that it potentially undermines one of MKSM's key objectives to encourage more high-skilled, high-earning jobs. Consequently, it was suggested that planning authorities examine areas in order:

"to see where warehousing is liable to displace office development on the best sites, and conversely where it is likely to support office development by paying for joint infrastructure."

2.132 The report highlights that there is a local need for smaller-scale warehouse facilities, sites for which should be considered by planning authorities in addition to strategic warehousing.

2.133 The report goes on to note that the growth area employment requirements of introducing more higher-value activities can only be met if there is a suitable level of investment in infrastructure and environmental improvements. In addition, the report mentions that for offices, "a certain amount of speculative development [needs] to be undertaken which will require a supply to be available in excess of the demand forecasts."

Key Messages – Implications for SELA

2.134 The policy review raises a number of key strategic issues of importance to SELA. These are summarised below:

- In planning for economic development, the consultation paper on PPS4 strongly emphasises the need for local authorities to take a proactive and flexible approach. This is important to ensure that local authorities can respond quickly and efficiently to changing business needs.
- PPS4 highlights the need to develop policies from a robust evidence base.
- PPS4 emphasises the need for local authorities to allocate a range of sites and to plan for a broad range of business types. It emphasises the importance of avoiding automatic allocation of sites from one development plan to the next. Where there is no reasonable prospect of such sites been taken up for their intended use, local authorities should consider de-allocation from employment.
- Economic activities in rural areas play a significant part in economic development in England Economic development in rural areas should be focused on local service centres and diversification of rural economies should be encouraged whilst having regard to scale and environmental impact. .
- Draft PPS4 places significant emphasis on encouraging economic development in town centres as part of a rounded, mixed-use approach to ensuring future vitality and viability.
- The Government's Guidance Note on ELRs highlights the limitations of forecasting future business and employment needs at the level of individual local authorities. Moreover, it stresses that the most appropriate boundaries for any aggregate analysis of demand and supply should reasonably reflect the geographical markets in which businesses operate. For reasons of practicality, these are usually defined as functional areas (for example based on travel to work areas) with sub-areas which can be aggregated to local authority boundaries.
- As a Principal Urban Area, the RSS highlights the importance of Northampton's role in driving growth in the County through both housing and employment development. This should be complemented by enhancement of public transport infrastructure and facilities. The tightness of the town's boundaries requires that a strategic and coordinated approach needs to be taken to the planning and delivery of this longer term growth.
- The RSS stresses that the regeneration of Corby should be supported by a level of housing development that will significantly reduce the need for in-commuting. As Growth Towns, the development roles of Kettering and Wellingborough will also be enhanced as will Daventry's role as a Sub-Regional Centre.
- Policy 20 of the RSS emphasises the importance of employment allocations being responsive to market needs and the requirements of potential investors (including small businesses). These allocations should also provide for the needs of priority sectors identified in the Regional Economic Strategy and provide a catalyst for the regeneration of urban areas.
- Policy 21 of the RSS establishes the potential for the provision of strategic distribution sites in Northamptonshire during the plan period. It highlights that the North and West Northamptonshire are among the preferred locations for these sites. The policy outlines that in allocating sites in Local Development Documents, local authorities should give priority to sites which can be served by rail freight and operate as intermodal terminals.

- The MKSM sub-regional strategy aims to provide for high-value economic growth which is commensurate with planned housing development. Over the 30 year period to 2031, the strategy uses a monitoring figure of up to 141,000 additional jobs (against a target of 167,000 additional dwellings) in Northamptonshire. .
- The SNEAP builds on the MKSM strategy and sets out a preferred economic vision for Northamptonshire. This focuses on raising productivity and accelerating employment growth in a range of business sectors. For North Northamptonshire, SNEAP aims to achieve a step-change in its ability to create jobs in order to deliver a planned amount of 47,400 jobs for the period 2001-2021. For West Northamptonshire, the aim is to achieve jobs growth amounting to 53,000 over the same period. These job ‘targets’ are widely accepted in the county as the basis for future strategic policy development.
- The SNEAP makes it clear that without significant interventions from the public sector, the county will fall short of the job growth ‘targets’ which form part of the preferred economic vision.
- The adopted Core Strategy in North Northamptonshire has established the spatial vision for the development of this part of the county. This strategy is significant in taking forward key aspects of the East Midlands Plan in North Northamptonshire. It plans for growth through the development of a strong network of settlements linked by good transport connections and emphasises the importance of matching housing growth with economic growth. Planning for a total of 47,400 new jobs in the period up to 2021, the Core Strategy identifies that 23,590 of these will be B-use jobs. A spatial distribution of jobs growth across the area is also set out in the Strategy.
- The SELA will provide a common evidence base to inform LDFs in both North and West Northamptonshire, but also importantly, it will support spatial planning in the county and the employment land policies and activities of NEL, WNDC, NNDC and the county and district councils in securing funding and delivery of infrastructure to support sustainable economic growth.

3. Economic Baseline & Functional Analysis

Introduction

3.1 In accordance with guidance set out in the consultation paper on PPS4, this Section provides an overview of prevailing socio-economic conditions in Northamptonshire. It aims to provide the economic context to employment land demand and supply factors in the county. Responding to Government Guidance which emphasis the importance of using meaningful economic areas when planning for economic development, this Section also provides an analysis of Northamptonshire's functional economic geography. This primarily is based on analysis of travel-to-work data.

Employment Structure

3.2 Table 3.1 sets out total employment estimates in Northamptonshire at 1998 and 2007. The table demonstrates that Northampton has by far the largest economy of all the seven local authorities, with over 125,000 jobs in 2007. Each of the other local authorities has a significantly smaller economy with between 25,000 and 35,000 jobs in each.

3.3 The table also demonstrates the level of employment growth within each local authority between 1998 and 2007. The largely rural authorities of South Northamptonshire, East Northamptonshire and Daventry have seen the largest growth in this period, although they each started from the smallest base. The number of jobs grew by 17.6% in Northampton, which is equal to nearly 20,000 jobs and is by far the largest absolute growth of any of the authorities within the county. By contrast, Corby's economy grew by just 2.1% in the same period and Wellingborough's declined by 2.9%.

Table 3.1 - Total Employment by Local Authority 2007

	Total Employment 1998	Total Employment 2007	% Growth (1998-2007)
Corby	29,834	30,461	2.1
Daventry	25,410	34,266	34.9
East Northamptonshire	19,344	25,604	32.4
Kettering	30,324	35,939	18.5
Northampton	106,797	125,629	17.6
South Northamptonshire	19,791	27,388	38.4
Wellingborough	33,121	32,158	-2.9
Northamptonshire	264,621	311,446	17.7

3.4 Figure 3.1 illustrates the structure of the economy by broad sector (as of 2007) for each of the local authorities within Northamptonshire. It shows that the county has a larger proportion of manufacturing employment compared to the national average, which is at a similar level to the East Midlands region as a whole. Northamptonshire also has a larger proportion of employment within the transport, storage and communication sector than both England and the East Midlands, which reflects its excellent links to the M1, A14 and A45. The proportion of people employed within the financial intermediation and real estate, renting and business activities sectors is roughly similar to that of England, but is larger than that of the East Midlands.

3.5 Northamptonshire also has a smaller proportion of employment from within the public sector, such as within education, health and social work, than England and the East Midlands.

3.6 Figure 3.1 also demonstrates that there are some significant differences in the structure of Northamptonshire districts. Some of the key structural issues are described below.

Manufacturing

3.7 There are significant differences within the county in terms of the proportion of manufacturing jobs. Corby, with its strong industrial heritage, has over three times the proportion of manufacturing jobs than Northampton. Nearly a third of Corby's labour force is employed in the manufacturing sector, whilst only 10% are employed within this sector in Northampton. This highlights the very different economic roles played by Northampton and Corby, which are at the centre of the two Travel-to-Work-Areas (TTWAs) in Northamptonshire.

3.8 The proportion of manufacturing employment within each of the remaining five local authorities does not differ to the same extent, accounting for between 13% and 19% of all employment.

Construction

3.9 The proportion of employment within the construction sector does not vary significantly between authorities. Northampton has the lowest proportion of construction jobs, at around 4% of total employment, whilst South Northamptonshire and East Northamptonshire have around 7% of the labour force employed within this sector.

Wholesale and Retail

3.10 There are no significant differences between authorities within the wholesale and retail sector, with this sector representing roughly 20% of total employment in all authorities with the exception of South Northamptonshire, where the sector is less significant (12% of total employment).

Hotels and Restaurants

3.11 The proportion of employment within the hotels and restaurants sector does not vary greatly between authorities. Corby has the lowest proportion of construction employment, at around 4% of total employment, whilst South Northamptonshire has around 7% of the labour force employed within this sector.

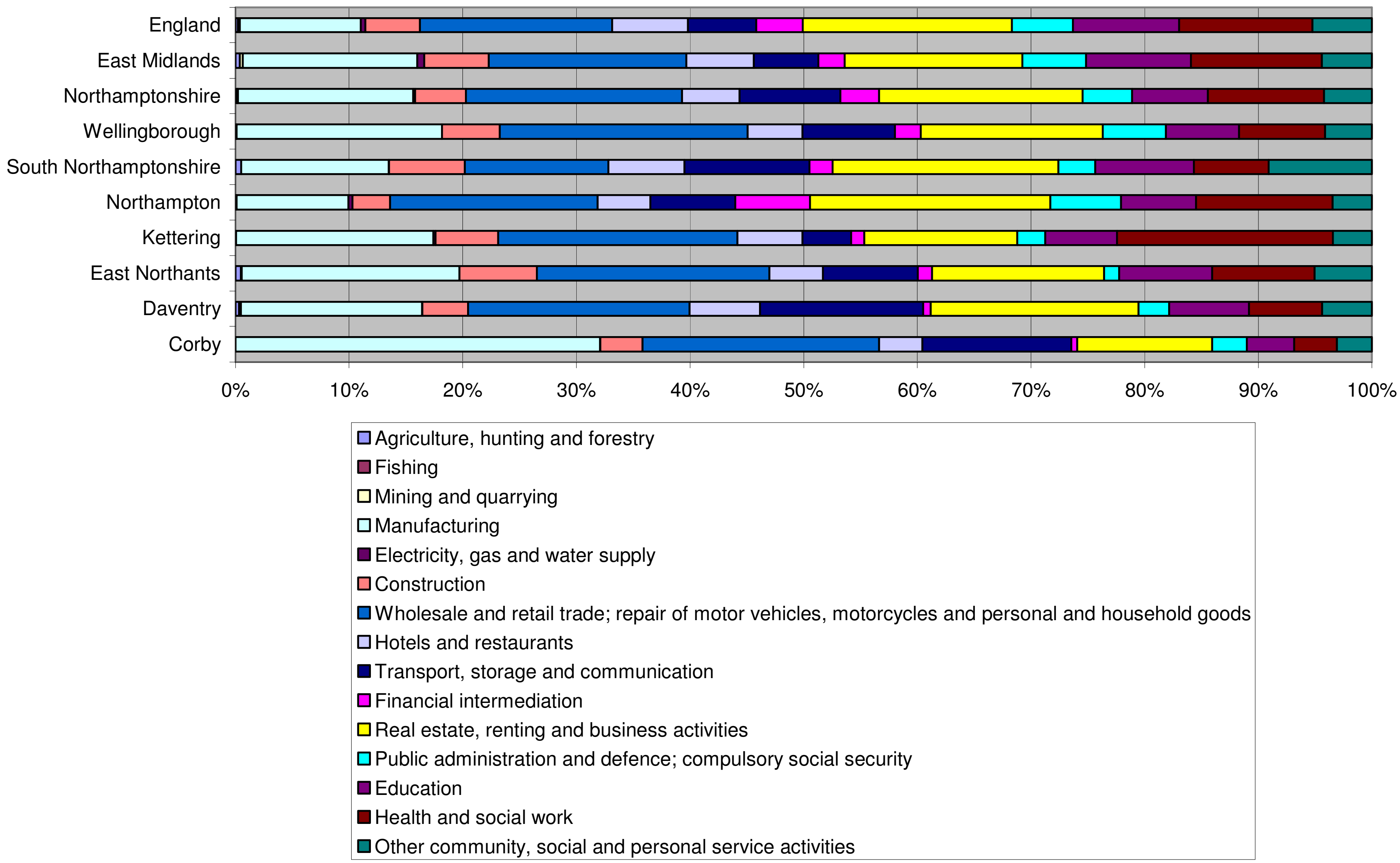
Financial and Business Services

3.12 This sector includes both financial intermediation and the real estate, renting and business activities sectors (see Figure 3.1). The figure illustrates that there are some significant differences between the proportions of employment within these sectors within each local authority. As with manufacturing, the major differences are between Northampton and Corby. Whilst Corby has around 12% of its workforce employed in these sectors, Northampton has nearly 30% which, again, highlights the difference in roles played by the two towns. South Northamptonshire also has a relatively high level of employees within these sectors at 22%.

Public Services

3.13 This sector includes the remaining services of public administration, education, health and social work and other community services. Again, there are some relatively wide differences between local authorities with a total of 14% of the workforce employed within these sectors in Corby and around 32% of the workforce employed within these sectors in Kettering. The remaining districts/ boroughs authorities have between 20% and 30% of the workforce employed within these sectors.

Figure 3.1 - Structure of the economy of each LA in Northamptonshire in 2007



Employment Growth by Sector

3.14 Figure 3.2 illustrates the total employment growth in the manufacturing sector within each district / borough between 1998 and 2007. Manufacturing employment has been indexed to 100 as of 1998.

3.15 The figure illustrates that Wellingborough has seen the most severe downturn in manufacturing during the period 1998-2007, with nearly half of all jobs lost in this sector. This goes some way to explaining why Wellingborough has seen an overall decline in total employment between 1998 and 2007.

3.16 All other local authorities lost jobs within the manufacturing sector at a similar rate with the exception of Daventry, which actually gained manufacturing jobs until 2004 and then experienced a small decline, and East Northamptonshire, which saw a decline up to 2001 where the proportion of employment within the sector then levelled out.

Figure 3.2 – Employment Growth in Manufacturing 1998-2007

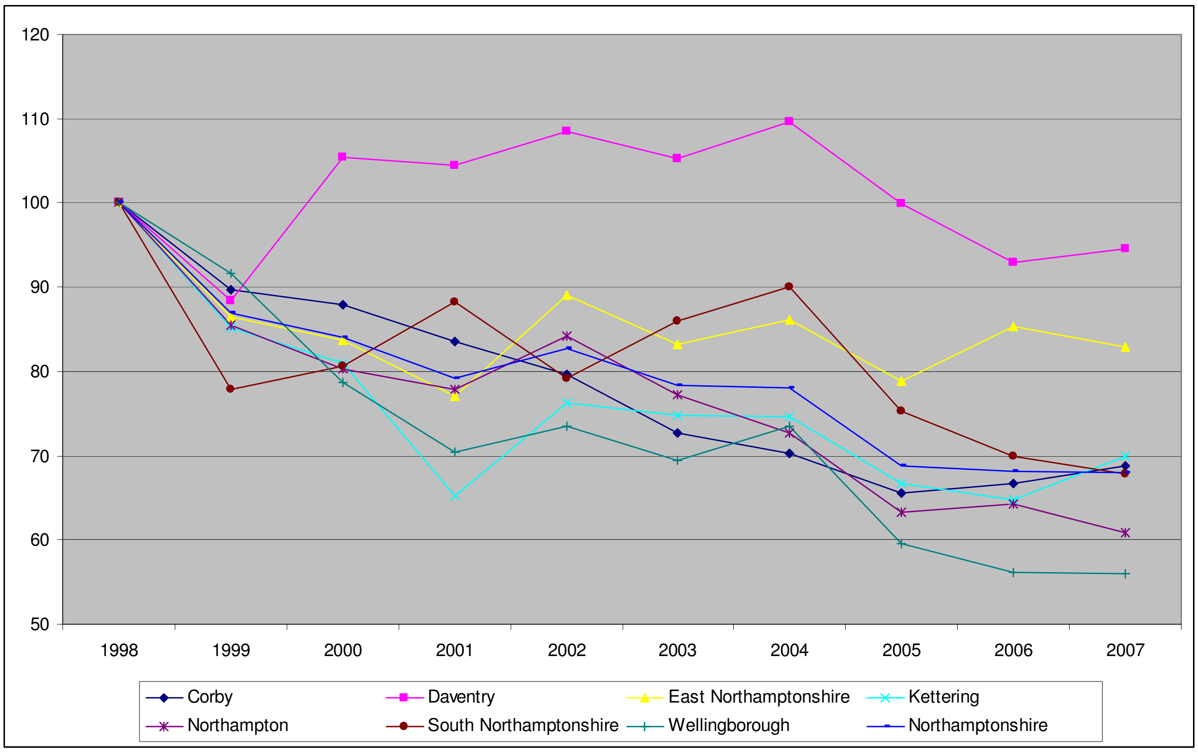
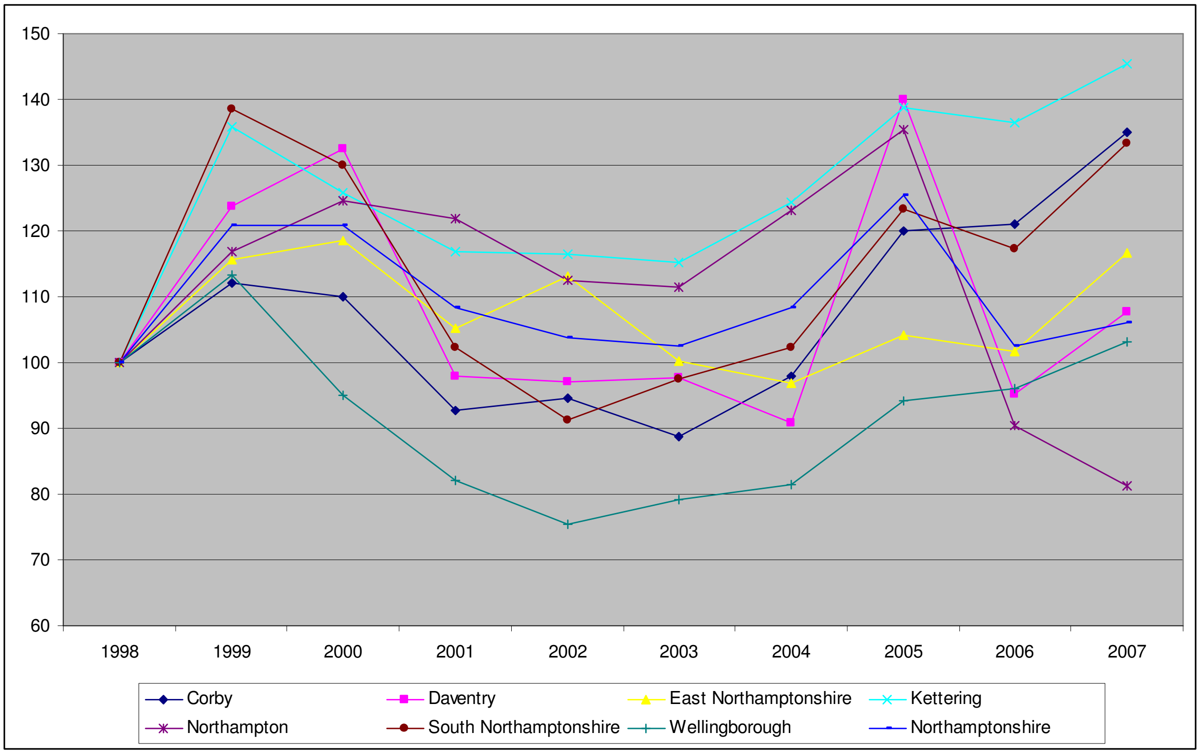
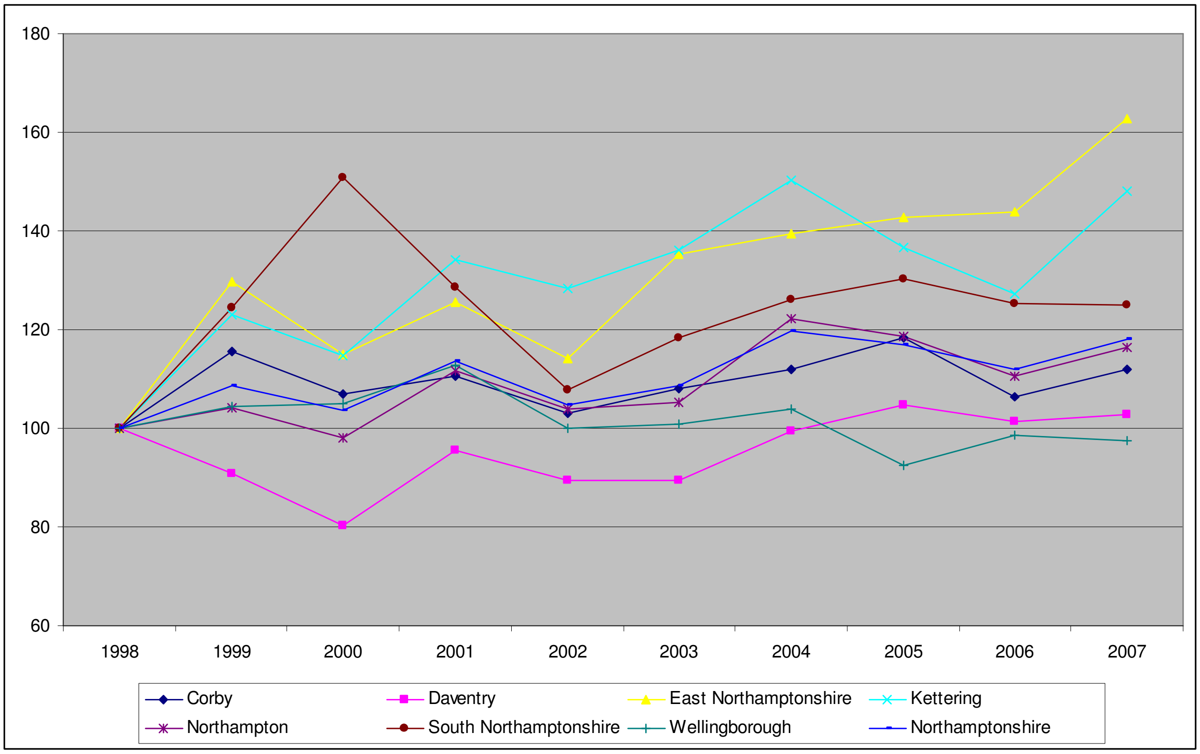


Figure 3.3 – Employment Growth in Construction 1998-2007



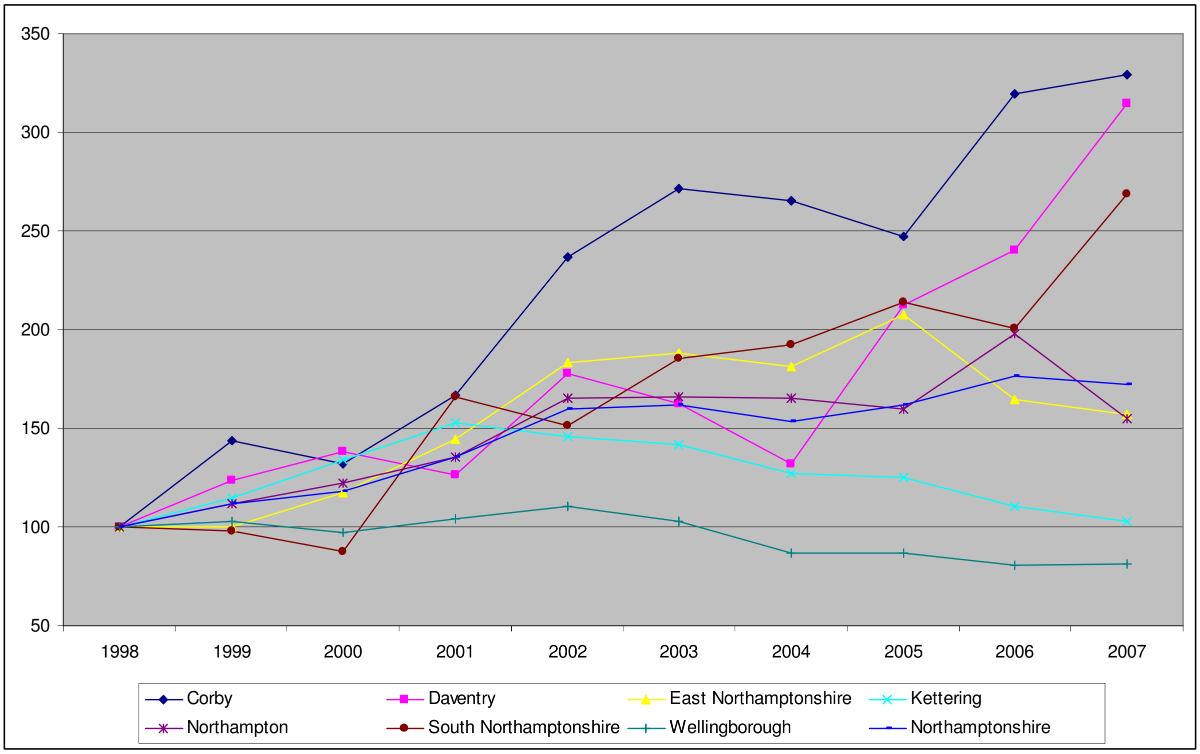
3.17 Figure 3.3 illustrates the total employment growth in the construction sector between 1998 and 2007. The figure illustrates that most authorities experienced a short period of growth within this sector before seeing a decline to 2002/03 and then a further period of growth. This reflects the cyclical nature of the property market.

Figure 3.4 – Employment Growth in Wholesale and Retail 1998-2007



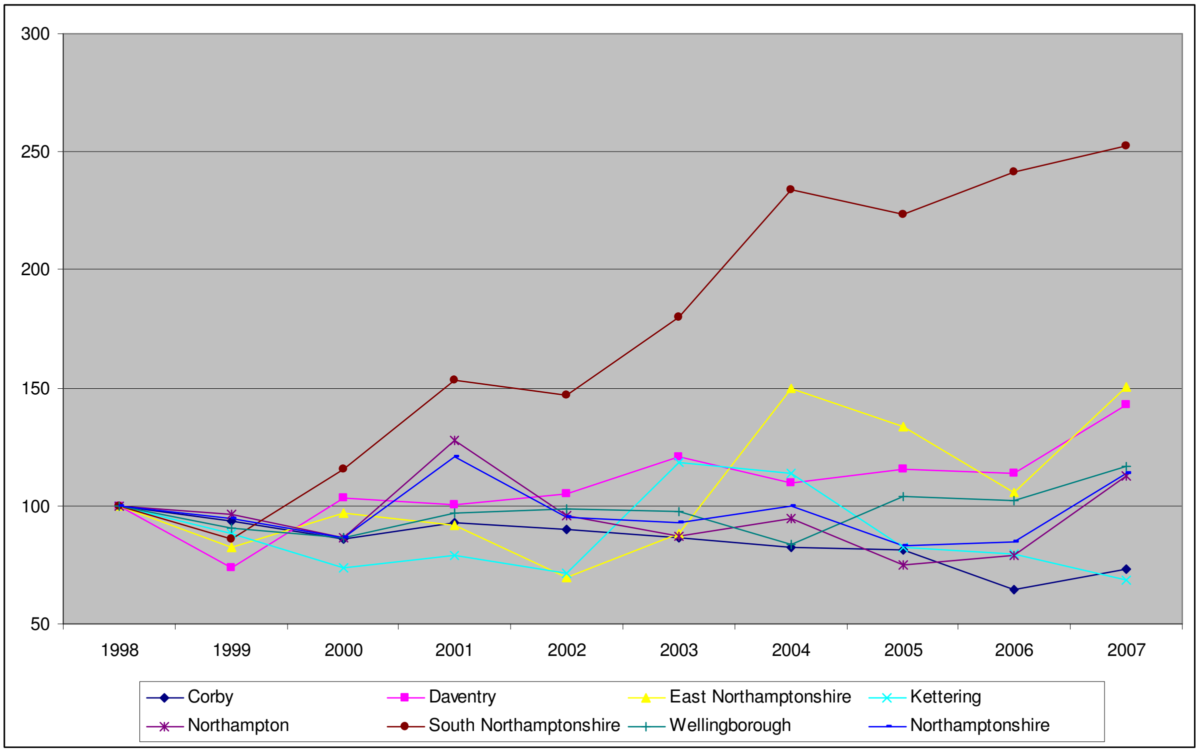
3.18 Figure 3.4 illustrates the total employment growth in the wholesale and retail sector between 1998 and 2007. The figure shows that authorities have seen varying levels of growth in this sector, with Daventry and Wellingborough experiencing roughly no growth between 1998 and 2007 and Kettering and East Northamptonshire seeing growth of 45 and 60% respectively. This is probably a result of the improvements to the A14 which has allowed these authorities to become important locations for distribution.

Figure 3.5 – Employment Growth in Transport, Storage and Communication 1998-2007



3.19 Figure 3.5 illustrates the total employment growth in the transport, storage and communication sectors between 1998 and 2007. The figure shows that Wellingborough was the only authority to experience a decline in the number of people employment in this sector, with around 20% of all jobs lost. Kettering experienced a small amount of growth before losing jobs from around 2001, which has now off-set these original gains. However, Corby, Daventry and South Northamptonshire have all seen dramatic gains within this sector of over 100% growth.

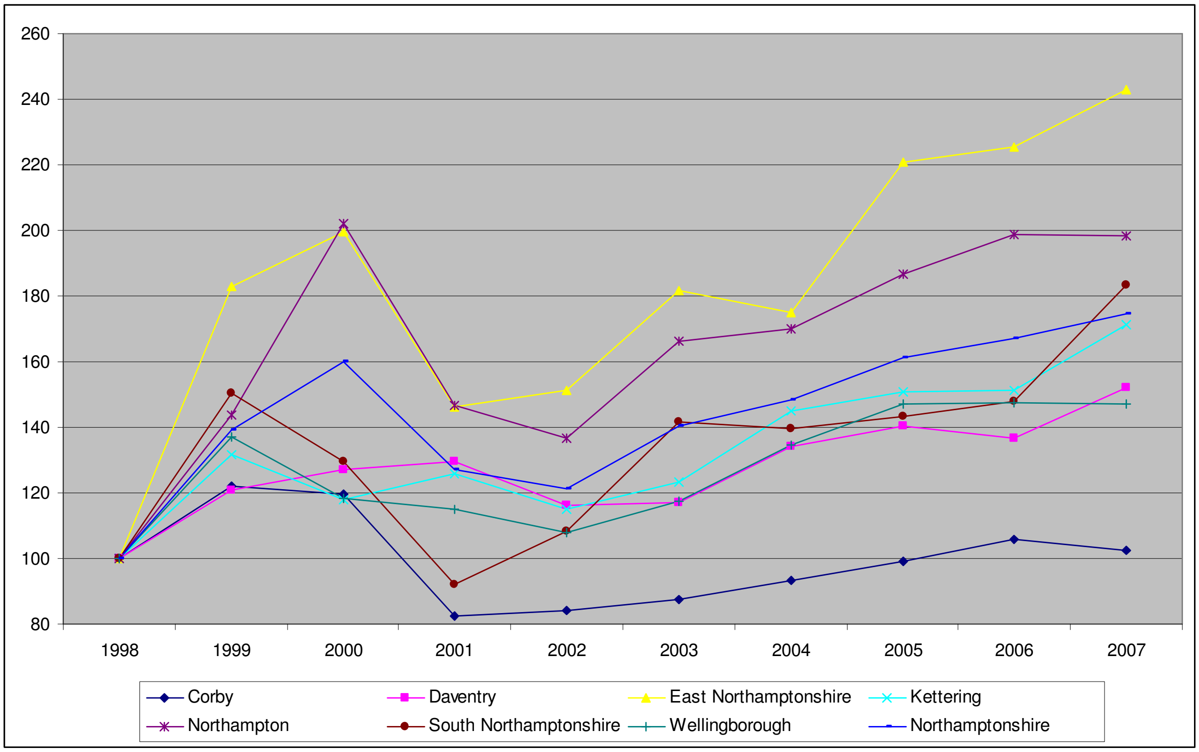
Figure 3.6 – Employment Growth in Financial Intermediation 1998-2007



3.20 Figure 3.6 illustrates the total employment growth within the financial intermediation sector between 1998 and 2007. It shows that both Corby and Kettering experienced a decline in employment within this sector, whilst Daventry, East Northamptonshire, Wellingborough and Northampton experienced growth of up to 50%.

3.21 South Northamptonshire experienced growth significantly above the other six authorities within this sector, although it did start at a very low base in 1998.

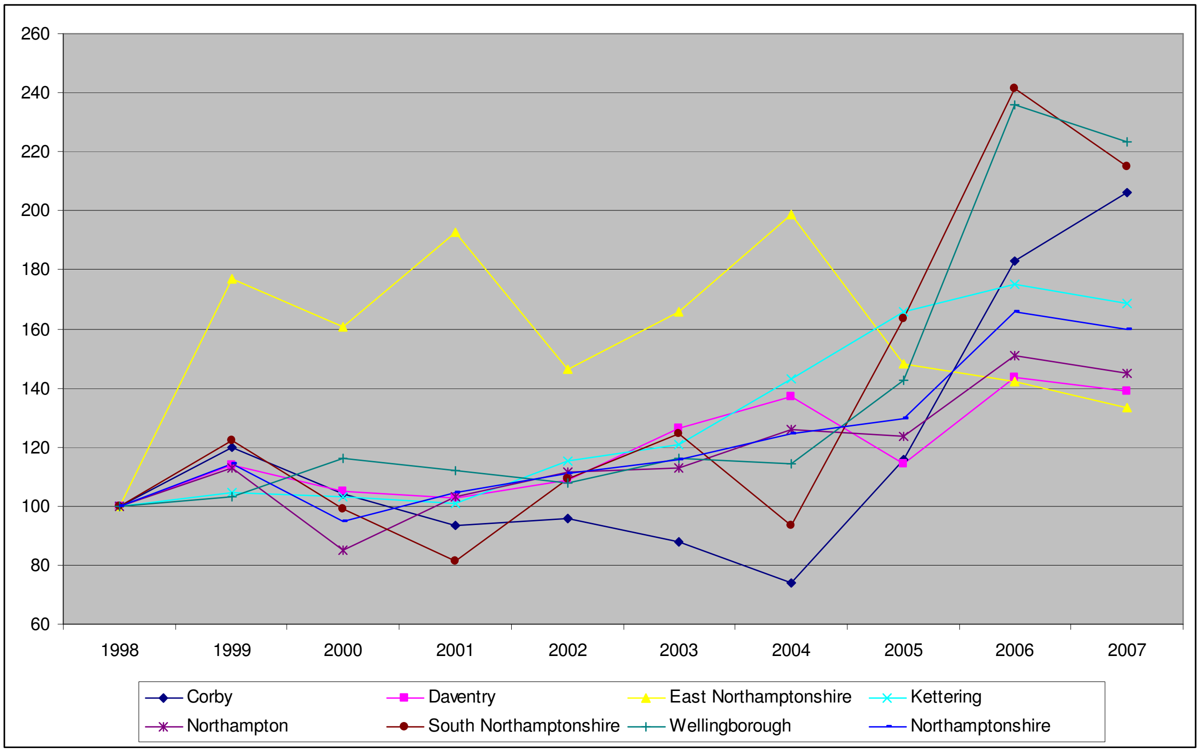
Figure 3.7 – Employment Growth in Real Estate, Renting and Business Activities 1998-2007



3.22 Figure 3.7 illustrates the total employment growth within the real estate, renting and business activities sector between 1998 and 2007. It shows that all authorities experienced some growth within this period, although total growth in Corby was negligible. East Northamptonshire experienced the greatest growth within this period, although it did start from a very low base. Northampton also experienced significant growth within this sector.

3.23 With the exception of Corby, all local authorities within Northamptonshire experienced employment growth of 50% or more within this sector between 1998 and 2007.

Figure 3.8 – Employment Growth in Public Administration and Defence 1998-2007



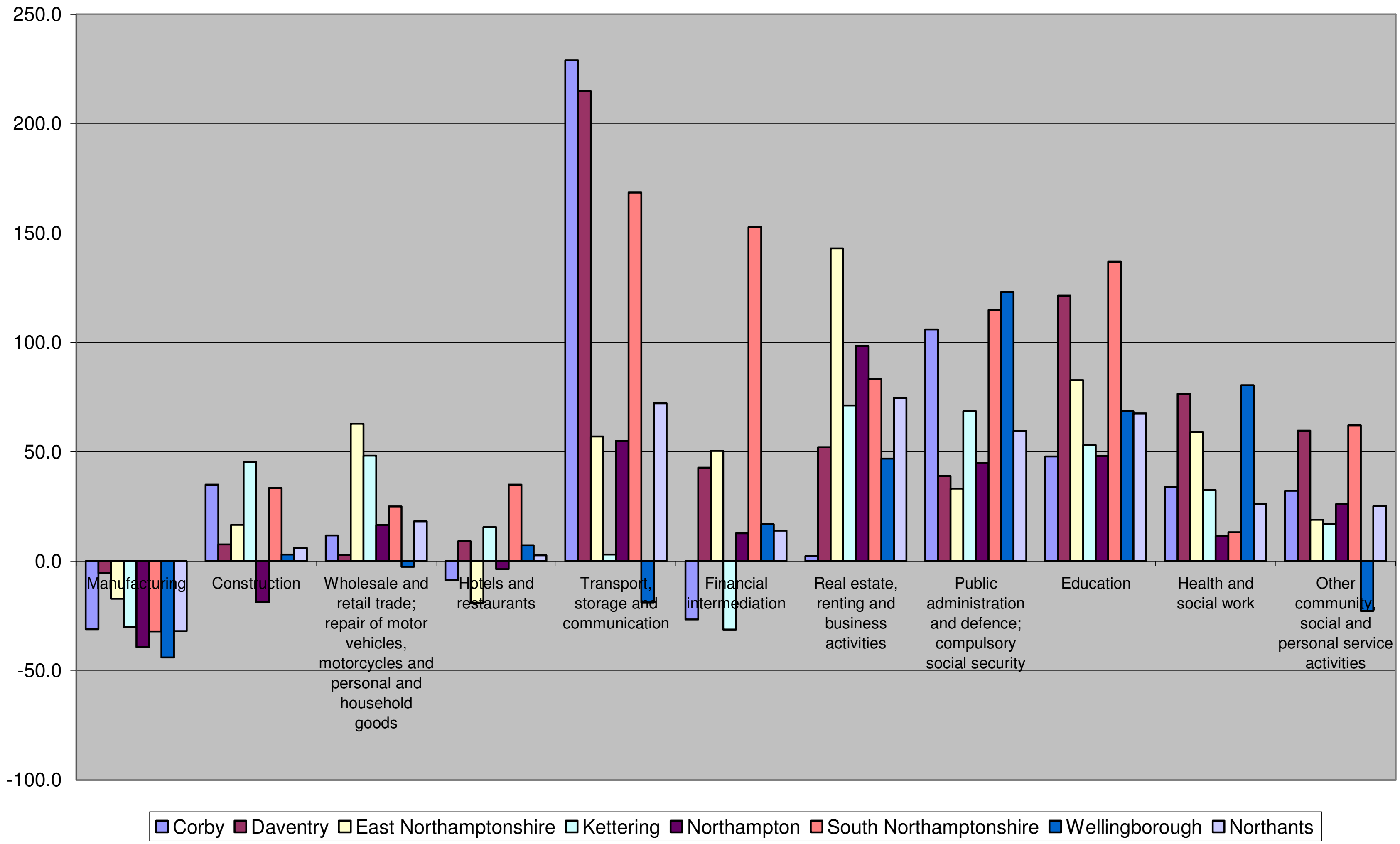
3.24 Figure 3.8 illustrates the total employment growth within the public administration and defence sector between 1998 and 2007. It shows that all authorities experienced some growth within this period. East Northamptonshire experienced the smallest level of growth within this period (at around 35%). Wellingborough saw the greatest level of growth, at 125% in this period.

3.25 Figure 3.9 illustrates the total level of growth for each sector and for each local authority between 1998 and 2007.

3.26 The figure, which essentially summarises the discussions of growth by sector above, illustrates that the transport storage and communication sector has seen the largest growth within Northamptonshire alongside the real estate, renting and business activities sector. As discussed above, each authority has seen differing levels of growth.

3.27 All public sector work, including public administration, education, health and social work and other community services has seen relatively strong growth in most local authorities.

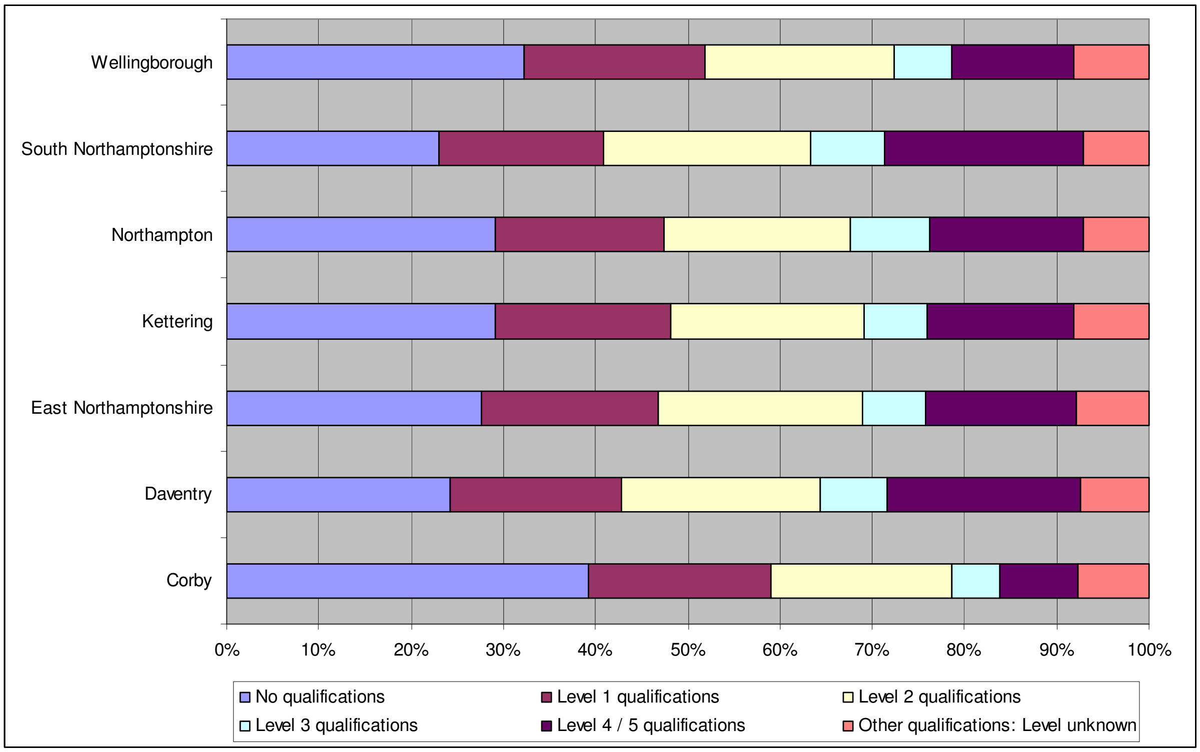
Figure 3.3.9 - Total growth per sector 1998-2007 by Local Authority.



Skills

3.28 Figure 3.10 illustrates the proportion of the population that have achieved a particular level of qualification within the seven authorities in Northamptonshire. The figure illustrates that Corby has a significant population with no qualifications (nearly 40%), whilst South Northamptonshire has just 25% with no qualifications. This is likely to have significant implications for attracting particular industries that require a certain level of skills.

Figure 3.10 - Qualifications and Skills – 2001 Census



Travel to Work Analysis

3.29 Labour Force Survey data indicate that of those Northamptonshire residents who are employed, 82% work within the county. Of those residents who commute outside the county for work, most travel to the local authorities of Milton Keynes, Cherwell, Huntington and Bedford, and a smaller percentage head north to Harborough.

3.30 It is important to highlight that travel to work data is somewhat dated (2001) although it does provide a useful basis for assessing general commuting patterns in the county.

3.31 Table 3.2 demonstrates the origin of those commuting into authorities within Northamptonshire whilst Table 3.3 highlights the destinations of those commuting out of the county. Table 3.4 describes the net commuting balance for each local authority area.

3.32 The key messages from analysis of this data are as follows:

- All local authorities within Northamptonshire experience net out-commuting apart from Northampton and Corby, which are net-importers of labour.
- Corby and Northampton also retain the biggest proportions of their respective populations of all authorities in Northamptonshire (i.e. are the most self-contained).

- South Northamptonshire and East Northamptonshire have the largest net out-commuting flows, largely due to the lack of major employment centres in these districts as well as their proximity to other larger centres outside of both authorities.
- South Northamptonshire has the largest proportion of out-commuting to authorities outside of the county, with the most significant flows to Cherwell and Milton Keynes.
- The greatest flows of out-commuting from Wellingborough are to Northampton rather than Kettering and Corby.
- Out-bound flows of commuters from Kettering are relatively evenly split between Northampton and Corby

3.33 Analysis of ward level commuting flows show that there are clear links between Northampton and its rural hinterland, both from Daventry and South Northamptonshire. As identified in the analysis of flows between authorities above, commuting flows from Wellingborough are clearly directed towards Northampton and not towards Kettering and Corby.

3.34 Furthermore, it appears that flows from the southern section of East Northamptonshire are largely directed towards Wellingborough and Northampton, and not towards Kettering and Corby (which is confirmed by Table 3.3).

3.35 The analysis also indicates that the smaller towns towards the south west of the county are largely associated with larger employment centres outside of the county, such as Banbury and Milton Keynes, and that the rural areas of East Northamptonshire are associated with Peterborough.

3.36 In summary, available information on local commuting flows indicate that there are two clear distinct labour markets within the country itself, one focused on Northampton and its rural hinterlands and one focused on Corby and Kettering. It appears that Wellingborough falls somewhere between the two key labour markets and indeed, demonstrates significant linkages with Northampton. Similarly, Rushden and Raunds also have important links to Northampton.

3.37 Many rural areas located on the edges of the county form part of smaller local labour markets, some of which extent beyond the Northamptonshire boundary.

Table 3.2 – Inbound commuting to Northamptonshire

To	Corby		Daventry		East Northamptonshire		Kettering		Northampton		South Northamptonshire		Wellingborough	
From	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Corby	19546	*65.8*	144	*0.5*	483	*1.8*	1922	*5.6*	865	*0.8*	103	*0.4*	344	*1.0*
Daventry	180	*0.6*	19325	*60.7*	120	*0.5*	438	*1.3*	6922	*6.1*	1356	*4.7*	512	*1.5*
East Northamptonshire	1264	*4.3*	348	*1.1*	18486	*70.2*	2047	*6.0*	3026	*2.7*	165	*0.6*	4676	*14.0*
Kettering	4148	*14.0*	599	*1.9*	1395	*5.3*	24475	*71.6*	3489	*3.1*	204	*0.7*	2611	*7.8*
Northampton	486	*1.6*	3128	*9.8*	608	*2.3*	1037	*3.0*	74898	*66.4*	2676	*9.3*	2532	*7.6*
South Northamptonshire	75	*0.3*	1025	*3.2*	96	*0.4*	130	*0.4*	6288	*5.6*	17899	*62.5*	377	*1.1*
Wellingborough	416	*1.4*	449	*1.4*	2201	*8.4*	1823	*5.3*	6094	*5.4*	342	*1.2*	19878	*59.4*
Other	3599	*12.1*	6799	*21.4*	2946	*11.2*	2290	*6.7*	11155	*9.9*	5881	*20.5*	2516	*7.5*
Total	**29714**	***100.0***	**31817**	***100.0***	**26335**	***100.0***	**34162**	***100.0***	**112737**	***100.0***	**28626**	***100.0***	**33446**	***100.0***

Table 3.3 – Outbound commuting from Northamptonshire

From	Corby		Daventry		East Northamptonshire		Kettering		Northampton		South Northamptonshire		Wellingborough	
To	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Corby	19546	*78.4*	180	*0.5*	1264	*3.3*	4148	*9.9*	486	*0.5*	75	*0.2*	416	*1.2*
Daventry	144	*0.6*	19325	*52.0*	348	*0.9*	599	*1.4*	3128	*3.2*	1025	*2.4*	449	*1.3*
East Northamptonshire	483	*1.9*	120	*0.3*	18486	*47.7*	1395	*3.3*	608	*0.6*	96	*0.2*	2201	*6.2*
Kettering	1922	*7.7*	438	*1.2*	2047	*5.3*	24475	*58.5*	1037	*1.1*	130	*0.3*	1823	*5.1*
Northampton	865	*3.5*	6922	*18.6*	3026	*7.8*	3489	*8.3*	74898	*77.2*	6288	*14.9*	6094	*17.1*
South Northamptonshire	103	*0.4*	1356	*3.6*	165	*0.4*	204	*0.5*	2676	*2.8*	17899	*42.3*	342	*1.0*
Wellingborough	344	*1.4*	512	*1.4*	4676	*12.1*	2611	*6.2*	2532	*2.6*	377	*0.9*	19878	*55.9*
Other	1537	*6.2*	8316	*22.4*	8718	*22.5*	4950	*11.8*	11681	*12.0*	16441	*38.8*	4371	*12.3*
Total	**24944**	***100.0***	**37169**	***100.0***	**38730**	***100.0***	**41871**	***100.0***	**97046**	***100.0***	**42331**	***100.0***	**35574**	***100.0***

Table 3.4 – Net Commuting Balance – Northamptonshire

To	Corby	Daventry	East Northamptonshire	Kettering	Northampton	South Northamptonshire	Wellingborough
From							
Corby	0	-36	-781	-2226	379	28	-72
Daventry	36	0	-228	-161	3794	331	63
East Northamptonshire	781	228	0	652	2418	69	2475
Kettering	2226	161	-652	0	2452	74	788
Northampton	-379	-3794	-2418	-2452	0	-3612	-3562
South Northamptonshire	-28	-331	-69	-74	3612	0	35
Wellingborough	72	-63	-2475	-788	3562	-35	0
Other	2062	-1517	-5772	-2660	-526	-10560	-1855
Total	**4770**	**-5352**	**-12395**	**-7709**	**15691**	**-13705**	**-2128**

ONS Travel to Work Areas

3.38 Travel-to-Work Areas (TTWAs) are designated by the Office for National Statistics (ONS) as a statistical geography. TTWAs are the output from consistently applying one approach to defining sub-regional labour market areas. The geography of labour markets which TTWAs represent is largely defined by patterns of commuting.

3.39 The fundamental criterion is that, of the resident economically active population, at least 75 per cent actually work in the area, and also, that of everyone working in the area, at least 75 per cent actually live in the area.

3.40 The 243 current TTWAs were defined in 2007 using 2001 Census information on home and work addresses, and are based on Lower Layer Super Output areas in England. The analysis of travel to work data above also uses the same commuting dataset and so should support the initial analysis of labour markets within Northamptonshire.

3.41 The following key ONS TTWAs are identified in the county:

- Northampton and Wellingborough (entirely within Northamptonshire)
- Kettering and Corby (entirely within Northamptonshire)
- Banbury (includes a small section of the southwest of the country, which includes Brackley as well as other rural areas)
- Milton Keynes and Aylesbury – includes a small corner directly south of Northampton, immediately south east of Towcester

- Rugby – Includes a portion of the north east of the county between the M45 and A14 junction on the M1 – appears to include Daventry rail terminal
- Peterborough – Includes Oundle and small parts of the north east rural areas of the county

3.42 As expected, the TTWAs defined by the ONS do support the analysis of commuting patterns identified above – that there are two major travel to work areas centred around Northampton and Corby, with other TTWAs taking in the rural fringes. The ONS analysis also confirms that Wellingborough, at least in part, feeds into the Northampton labour market.

3.43 Table 3.5 demonstrates the total resident population within each TTWA that falls within Northamptonshire (i.e. - only the Northamptonshire section of each TTWA is included). The table highlights that the Northampton TTWA is by far largest with 65% of the residential population of the county residing within this area, which reflects Northampton's importance as a major economic centre. By contrast, the Kettering and Corby TTWA include just 24% of the population of the county. South western areas of the county form part of the Banbury TTWA and incorporate nearly 6% of Northamptonshire's population.

Table 3.5 – Population of Travel to Work Areas (as defined by ONS) within Northamptonshire

TTW Area	Population	%
Northampton and Wellingborough	410,963	65.3
Kettering and Corby	151,375	24.0
Rugby	7,405	1.2
Banbury	36,275	5.8
Milton Keynes	9,168	1.5
Peterborough	14,496	2.3
Total	629,682	100.0

Key Messages

3.44 The analysis of travel to work data indicates that Northamptonshire can be divided into two clear TTW areas with one based around Northampton and its rural hinterland and one based around Corby and Kettering.

3.45 Wellingborough has a significant functional link with Northampton which should be taken into consideration when planning for the provision of employment land in the county.

3.46 The rural areas within the peripheral parts of the county are related to TTWAs centred on towns outside of Northamptonshire, such as Peterborough, Milton Keynes, Rugby and Banbury. With the exception of Banbury, these rural areas accommodate just 5% of the county's population and so could be grouped in with either the Northampton or Corby and Kettering TTWA.

3.47 The main benefit of defining functional labour market areas is to facilitate an approach to planning for future employment land supply that is meaningful in economic and market terms. As highlighted in Section 2, this approach is strongly endorsed by planning policy and relevant government guidance (e.g. ODPM / CLG Guidance Note on Employment Land Reviews).

3.48 These functional labour market areas should be taken into consideration when planning for employment provision in the county. In allowing for natural economic linkages between different parts of the county to flourish, it will be especially important to ensure that employment land provision figures incorporate a reasonable degree of flexibility in terms of distribution between districts. Maintaining a strategic, sub-regional approach to the provision of employment land will be central to achieving this.

3.49 Whilst in an ideal world, it may be appropriate to define future employment land provision figures based on bespoke labour market areas or TTWAs, this is likely to lead to difficulties in implementing planning policies and associated development allocations at the district level. Consequently, we propose that the sub-areas of North and West Northamptonshire form the main geographical units on which to planning for employment land provision in the county. This brings with it the following key benefits

- The sub-areas generally reflect the labour market areas focused on Northampton and Corby / Kettering and therefore have a reasonable degree of functional meaning.
- It will provide a strategic response to meeting future business needs and allow for sufficient flexibility in the distribution of employment land supply between districts.
- The strategic sub-areas allow for the aggregation of district level information.

3.50 Within this structure, as far as possible, sites must seek to support activities for employees to use sustainable travel modes between their home and workplace. This will include high quality public transport corridors and maximising the opportunity to use means of transport alternative to the car.

4. Existing Demand Forecasts & Projections

Introduction

4.1 The brief for this study highlighted that significant work has already been undertaken in respect of estimating future employment needs in Northamptonshire. Consequently, before establishing a range of specific employment growth scenarios for the SELA, it is important to briefly review existing forecasts and projections that have been prepared for the County and its sub-areas and the methodologies which underlie these. These include:

- MKSM jobs provision targets;
- CoPELA studies;
- SNEAP;
- Emda Scenario Impact Model.

Milton Keynes South Midlands Growth Area Targets

4.2 The MKSM employment monitoring figures are set out in the MKSM Sub Regional Strategy and already have been adopted the North Northamptonshire Core Spatial Strategy. The forecasts largely were developed to help establish the economic growth aspirations for the county which would be commensurate with planned housing growth targets.

4.3 The study which preceded the MKSM strategy produced three Economic Growth Scenarios, using the model TEMPRO 4.1 and the preferred scenario that became called the 'TEMPRO Plus' variant. In summary, this study added three assumptions to the TEMPRO baseline scenario including:

- An assumption that the area as a whole can achieve above trend growth;
- A shift in activity towards higher value knowledge based sectors of the economy; and,
- Effective regeneration policies that produce a greater than proportionate share of growth for the priority areas (such as Corby).

4.4 The MKSM figures and assumptions for the baseline and preferred scenario are summarised below in Table 4.1.

Table 4.1 – MKSM Employment Forecasts & Assumptions

	MKSM Trend Based Scenario	*MKSM Higher Growth Scenario*
Purpose of Study	• Assess potential for growth in MKSM area. • Forecast scenarios developed to help inform the challenges that Northamptonshire needs to address in order to meet MKSM housing targets.	
Technique	TEMPRO- Trend based.	TEMPRO + Forecasting Assumptions.
Forecasting Assumptions	• TEMPRO Planning dataset, proposed for multimodal transport studies based on population, households, workforce and employment projections. • High Activity rates (in context of ageing population).	• Study area can achieve above trend growth • Shift towards higher value knowledge based sectors of the economy (Business services sector growth rate + 0.5% TEMPRO rate 2011/21 and +1% 2021/31.) • Effective regeneration policies.
Forecasting Results, Employment Change 2001/31 (2001/21 assumed 60% of 2001-2031 total)		
Northamptonshire	107,500 (64,500)	141,000 (84,600)
West Northamptonshire	84,400 (50,000)	62,000 (37,200)
North Northamptonshire	24,100 (14,500)	79,000 (47,400)

4.5 There are significant differences between the baseline trend projection and the higher growth scenario. This is not only in terms of the absolute level for Northamptonshire (141,000 jobs increased over 2001/31 compared to 107,500 in the baseline projection) but also in terms of the spatial distribution of growth. In effect, the preferred projections dampen the emphasis of trend growth in the West to significantly enhanced growth in the North.

4.6 The underlying rationale for the preferred projection is tied to the assumption that population growth, achieved through large scale housing development, would be effective in altering historic market trends in the North.

CoPELA Studies

4.7 The CoPELA studies set out the employment scenarios derived from the projections in the Milton Keynes and South Midlands study as follows:

- Assume employment growth reflects the higher growth option of the MKSM study.
- Produce two alternative spatial distributions of this growth based on:
    - Allocating the ‘supergrowth’ according to existing sectoral strengths (Industrial Structure).
    - Allocating growth in accordance with the spatial distribution set out in the MKSM study (Spatial Distribution).

4.8 The term 'supergrowth' relates to the difference between the Cambridge Econometrics 'trend scenario' and the MKSM target 'the planning scenario'. The key difference between the two scenarios is the distribution of growth between districts:

- Scenario A is market-led. It aims to model the easier (or less difficult) way to achieve the supergrowth targeted by the MKSM strategy. This scenario goes with the grain of the market, concentrating growth in those places which already have a favourable economic structure, indicating that they are attractive to dynamic, growing economic activities.
- Scenario B is policy-led. It starts from a target distribution of total employment between districts which reflects MKSM policy priorities, aiming to direct employment growth to those areas which need it most – whether to combat current deprivation, to cater for future population growth, or both.

4.9 The scenarios and their results are summarised in Table 4.2

Table 4.2 - CoPELA Scenario A & B Projections 2001/21

	Scenario A: Market Led	Scenario B: Policy Led
Northamptonshire	84,600	84,600
West Northamptonshire	65,743	37,200
North Northamptonshire	27,857	47,400

4.10 Table 4.2 highlights the differences between the Market led Scenario A and Policy led Scenario B in terms of the outcomes for West and North Northamptonshire. Although not displayed, the former results in strong growth within those sectors expected to grow strongly according to their existing geographical distribution. The latter forecasts significant diversification and growth in areas that do not currently have a favourable sectoral mix.

B-Use Implications

4.11 The CoPELA studies provided a breakdown of the total employment forecasts into B-use jobs. These are provided in Table 4.3 for the county and the two sub-areas.

Table 4.3 – B-Use Forecasts from CoPELA following MKSM (Scenario B)

CoPELA 06 Forecasts	2001	2021	Change
North Northamptonshire			
Industrial	37,786	41,321	3,534
Warehousing	18,344	27,521	9,177
Off ice	14,698	24,948	10,250
B Space Jobs	70,829	93,790	22,961
Non B Jobs	61,426	85,865	24,439
All Jobs	132,255	179,655	47,400
% of B Space Jobs	*53.6%*	*52.2%*	*48.4%*
West Northamptonshire			
Industrial	37,129	33,317	-3,812
Warehousing	20,126	24,741	4,615
Off ice	42,014	60,282	18,267
B Space Jobs	99,269	118,340	19,071
Non B Jobs	104,876	123,005	18,129
All Jobs	204,145	241,345	37,200
% of B Space Jobs	48.6%	49.0%	51.3%
Northamptonshire			
Industrial	74,915	74,638	-277
Warehousing	38,470	52,262	13,792
Off ice	56,712	85,230	28,517
B Space Jobs	170,098	212,130	42,033
Non B Jobs	166,302	208,870	42,567
All Jobs	336,400	421,000	84,600
% of B Space Jobs	50.6%	50.4%	49.7%

4.12 Overall B-use jobs are projected to increase from 170,098 to 212,130 by 2021, which accounts for around 50% of the total employment growth. The estimated growth in B-use jobs is slightly higher in North Northamptonshire at 22,961 compared to 19,071 in the West.

Strategic Northamptonshire Economic Action Plan (SNEAP)

4.13 The SNEAP was developed to deliver the economic vision for the county, as set out in the planning frameworks for North Northamptonshire and West Northamptonshire. The key challenge for the SNEAP – an integrated response for the county as a whole – results from the differences between the visions, and the current performance and future prospects for North and West Northamptonshire.

4.14 The study generated econometric forecasts (using Cambridge Econometrics' Local Economy Forecasting Model (LEFM)) for North and West Northamptonshire. These are set against those trajectories proposed for the two areas in the existing or developing planning frameworks. The forecasts using the Trajectories and LEFM model are shown in Table 4.4.

Table 4.4 – Trajectories and LEFM Forecasts, 2001/21

	Trajectories		LEFM Forecasts	
	North Northamptonshire	West Northamptonshire	North Northamptonshire	West Northamptonshire
Jobs Growth	47,400	37,200	28,500	53,000
Jobs Growth p.a.	2,370	1,860	1,425	2,650

4.15 The trajectories for North Northamptonshire and West Northamptonshire are in line with the MKSM targets. However, these differ significantly to the LEFM forecasts prepared by Cambridge Econometrics which are trend-based projections.

4.16 The study establishes a preferred economic scenario to inform the SNEAP, which is a hybrid of achieving the trajectory-led net jobs in the North (47,400) with the LEFM / trend based projections in the West (53,000).

4.17 The SNEAP highlights the type of aspirational growth assumptions that underpin the job growth projection for North Northamptonshire. These assumptions are considered in more detail later in this report.

B-Use Implications

4.18 The SNEAP also produced B-use employment forecasts up to 2026, which are provided in Table 4.5.

Table 4.5 – SNEAP Preferred Economic Forecast, B-use Employment[7]

	2001	2021	2026	Change (2001-2026)
North Northamptonshire				
Industrial	36,585	37,843	39,003	2,418
Warehousing	19,755	26,582	28,441	8,687
Off ice	13,344	28,333	35,028	21,684
B Space Jobs	69,684	92,758	102,473	32,788
Non B Jobs	63,744	88,041	95,073	31,330
All Jobs	133,428	180,799	197,546	64,118
% of B Space Jobs	*52.2*	*51.3*	*51.9*	*51.1*
West Northamptonshire				
Industrial	35,591	32,617	32,661	-2,930
Warehousing	21,440	29,381	31,165	9,726
Off ice	34,514	53,514	60,040	25,526
B Space Jobs	91,545	115,512	123,867	32,322
Non B Jobs	102,229	131,279	138,026	35,797
All Jobs	193,774	246,791	261,893	68,119
% of B Space Jobs	*47.2*	*46.8*	*47.3*	*47 .5*
Northamptonshire				
Industrial	72,176	70,460	71,664	-512
Warehousing	41,195	55,963	59,607	18,412
Off ice	47,858	81,848	95,068	47,210
B Space Jobs	161,229	208,270	226,339	65,110
Non B Jobs	165,973	219,320	233,099	67,126
All Jobs	327,202	427,590	459,439	132,237
% of B Space Jobs	*49.3*	*48.7*	*49.26*	*49.24*

4.19 Overall, the total number of B-use jobs forecasted, despite the much higher growth envisaged for the West, is not significantly different to CoPELA / MKSM (approximately 5,000 jobs higher). This largely is because non B-use jobs forecasted in SNEAP account for a larger proportion of total jobs compared to CoPELA / MKSM.

[7] SNEAP states that the methodology used for the allocation of employment to B Use Class is identical to that used in previous work by Northamptonshire partners and set out in CoPELA 2006. However it is apparent that it allocated Publishing, SIC 22.1, to Industrial space rather than Office, as was the case in CoPELA.

EMDA Scenario Impact Model[8]

4.20 The East Midlands Development Agency (EMDA) Scenario Impact Model provides forecasts at the county level for Northamptonshire.

4.21 The model is based on Experian Business Strategies' economic data for the East Midlands, which are consistent with Experian's macroeconomic and regional forecasts produced in their Autumn 2008 Regional Planning Service. The data consists of historical employment, output, productivity, population estimates and projections, and other labour market information. These are provided for the East Midlands, Sub-Regional Strategic Partnerships (SSPs) and local authority districts (LADs) within the region.

4.22 The baseline scenario represents a combination of historical trends and expected changes in macroeconomic conditions in the UK that are filtered down to the regional level. It is important to highlight that these forecasts do not take into account any RES (or other local) policy interventions apart from an assumption that 50% of the population boost expected as part of the MKSM growth strategy occurs.

4.23 The most up to date results for employment change forecasted for 2001/16 and 2008/16 are set out in Table 4.6. This compares the results for Northamptonshire with other SSPs in the East Midlands.

Table 4.6 – EMDA Employment Projections 2001/16 for all SSPs

	2001	2011	2016	2001/16 Change
Northamptonshire	269.5	283.7	294.4	24.94
Lincolnshire	225.4	254.9	257.1	31.71
Leicestershire	377.3	402.9	403.9	26.64
Welland	125.3	141.7	143.3	18.00
Greater Nottingham	266.8	269.9	277.9	11.12
N Derbyshire	220.6	235.3	242.5	21.84
Derby & Derbyshire	267.2	269.1	270.1	2.95
East Midlands	1,639	1,728	1,758	118.44

4.24 Overall growth forecasted for Northamptonshire is high accounting for 21% of total growth in the East Midlands. However, Lincolnshire and Leicestershire display higher absolute levels of forecast employment growth. It is important to note that some of the Welland employment growth may fall in East Northamptonshire.

4.25 Total employment over 2001/16 is forecast to grow by 24,940 jobs in Northamptonshire. Given that the model does not build in the potential impact of major policy drivers and planned interventions aimed at delivering housing and employment growth, the Emda model implies a significantly lower level of growth compared to adopted planning policy and other existing studies reviewed in this Section.

[8] It has not been possible to translate the EMDA forecasts into B-uses as the SIC codes are insufficiently detailed.

4.26 Table 4.7 sets out the Emda employment forecasts for Northamptonshire districts. It indicates that forecasted employment growth is strongest in Northampton, Daventry and South Northampton, which is in line with the market led projections of LEFM. Growth is forecast to be much lower in North Northamptonshire, particularly in Corby and Wellingborough.

Table 4.7 – Northamptonshire District Change, 2001/16 (Emda Model)

	2001	2011	2016	2001/16
Corby	27,186	28,183	29,762	2576.1
Daventry	28,792	32,612	34,114	5321.9
East Northamptonshire	22,100	25,253	25,495	3395.0
Kettering	30,089	32,487	33,316	3227.7
Northampton	105,399	108,026	112,151	6751.5
South Northampton	24,877	27,934	29,331	4454.5
Wellingborough	31,013	29,224	30,225	-787.2
North Northamptonshire	110,387	115,147	118,799	8,412
West Northamptonshire	159,068	168,571	175,596	16,528

Table 4.8 – EMDA Scenario Impact Model, Forecast Employment Change by Sector 2001/16

	Northamptonshire 01/16	**East Midlands. 01/16**	**Northamptonshire 08/16**	**East Midlands 08/16**
Manufacturing	-15,921	-106,617	-5,613	-29,330
Construction	-5,152	-7,057	-3,112	-25,415
Wholesale & Retail	1,711	11,054	-342	-4,408
Transport & Communications	11,385	27,720	2,940.3	7,07
Financial & Business Services	19,962	110,878	6,761.5	30,377
Public administration education & health	8,057	51,670	3,492.4	9,197
TOTAL	24,940	118,436	7,331	-3,568
Growth Rate per annum	0.59	0.47	0.36	-0.03

4.27 Table 4.8 summarises the forecast growth by sector. Growth projected by the model is driven largely by financial & business services, the public sector and transport & communications.

Summary

4.28 Table 4.9 summarises the key outputs of the existing forecasts and projections that have been provided for Northamptonshire. This demonstrates significant variation in terms of total forecast future employment growth in the county but more especially in terms of the spatial distribution of jobs between North and West Northamptonshire. Of particular significance is the variation between the SNEAP preferred scenario and trend-based results for North Northamptonshire. This highlights the significance of the step change required and need for public sector intervention in the North to achieve the employment growth aspirations established by SNEAP.

Table 4.9 – Existing Forecasts: Summary Table

	Northamptonshire		West Northamptonshire		North Northamptonshire	
	2001/21	2001/31	2001/21	2001/31	2001/21	2001/31
MKSM Preferred Option	84,600	141,000	37,200	62,000	47,400	79,000
MKSM Tempro Baseline	64,500	107,500	50,000	84,400	14,500	24,100
CE: Market Led (CoPELA Scenario A)	84,600		65,743		27,857	
LEFM	81,500		53,000		28,500	
SNEAP Preferred Economic Forecast	100,400	132,237 (up to 2026) 158,684 rolled forward	53,000	68,119 (up to 2026) 81,742 rolled forward	47,400	64,118 (up to 2026) 76,942 rolled forward
EMDA	24,940 (up to 2016) 33,253 rolled forward	49,880 rolled forward	16,528 (up to 2016) 22,037 rolled forward	33,056 rolled forward	8,412 (up to 2016) 11,216 rolled forward	16,824 rolled forward

4.29 Amongst the existing forecasts and projections, estimates of growth in B-use jobs have only been provided by MKSM / CoPELA and the SNEAP preferred economic scenario. These indicate that, using existing definitions of B use employment (translated from SIC codes), B-use jobs in the county account for approximately 50% of all jobs. Tables 4.10 and 4.11 set out the proportions and amount of total jobs assumed to be accommodated in B use class categories.

Table 4.10 – Proportion of Total Employment Change (2001-2021) Provided in B Use categories

	Northamptonshire	West Northamptonshire	North Northamptonshire
MKSM (CoPELA Scenario B)	49.7%	51.3%	48.4%
SNEAP	46.9%	45.2%	48.7%

Table 4.11 – Summary of Existing B-Use Employment Change 2001/21

	Northamptonshire	West Northamptonshire	North Northamptonshire
MKSM (CoPELA Scenario B)	42,033	19,071	22,961
SNEAP	47,041	23,968	23,074

5. Monitoring Growth Performance

Introduction

5.1 Given that the MKSM employment targets have been operating from the base year of 2001, it is important to consider the extent to which actual employment growth has been achieved since then relative to the annualised forecast growth. This represents a critical monitoring exercise which should be regularly updated during the plan period of the two LDFs.

5.2 Using ABI data, this section analyses time-series data to assess total, B-use and non B-use employment change between 2001 and 2007 (the latter date being the latest available). These changes in Northamptonshire are compared to regional and national trends.

5.3 Consideration is also given to change in floorspace completions over recent years using Valuation Office (VO) commercial and industrial floorspace statistics. It is important to highlight that it is difficult to directly compare the VO floorspace data with ABI employment data given the difference in methods used to collect information.

5.4 It is also necessary to highlight that limitations exist when comparing ABI results from recent years to those issued for 2001 and subsequent years. In particular:

- Estimates for 2005 and earlier are on a different basis to those from 2006 onwards, mainly due to a change in the survey reference date. Consequently, NOMIS warns that comparisons over the discontinuity could yield misleading results.
- The 2003 ABI data for aggregate areas is based on 2003 CAS wards which differs from previous years ABI data which was build from 1991 census wards. This may give rise to discontinuities when comparing 2003 data with previous years.
- The 2003 ABI data is based on the Standard Industrial Classification (SIC) 2003 which differs from previous years ABI data. This may give rise to discontinuities.

5.5 Despite potential limitations in comparing ABI data over time for the period before 2006, the ABI provides the most reliable, single source of data to measure general trends and significant changes over time.

2001 Base Year Employment Estimates

5.6 From a technical viewpoint, it should be highlighted that the various forecasting models discussed in Section 4 differ significantly in terms of the assumed level of employment at the base year of 2001. Table 5.1 compares employment estimates for 2001 used by the various forecasting models. These are compared with data provided by the ONS Annual Business Inquiry (ABI) [9].

5.7 Table 5.1 demonstrates the significance of differences in the base year data used for 2001. For Northamptonshire, it can be seen that this varies from 269,455 in the EMDA model to 327,200 used in SNEAP (LEFM). For comparison, ABI estimates 2001 employment to be 290,400 (excluding self-employment).

5.8 As for estimates of total employment at 2001, variations are reflected in the base year data for B-use employment: Table 5.1 shows that this varies from 161,229 to 170,098 with ABI estimates at 145,934.

[9] ABI data is the most commonly used source of local area employment statistics and was used in the MKSM Strategy. Consequently, SELA has used ABI data for purposes of consistency.

Table 5.1 – Comparison of 2001 Base Data by Forecasting Model

	Northamptonshire 2001	West Northamptons hire 2001	North Northamptonsh ire 2001
Total Employment			
ABI Position	290,400	118,400	172,000
MKSM Preferred Scenario	295, 838	166,324	129,514
SNEAP Preferred Scenario (LEFM 2001 Figure)	327,200	193,800	133,400
EMDA Scenario Impact Model	269,455	-	-
B Use Employment			
ABI Position	145,934	83,022	62,912
MKSM Preferred Scenario	170,098	99,269	70,829
SNEAP Preferred Scenario (LEFM 2001 Figure)	161,229	91,545	69,684

Employment Performance 2001/07

5.9 Based on ABI data, the level of employment in 2007 within West Northamptonshire and North Northamptonshire was 188,194 and 124,936 employees respectively. This equates to annual average growth rates of 1.5% and 0.9% per annum between 2001 and 2007.

Table 5.2 - District Level Forecasts against Employment Change 2001/07

	MKSM Forecasts 2001/31	MKSM Forecasts 2001/21	LEFM Forecast 2001/21	MKSM Annual Rate	Job Growth 2001/07, ABIA	ABI Annual Rate	% of MKSM Complete	Adjusted MKSM Rate
Corby	24,000	14,400	n/a	720	971	162	6.7	1,033
Daventry	10,000	6,000	n/a	300	5,311	885	88.5	53
East Northamptonshire	5,000	3,000	n/a	150	3,897	650	129.9	n/a
Kettering	27,000	16,200	n/a	810	3,216	536	19.9	999
Northampton	46,000	27,600	n/a	1,380	7,150	1,192	25.9	1,573
South Northamptonshire	6,000	3,600	n/a	180	3,720	620	103.3	n/a
Wellingborough	23,000	13,800	n/a	690	-1,518	-253	-11.0	1,178
Northamptonshire	141,000	84,600	81,500	4,230	22,590	3,765	26.7	4,770
North Northamptonshire	79,000	47,400	28,500	2,370	6,605	1,101	13.9	3,138
West Northamptonshire	62,000	37,200	53,000	1,860	16,180	2,697	43.5	1,617

5.10 Table 5.2 sets out estimates of total employment change since 2001 which are compared to the annualised MKSM, LEFM and CoPELA growth 'targets'.

Northamptonshire, West Northamptonshire & North Northamptonshire

5.11 The following observations are made for the county and the two sub-areas.

- As a whole, Northamptonshire has performed slightly below target. At 2007, the county has achieved an average job growth rate of 3,765 per annum compared to the annualised MKSM figure of 4,230.
- Of the 84,600 jobs forecast for Northamptonshire, West Northamptonshire has performed relatively well having already achieved 43.5% of the total forecasted for 2021. Up to 2007, the sub-area has seen average annual job growth reaching 2,697 compared to the annualised MKSM figure of 1,860. Based on this evidence, SNEAP's target of 53,000 additional jobs over the 20 year period would appear achievable.
- In contrast, North Northamptonshire has to date been unable to meet the MKSM annualised growth targets: on average, 1,101 additional jobs per annum have been created compared to the implied MKSM annual target of 2,370. Whilst it would be expected that growth rates in the North will improve over time, as policy initiatives take effect, the performance to date highlights that challenge facing the sub-area over coming years.

District Level Performance

5.12 Table 5.2 also sets out district level employment performance over the period 2001/07 compared to the annualised MKSM target figures.

5.13 West Northamptonshire:

- The data indicates that South Northamptonshire has already exceeded its MKSM target with 3,720 jobs being created compared to the forecast 3,600 jobs. **Fulfilled MKSM Figures + Further Potential.**
- Daventry is well on the way to fulfilling its MKSM targets having experienced employment growth of 5,311, which would mean on average the district only has to increase employment by 53 jobs per annum over 2008/21. The expansion of DIRFT over this period is likely to have made a significant contribution to total employment growth recorded in Daventry. **Very Close to MKSM Figures + Further Potential.**
- Northampton is currently slightly below the MKSM annualised target growth rate. Employment increased by 7,500 between 2001 and 2007, which represents 26% of the MKSM target for the period up to 2021. **Step Change required to meet MKSM Figures.**

5.14 North Northamptonshire:

- Corby has experienced limited employment growth to date and is falling behind its annualised growth targets. Indeed, the shortfall of employment growth has resulted in the annual growth requirement rising from 720 per annum over 2001/21 to 1,033 per annum for the period 2008 to 2021. **Step Change required to meet MKSM Figures.**
- In contrast to other districts in North Northamptonshire, East Northamptonshire has already exceeded its MKSM target with employment increasing by 5,311 employees over 2001/07. **Fulfilled MKSM Figures + Further Potential.**
- Kettering is falling short in meeting its MKSM targets having achieved around 20% its job growth requirement. **Step Change required to meet MKSM Figures.**
- Wellingborough has experienced employment decline over the period 2001-07. This accentuates the existing challenge facing the district in achieving significant employment growth over the MKSM period. **Major step change required to meet MKSM Figures.**

Sector Level Performance

5.15 Table 5.3 compares the annualised MKSM growth targets for Northamptonshire by sector with actual employment change in the county during the period 2001/07.

Table 5.3 - MKSM Sector Forecasts and actual employment change 2001/07

	01/07 ABI Employment Change	01/21 Market Led Employment Change	01/21 MKSM Policy Led Employment Change	Annual Change 01/21 Market Led	Annual Change 01/21 Policy Led	Actual Annual Change 01/07 (ABI data)
Manufacturing	-7,802	-8,197	-5,823	-410	-291	-1,300
Construction	-302	7,634	7,204	382	360	-50
Wholesale & Retail	2,247	17,653	18,901	883	945	375
Transport & Communications	5,931	6,831	7,109	342	355	989
Financial & Business Services	14,581	42,144	39,548	2,107	1,977	2,430
Public administration education & health	10,176	16,309	15,499	815	775	1,696
TOTAL	22,590	84,600	84,600	4,230	4,230	3,765

5.16 Evidence of employment change by sector between 2001 and 2007 indicates the following trends:

- **Manufacturing**: ABI data shows that the sector has experienced significant decline, around 1,300 jobs a year over 2001/07, which is significantly higher than the forecasted decline in both sets of MKSM forecasts.
- **Construction**: The construction sector has also contracted significantly over the period 2001/07. Consequently, a major change in current trends would be required to achieve the MKSM target.
- **Wholesale & Retail**. There has been growth within the sector, around 375 jobs on average per annum over 2001/07, which is much lower than that scheduled in the MKSM targets, which range from 882 to 945 per annum. The expansion of distribution and logistics activities in the county will have made a major contribution to this trend.
- **Transport & Communications**. Growth in Transport and Communications is broadly in line with MKSM targets. As in the case for Wholesale, this broad sector includes a significant proportion of warehousing based activities.
- **Financial & Business Services**. The county has clearly experienced significant growth in the sector, particularly over the last 3 years which reflects national trends. Consequently, actual growth rates are broadly in line with the MKSM forecasts. However, it is important to highlight that the economic recession that commenced in 2008 is likely to impact significantly on this sector at a national and local level. It is expected that during the period 2008-2010 (at least) decline in the sector will be recorded. In light of this anticipated contraction and

heightened competition in the market, this will create an additional challenge for the county in terms of sourcing future employment growth in the future.

- **Public Administration, education & health**: The public sector has delivered a high level of employment growth in the county, to the extent that the annualised MKSM forecasts for the sector have been significantly exceeded. Whilst this is positive for the economic growth of Northamptonshire, reliance on future growth in the public sector would be a risky strategy unless firm plans for on-going investment in public sector activities can be identified. It is also important to note the county's historically low level of public sector employment with regards to regional and national levels.

District Level Sector Performance

5.17 Actual employment growth relative to MKSM targets for each of the districts are detailed in Appendix A. The main implications for each local authority are summarised in Table 5.4.

Table 5.4 – Summary of Sector Level Performance Against MKSM Figures

	Corby	East Northamptonshire	Kettering	Wellingborough	Daventry	Northampton	South Northampton
Manufacturing	Manufacturing fallen by 18% Adjusted MKSM annual growth figure- 137 jobs per annum	Appears fairly stable and has actually expanded (against forecasted decline)	Manufacturing actually increased 01/07	Fallen by 1,000 more jobs than projected to 2021	Decline faster than under MKSM	Almost declined by same amount envisage by 2021 under MKSM	Declining at much faster rate than envisaged under MKSM
Construction	Difficult to conclude due to underlying differences in data	Slightly lower than forecasted under MKSM	Slightly lower growth rate than envisaged under MKSM	Increased at a higher rate than under MKSM	Growth been marginally slower than MKSM figure	Fallen rapidly	Employment growth strong
Wholesale & Retail	Currently growing at slower rate than under MKSM figures.	Exceeded MKSM figure	Slightly lower growth rate than envisaged under MKSM	Employment fallen	In line with MKSM forecasts	Growth below rates envisaged in MKSM	Very similar to MKSM growth rates
Transport & Communications	Exceeded growth target using ABI figures	Slightly behind MKSM growth rate	Employment fallen over 2001/07	Employment fallen	Huge employment growth. Exceeded MKSM figure	Employment growth very strong	Growing at a much faster rate than under MKSM
Financial & Business Services	Although growth been strong still out of line with MKSM figures and represents high proportion of growth	Exceeded MKSM figure	Slightly lower growth rate than envisaged under MKSM	Growth rate marginally lower than MKSM	Slightly behind MKSM forecasts	Growth at similar rate to that envisaged under MKSM	Exceeded MKSM Forecast
Public administration, education & health	Although growth been strong but still out of line with MKSM figures and represents high proportion of growth	Slightly behind MKSM growth rate	Exceeding the rate of growth envisaged under MKSM.	Growth has been very strong.	Exceeded MKSM figure	Employment growth very strong	Looks in line with MKSM Growth

(green)	*Likely to exceed MKSM Figure*
(light green)	*Likely to reach MKSM Figure*
(orange)	*Potential to fall marginally short of MKSM Figure*
(red)	*Potential that MKSM Figure will not be achieved*

5.18 The key findings of this district level analysis are as follows:

- Manufacturing is declining across most districts (with the exceptions of East Northamptonshire and Kettering), and at a rate much faster than that predicted under MKSM. This has particular implications for B-use manufacturing jobs which are discussed below.
- Transport & communications and public administration, education & health have been driving growth in the county, and to a lesser degree, financial & business services. With the exception of transport and communications, there are significant uncertainties regarding the future prospects for growth in these sectors, particularly in the short term.
- In Northampton, growth has been concentrated in the public sector and transport & communications sector.

B-Use Employment Performance

5.19 Given the focus of SELA, it is essential that the analysis set out above is undertaken at a more refined level in order to assess the actual performance of B use class employment growth relative to MKSM targets. The following analysis considers B-use performance for the County as well as North and West Northamptonshire. Performance at the district level is detailed in Appendix B.

Defining B Use Class Jobs

5.20 No best practice guidance has been issued nationally or regionally in terms of defining B use class jobs using Standard Industrial Classifications (SICs). Consequently, consultants typically have produced their own definitions. In Northamptonshire, Roger Tym and Partners have developed a definition which have used in the 2006 CoPELA study as well as SNEAP. This definition is very similar to that applied by Atkins in a range of recent employment land reviews. Having re-assessed the definition, we confirm that the definition used in CoPELA and SNEAP provides the most reliable method for translating SIC employment data into B-use employment estimates. Consequently, we have retained this definition for use in SELA. For reference, the definition is provided in Appendix C.

5.21 It should be highlighted that the process of defining B-use jobs using SIC data can only be an approximate exercise. This is caused by the inability to be certain as to the type of premises occupied by businesses which fall under specific SIC codes. However, we consider that the definition provides a reasonable degree of confidence and acts as the best, currently available proxy for estimating B-use employment.

B Use Employment Change relative to MKSM targets

5.22 Table 5.5 summarises B-use employment change in Northamptonshire between 2001 and 2007 by broad sector. The main findings are as follows:

- Total B-use employment in 2007 was approximately 168,888.
- Overall growth in B-use employment has accounted for a large proportion of overall employment growth, although this is partly explained by a significant dip in employment between 2001 and 2002.
- B-use jobs growth has been highest in offices, which accounted for 16,049 jobs between 2001 and 2007.
- Jobs within industrial B-space have fallen significantly by 7,111 over the period.

5.23 In terms of the distribution between North and West Northamptonshire and each district the following key findings apply:

- B-Use jobs growth in West Northamptonshire has been much higher than in North Northamptonshire, at 13,799 compared to 5,155.

- In West Northamptonshire:
  - Growth has been highest in offices, driven by Northampton and South Northamptonshire, whilst warehousing growth has been very strong also, particularly in Daventry including DIRFT.
- In North Northamptonshire:
  - Growth has been in highest in offices, driven by Kettering and Wellingborough. Importantly in Wellingborough, despite a fall in total employment, the district has experienced relatively healthy growth in office based jobs. Employment decline has occurred particularly in industrial sectors and to a lesser degree, warehousing.
  - Corby has experienced a high growth in warehousing jobs with some limited growth in offices. However, the decline in industrial jobs has been particularly high which has dampened the effect of growth in offices and warehousing.
  - East Northamptonshire has experienced strong growth in B use jobs, particularly in warehousing (partly accounted for by Warth Park).

Table 5.5 – B-Use Employment, 2001/07, for Northamptonshire

	2001	2002	2003	2004	2005	2006	2007	2001/07	2002/07
Industrial	65,152	67,220	64,053	64,187	58,237	57,905	58,041	-7,111	- 9,178
Warehousing	36,961	39,987	39,447	41,707	43,330	46,312	46,977	10,016	6,990
Off ice	43,821	40,898	46,627	48,071	50,181	53,919	59,869	16,049	18,971
B Space Jobs	**145,934**	**148,105**	**150,128**	**153,965**	**151,748**	**158,137**	**164,888**	**18,953**	**16,783**
Non B Jobs	143,711	136,031	143,052	148,239	154,603	143,896	147,627	3,917	11,596
All Jobs	289,645	284,136	293,180	302,204	306,351	302,033	312,515	22,870	28,379

5.24 Tables 5.6-5.8 compare the annualised MKSM and SNEAP forecasts with actual change in B-use employment.

5.25 Using ABI data, the evidence strongly suggests that growth in B-use jobs are much more in line with MKSM / SNEAP targets than changes in total employment would suggest. In other words, growth in non B-use jobs has been particularly limited when compared to change in B-use jobs.

5.26 Key results from the analysis show that:

- Actual rates of growth over the last 6 years in the warehousing and office sectors have been significantly higher than MKSM and SNEAP annualised targets. In terms of total change, around 56% and 73% of the MKSM growth targets for offices and warehousing have already been met.
- Using ABI data and the CoPELA (2006) definition, B-use space is capturing most growth in the Northamptonshire economy, given that jobs growth has been less strong in non-B space activities.
- Whilst West Northamptonshire outperforms the North in meeting annualised employment growth targets, B-use employment growth in North Northamptonshire has been significant. Indeed, annual rates of growth in office employment has exceeded the target rate whilst in warehousing, recent performance has been close to the annualised target. Industrial decline, however, has been high, though the rate of loss has been lower in North Northamptonshire..

5.27 When interpreting these results for B-use employment, it is important to consider potential data limitations. For example, as shown in Table 5.1, there are significant differences between the

MKSM / SNEAP base year estimates of B use jobs compared to ABI data (the former are higher than the latter). However, given that it is employment change that is being monitored, the ABI is the single, most commonly used source of local employment data provided by the Government (ONS).

Table 5.6 - B-Use Change against MKSM/SNEAP B-Use Forecasts for Northamptonshire

	ABI	CoPELA following MKSM	SNEAP	ABI Annual	CoPELA following MKSM	SNEAP
	01/07	01/21	01/21	01/07 Annual Rate	01/21 Annual Rate	01/21 Annual Rate
Industrial	- 7,111	-277	-1,716	- 1,185	- 14	- 86
Warehousing	10,016	13,792	14,768	1,669	690	738
Off ice	16,049	28,517	33,989	2,675	1,426	1,699
B Space Jobs	18,953	42,033	47,041	3,159	2,102	2,352
Non B Jobs	3,917	42,567	53,347	653	2,128	2,667
All Jobs	22,870	84,600	100,388	3,812	4,230	5,019

Table 5.7 -B-Use Change against MKSM/SNEAP B-Use Forecasts for North Northamptonshire

	ABI	CoPELA following MKSM	SNEAP	ABI Annual	CoPELA following MKSM	SNEAP
	01/07	01/21	01/21	01/07 Annual Rate	01/21 Annual Rate	01/21 Annual Rate
Industrial	-2,474	3534	1,258	- 412	177	63
Warehousing	2,207	9,177	6,827	368	459	341
Off ice	5,421	10,250	14,989	904	513	749
B Space Jobs	5,155	22,961	23,074	859	1,148	1,154
Non B Jobs	1,409	24,439	24,297	235	1,222	1,215
All Jobs	6,564	47,400	47,371	1,094	2,370	2,369

Table 5.8 - B-Use Change against MKSM/SNEAP B-Use Forecasts for West Northamptonshire

	ABI	CoPELA following MKSM	SNEAP	ABI Annual	CoPELA following MKSM	SNEAP
	01/07	01/21	01/21	01/07 Annual Rate	01/21 Annual Rate	01/21 Annual Rate
Industrial	-4,637	-3,812	-2,974	-773	-191	-149
Warehousing	7,809	4,615	7,941	1,301	231	397
Off ice	10,627	18,267	19,000	1,771	913	950
B Space Jobs	13,799	19,071	23,968	2,300	954	1,198
Non B Jobs	2,507	18,129	29,049	418	906	1,452
All Jobs	16,306	37,200	53,017	2,718	1,860	2,651

Regional and National B Use Trends

5.28 In order to set Northamptonshire trends in context, it is helpful compare patterns of change in the county with those evident at the regional and national levels.

Table 5.9 - B-Use & Non B-Use employment change in East Midlands & England 2001-2007 (%)

	North Northamptonshire	West Northamptonshire	Northamptonshire	East Midlands	England
Industrial	-7.4	-14.6	-10.9	-12.1	-15.7
Warehousing	12.5	40.5	27.1	11.6	2.5
Off ice	45.4	33.3	36.6	34.2	14.2
B Space Jobs	8.2	16.6	13.0	6.4	1.0
Non B Jobs	2.5	2.8	2.7	10.6	6.6
All Jobs	5.5	9.5	7.9	8.7	4.1

5.29 Table 5.9 compares the percentage change in employment between 2001 and 2007 for Northamptonshire and the two sub-areas which are compared to trends for the East Midlands and England. This highlights that the high rate of growth recorded for B use jobs over the period in Northamptonshire is not reflected at either the regional or national level. Indeed, for the East Midlands, the scale of growth is more than half that of Northamptonshire. The difference is even more pronounced at the national level where growth over the period was recorded at only 1% compared to 13% in Northamptonshire (16.6% in West Northamptonshire and 8.2% in North Northamptonshire).

5.30 Conversely, the small amount of growth recorded in Northamptonshire in non B-use jobs (2.7%) is dwarfed by the scale of growth in the East Midlands (10.6%), and to a lesser degree in England (4.1%).

5.31 Overall, total employment growth in Northamptonshire between 2001 and 2007 was comparable to regional trends but well above national trends.

5.32 The evidence suggests that the county (particularly West Northamptonshire) is performing strongly in bringing forward B-use jobs when compared to regional and national trends. This may indicate that employment land policies and other initiatives introduced since being designated a Growth Area have, to date, been reasonably successful. Conversely, the county has performed poorly in terms of achieving growth in non B-use sectors such as retail. This raises potentially significant policy considerations for future policy initiatives in Northamptonshire.

Take Up of Industrial & Commercial Floorspace

5.33 The East Midlands Regional Spatial Strategy Annual Monitoring Report 2007/08 indicates that 225,697sq.m[10]. (approximately 2.5 million sq. ft.) of commercial floorspace was completed in 2007/08 in Northamptonshire. This represents 31% of all commercial floorspace developed across the East Midlands and is, by far, the most significant county in terms of new commercial space developed. This reflects Northamptonshire's designation as a Growth Area, and its policy agenda to generate the largest number of new jobs within the East Midlands.

5.34 Northamptonshire also witnessed the highest amount of take-up of employment land as shown in Table 5.10. This combined with floorspace take up highlights the strength of B space development in the county.

Table 5.10 – Completed Employment Land Northamptonshire (all sites): 2007/08 (hectares)

B1 (Office & Light Industry)	B2 (General Industry)	B8 (Storage & Distribution)	Mixed	Total
6.8	3.9[11]	19.2	27.3	57.3[12]

Source: AMR 2007/08

5.35 With respect to future employment land commitments Table 5.11 highlights that the county has a total of 328.7ha of land currently in the planning system. Theoretically, this has the potential to support up to 58,504 jobs based on standard job density assumption and an equal split of mixed use space to B use class. These commitment figures provide no indication on the quality of site or expected development timescales and as such their ability to bring forward new jobs growth should not be solely relied upon. The findings of the empirical site assessments will set out the strength of individual sites in terms of quality, viability and deliverability.

Table 5.11 – Planning Commitments Northamptonshire 2007/08 (hectares)

B1 (Office & Light Industry)	B2 (General Industry)	B8 (Storage & Distribution)	Mixed	Total
58.9	20.5	27.0	222.3	328.7

Source: AMR 2007/08

5.36 Using Valuation Office (VO) data, Table 5.12 sets the amount and distribution of industrial and commercial floorspace in Northamptonshire as at 2008. This indicates that the county has a total stock of floorspace of around 5.3 million square metres, of which 57% is in West Northamptonshire. The two sub-areas are comparable in terms of their stock of warehousing

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[10] Data for Wellingborough not available
[11] Data not available for Corby
[12] Data for Corby Industrial not available.

space. However, the North is more prominent than the West in terms of industrial stock whilst the opposite is the case for offices.

Table 5.12 – Distribution of Industrial & Commercial Floorspace 2008

Area	No. Offices	Area (000sq m)	No. Factories	Area (000sqm)	No. Warehouses	Area (000sq m)
Northamptonshire	**3,467**	**840**	**4,047**	**3,829**	**2,836**	**5,378**
Corby	210	50	516	1,044	218	726
Daventry	345	62	475	335	409	1162
East Northamptonshire	295	45	409	368	329	445
Kettering	404	93	415	449	332	447
Northampton	1335	438	1,120	819	797	1,655
South Northamptonshire	491	70	544	300	281	263
Wellingborough	387	82	568	514	470	680
North Northamptonshire	1296	270	1908	2375	1349	2298
West Northamptonshire	2,171	570	2,139	1,454	1,487	3,080

Source: Neighbourhood Statistic, Commercial & Industrial Floorspace & Rateable Value Statistics 2008

5.37 Due to a change in the assessment methodology of floorspace statistics in 2005 and inconsistencies in data categorisation, it may be misleading to compare pre-2005 floorspace data to later data. However, as the Valuation Office data is the single most comprehensive source of analysing floorspace change over time, these figures have been presented below. Whilst interpretation of floorspace change implied by the VO data should be taken with a degree of caution, the data can be used to provide a broad indication of take-up over the period 2001-2007. In order to highlight potential data inconsistencies, our analysis of floorspace change over time is set out for two periods (before and after the assessment methodology was altered):

- 2001-2008 (Tables 5.13 and 5.14);
- 2005-2008 (Tables 5.15 and 5.16).

5.38 Table 5.13 indicates that only relatively small growth has taken place in offices since 2001 (47,000 sqm). Indeed, the data suggests that office growth in North Northamptonshire was minimal at 3.1%. The majority of growth has been recorded in warehousing floorspace which has, in broad terms, been fairly equally distributed between North and West Northamptonshire. The data shows that industrial floorspace has declined by around 300,000 sqm (-7%).

Table 5.13 – Commercial and Industrial Floorspace Change 2001-08

	Offices (000sqm)	%	Factories (000sqm)	%	Warehouse (000sqm)	%	Total Bspace (000sqm)
Northamptonshire	47	5.9	-300	-7.3	1,471	37.7	1,218
North Northamptonshire	30	12.5	-160	-6.3	792	52.6	662
West Northamptonshire	17	3.1	-140	-8.8	679	28.3	556

Source: Neighbourhood Statistic, Commercial & Industrial Floorspace & Rateable Value Statistics 2008

5.39 Table 5.14 shows the distribution of floorspace change since 2001 by district / borough. This presents some unexpected conclusions such as Northampton declining in terms of office stock with Kettering recording the largest increase (in office floorspace). With the exception of South Northamptonshire, all districts and boroughs have witnessed a significant increase in warehousing floorspace since 2001.

Table 5.14 – Commercial and Industrial Floorspace Change 2001-08 by District / Borough

Area	Offices (000sqm)	Factories (000sqm)	Warehouses (000sqm)	Total (000sqm)
Northamptonshire	47	-300	1,471	1,218
Corby	0	-57	261	204
Daventry	15	3	350	368
East Northamptonshire	8	-30	125	103
Kettering	17	-16	254	255
Northampton	-9	-158	284	117
South Northamptonshire	11	15	45	71
Wellingborough	5	-57	152	100
North Northamptonshire	30	-160	792	662
West Northamptonshire	17	-140	679	556

5.40 In order to highlight some of the potential limitations of analysing floorspace change since 2001, Table 5.15 sets out recorded floorspace change since the change in assessment methodology 2005-2008). The data indicates that from 2005 to 2008 there has been an increase of some 843,000 sqm of industrial and commercial floorspace in the county. Despite discrepancies in data collection methodologies, this would suggest that the majority of growth in floorspace has occurred (and indeed accelerated since 2005). Whilst this cannot directly be translated into B-use floorspace, the data provides a reasonable proxy for assessing change in the stock of employment floorspace over this period. The table also suggests significant differences to the trends recorded for the period 2001-08 such as relatively high take-up of office floorspace in the West and a large proportion of warehousing development occurring in the North.

Table 5.15 – Commercial and Industrial Floorspace Change 2005-08

	Offices (000sqm)	%	Factories (000sqm)	%	Warehouse (000sqm)	%	Total Bspace (000sqm)
Northamptonshire	209	25	-110	-13	744	88	843
North Northamptonshire	71	13	-36	-7	507	94	542
West Northamptonshire	138	46	-74	-25	237	79	301

Source: Neighbourhood Statistic, Commercial & Industrial Floorspace & Rateable Value Statistics 2008

5.41 The large majority of new floorspace development has been in warehousing which reflects the strong market position held by the county in this sector. As reflected by the B-use job statistics, West Northamptonshire has performed strongly in delivering new office developments and the decline in industrial stock has been more pronounced in the West compared to the North.

5.42 Whilst during the period 2005-2008, a greater quantum of floorspace has come forward in the North compared to the West, this take-up has been dominated by the warehousing sector which is characterised by a low density of employment. Around 66% of high employment generating office floorspace growth during this period was recorded in West Northamptonshire.

5.43 Table 5.16 sets out the changes recorded between 2005 and 2008 at the district and borough level.

Table 5.16 – Change in Industrial & Commercial Floorspace 2005-2008 by District / Borough

Area	Offices (000sqm)	Factories (000sqm)	Warehouses (000sqm)	Total (000sqm)
Northamptonshire	209	-110	744	843
Corby	9	-9	98	98
Daventry	18	26	188	232
East Northamptonshire	13	-9	81	85
Kettering	31	10	205	246
Northampton	90	-92	47	45
South Northamptonshire	30	-8	2	24
Wellingborough	18	-28	123	113
North Northamptonshire	71	-36	507	542
West Northamptonshire	138	-74	237	301

Summary

5.44 The analysis of actual employment performance relative to annualised MKSM / SNEAP employment growth targets is helpful to monitor the extent to which the preferred economic scenarios are being achieved. The analysis is also a useful tool for informing strategic policy issues to be considered as part of this SELA study.

5.45 Trends in total employment:

- In aggregate terms, employment growth in the county is marginally behind the annualised average rate required to achieve the MKSM targets. Within the county, the West has experienced strong growth above MKSM target rates whilst growth in the North has been significantly below the target rates.
- In manufacturing sectors, the actual rate of decline has been much more substantial than that forecasted.
- Growth has been strongest in transport and communications, financial and business services and in the public sector. Given the likely impact of the recession on the financial sector and the uncertainties surrounding future investment in public sector jobs in Northamptonshire, it is important not to assume that recent rates of employment growth will be repeated in future years.

5.46 In terms of B-use trends since 2001:

- Overall, the county is achieving B-use employment growth above that implied by MKSM and SNEAP.
- Growth in offices and warehousing B-use jobs has been very strong.
- Decline in industrial B-use has been substantial.
- The West is driving growth, exceeding even the SNEAP implied rates of change.
- Although the North is performing below the rate targeted under SNEAP, the rate of growth is much stronger for B-use jobs compared to trends in total employment.

5.47 Evidence provided by analysis of ABI data suggests that the county is performing strongly in bringing forward B-use jobs when compared to regional and national trends.

5.48 In terms of change in the stock of commercial and industrial floorspace in Northamptonshire (over the period 2005-2008), the majority of growth has occurred in the warehousing sector. This indicates the county's strength as a logistics location. The North has dominated in terms of developing new warehousing space whilst the West has led in terms of office space.

5.46 Analysis indicates that the county has performed strongly in B-use jobs and floorspace. This may indicate that employment land policies and other initiatives introduced have, to date, been reasonably successful. Conversely, the county has performed poorly in terms of achieving growth in non B-use sectors such as retail and leisure. This requires a significant shift in policy initiatives for Northamptonshire, including strong and effective policies which will drive forward key and wider town centre regeneration proposals within the Northampton Central Area and town centres within the district and boroughs of Northamptonshire.

6. SELA Growth Scenarios

Introduction

6.1 Building on the substantial body of existing forecasting work carried out for Northamptonshire and actual economic performance of the county since 2001, this Section sets out a series of discrete employment growth scenarios for the county. The purpose of the analysis contained in this Section is to test a range of potential growth options for the county and its constituent areas whilst avoiding duplication of scenario development work that has already been undertaken.

6.2 Three key scenarios are presented using different techniques and assumptions:

- **Dwellings and population led scenario**: This estimates the job growth requirements that would emerge if the county and its districts seek to plan for a balance between planned housing and employment change.
- **Econometric / Trend based scenario (Tempro v5.4):** This estimates future employment change that is likely to occur without significant policy interventions. Forecasts are based on existing industrial structures and historical trends.
- **Policy Scenario:** This scenario, in effect, has already been established by the SNEAP preferred economic scenario. The only change that has been made has been to roll forward the employment growth estimates to 2031.

6.3 Under each scenario, estimates of future total employment and B-use employment change have been provided for the periods 2001-2026 and 2001-2031. The implications of each employment growth scenario on demand for B-use floorspace have also been provided. A preferred-scenario is identified at the end of the Section.

6.4 Figure 4.1 summarises the key steps taken in development of the scenarios.

Figure 6.1 - SELA Forecasts

Starting Point

MKSM: Employment Targets 2001/31

- 79,000 North Northamptonshire
- 62,000 West Northamptonshire

Primary Assumption:

Intervention to deliver Growth Agenda: Shifting Jobs Growth to North Northamptonshire.

Primary Conflict:

Trend indicates Jobs Growth in West Northamptonshire > North Northamptonshire

Resolution/Options:

Either continue to focus interventions on shifting jobs from West to North

OR

Develop higher job targets in the West, but not at expense of Jobs growth in the North

OR

Follow market trend, reduce jobs growth in the North and develop higher job targets for the West.

Dependent Factors:

- Strength of Northamptonshire Regeneration Policy and Interventions Vs Market Trends (& economic recession in the short term).
- Strength of housing growth agenda to inform regeneration policy. For instance unemployment is low & economic activity high. Jobs growth dependent on new population growth.

- ***SELA Scenarios:*** Designed to test the balance of these factors in relation to employment floorspace requirements.
- ***Dwelling Led Scenario***: What are the true implications of the Growth Agenda if economic growth is sustainable?
- ***Trend- Led Scenario***: If demand side trends were to continue what are the implications for economic growth?
- ***Policy Led Scenario***: If regeneration policy, following SNEAP, succeeds what could be the aspirational targets? What would be the underlying assumptions?

Scenario 1 - Dwellings & Population Led

6.5 The first scenario is a supply-led approach to estimating potential future employment levels with the underlying aim to achieve a reasonable balance between housing growth and employment change.

6.6 At the heart of the growth agenda is to achieve a high level of sustainability, through aligning workforce growth from planned housing development with the creation of new jobs in the county.

6.7 This scenario prepares forecasts which reflect the housing target figures contained in the MKSM Sub Regional Strategy and RSS8. The basic aim of the scenario is to estimate the level of resident employment that could arise from an increase in the population. Sensitivity testing has also taken place in respect of dwellings to job ratios implied by the scenario and compared to actual rates in 2001 and those envisaged in the original MKSM strategy.

Supply Side Technique

6.8 Essentially this technique calculates the projected resident population based on dwelling completion rates in the future and converts it into employment / workforce projections to provide quantitative forecasts. This takes as its starting position the 2001 dwelling stock and the district dwelling projections over the period 2001/31.

Translation to Employment

6.9 The housing growth targets are translated into estimates of resident population and then workforce / employment levels for each district through the following steps:

- New Households and Resident Population: The starting point is to convert housing growth estimates into households by applying the following formula: Dwellings- No of shared dwellings + No. of household spaces in shared dwellings*Dwelling vacancy rate. The proportion of shared dwellings and number of household spaces in shared dwellings has been kept constant from 2001 throughout the forecasting period. The dwelling vacancy rate is taken as the DCLG 6 year rolling average (2001/07). The resident household population was then calculated by applying DCLG household size projections for each district from 2004 to 2029 (the projection for 2029 was also applied to 2030 and 2031).
- Working Age Population: Resident population translated into to employment / workforce is to convert the increase in resident population into those persons of working age. In this model, the working age outputs over time provided by the NCC Demographic Model have been applied. The NCC model projects in more detail the effects of localised variables, such as ageing and natural change, to a larger extent than the ONS population projections.
- Economic Activity: The economic activity rate of the working age population was calculated by examining values of recent rates within each district, from 2001 to 2008 taken from the Annual Population Survey (APS). These were not simply averaged but adjusted for outliers, as some rates were inconsistent. The rates generally are high in Northamptonshire and it has been assumed that these high rates will continue.
- Employment Rate. The same process was undertaken for the employment rate, where data from the APS was examined and averaged out for each district.
- Commuting. The commuting figures have a large impact on the outputs of this supply-side scenario. Clearly, the larger the proportion of the future resident workforce that are employed outside of Northamptonshire, the smaller the job growth estimates will be. Given that the MKSM strategy aims to achieve sustainable growth, the model assumes that absolute commuting patterns recorded by he 2001 Census remain fixed over the forecasting period. In other words, it is assumed that 100% of all future forecast growth in the resident workforce (through new housing development) will be provided with employment within the County (no net additional out-commuting or in-commuting).

Assumptions

6.10 The main difficulty with using supply-led approaches to estimate future employment change is that the relationship between employment growth and population growth is not fixed with evolving variables such as changing employment rates and changing commuting patterns.

6.11 Additional residents may not simply mean more jobs. For example, new residents attracted to live in the area may retire, be economically inactive or unemployed. Also additional residents may be employed outside of the area and commute from the area in which they live to another area. Consequently, changing demographic and other factors mean that the application of a fixed dwellings to jobs ratio over the forecasting period is not a suitable or reliable approach to underlie this scenario.

Advantages

6.12 Supply side modelling is generally accepted as being more reliable for forecasting the direction of an economy over the longer-term as the long-term variables change relatively slowly over time. Numerous economic models, including the HM Treasury's long-run fiscal projections, view long-term economic growth as a function of productivity and employment. This long-term county model is consistent with this type of approach in that it uses demographics and the employment rate to predict long-run employment.

Disadvantages

6.13 All economic models are subject to limitations based on both the historic data and the assumptions used to build them. As a result, there is a danger in placing too much emphasis on the results of an economic model, particularly at lower geographical levels. This is particularly pertinent when considering the demand for housing and employment growth. Economic modelling does not always capture some of the more complex relationships that occur between these variables at a local level, as where someone chooses to live and work is determined by many factors such as housing quality, community, privacy and environment as well as employment opportunities.

6.14 The information is also telling us about the number of people who live and work in an area but cannot tell us about the sectors they will work in and so cannot indicate the need for employment land.

Results

6.15 Table 6.1 sets out the assumed planned housing growth figures which underlie the estimates of future workforce / employment generation up to 2031. The dwellings provision figures follow those set in the RSS for North Northamptonshire and West Northamptonshire up to 2026. The district distributions between 2021 and 2026, which the RSS does not provide, follow the district distribution CSS figures in the case of North Northamptonshire. For Daventry, Northampton and South Northampton it is assumed that these follow the same annual provision figures for 2016-21.

6.16 The RSS does not cover the period 2026/31. Therefore in order to provide a dwelling based projection up to 2031 the districts of North Northamptonshire follow those set out in the CSS and for West Northamptonshire replicate the annual provision rates for 2016/21.

Table 6.1 - Dwelling Projections as in MKSM SRS, RSS and North Northamptonshire CSS

	2001/06	**2006/11**	**2011/16**	**2016/21**	**2021/26**	**2026/31**	**Total 2001/26**	**Total 2001/31**
Corby	560	680	1,060	1,060	*1,060*	*1,060*	*22,100*	*27,400*
Wellingborough	595	595	685	685	*685*	*685*	*16,225*	*19,650*
East Northamptonshire	520	520	420	420	*420*	*420*	*11,500*	*13,600*
Kettering	550	810	630	630	*630*	*630*	*16,250*	*19,400*
North Northamptonshire	**2,225**	**2,605**	**2,795**	**2,795**	**2,795**	***2,795***	**66,075**	***80,050***
Daventry	540	540	540	540	*540*	*540*	*13,500*	*16,200*
South Northamptonshire	330	330	330	330	*330*	*330*	*8,250*	*9,900*
Northampton	1,300	1,450	1,775	1,775	*1,775*	*1,775*	*40,375*	*49,250*
West Northamptonshire	**2,170**	**2,320**	**2,645**	**2,645**	**2,645**	**2,645**	**62,125**	***75,350***

***Italics denote housing provision figures based on assumptions as these are not provided in RSS8.*

Table 6.2 – Dwellings-Led Projections, 2001/31 and MKSM Employment Targets

	Dwelling Method Results			MKSM Employment Targets			
	2001/21	2001/26	2001/31	Average Annual Growth (dwellings-led)	2001/21	2001/31	Average Annual Growth
Corby	15,772	20,007	24,992	833	14,400	24,000	800
Wellingborough	9,679	11,625	14,603	487	13,800	23,000	767
Kettering	9,457	11,099	13,789	460	16,200	27,000	900
East Northamptonshire	6,275	6,717	8,334	278	3,000	5,000	167
Daventry	7,479	8,722	11,133	371	6,000	10,000	333
Northampton	22,899	27,903	35,554	1,127	27,600	46,000	1,533
South Northamptonshire	8,763	9,928	11,495	383	3,600	6,000	200
North Northamptonshire	41,183	49,448	61,718	2,057	47,400	79,000	2,633
West Northamptonshire	39,141	46,554	58,182	1,881	37,200	62,000	2,067
Northamptonshire TOTAL	80,324	96,002	119,899	3,939	84,600	141,000	4,700

6.17 Overall this approach projects required employment/workforce increases of 96,002 and 119,899 for the periods 2001/26 and 2001/31. The dwellings-led approach implies a jobs requirement which is lower than the MKSM targets, particularly over the longer term period to 2031. This reflects the effect of applying the NCC projections of change in working age population which assume an ageing population over time (resulting in a lower available workforce than what would be the case if a fixed dwellings: jobs ratio was assumed over the forecast period). However, it should be noted that any significant increase in the average retirement age would have an upward impact on the available future workforce in the county. Conversely to this, emerging policy considerations such as increasing the statutory age for remaining in education or training may further reduce the labour supply.

6.18 Total employment growth for 2001/26 and 2001/31 for West Northamptonshire is slightly lower but broadly in line with the MKSM targets. In North Northamptonshire the dwellings-led approach results in a significantly lower number of jobs / workers compared to the MKSM targets.

6.19 For individual districts, the Corby and Daventry projections are in line with MKSM targets with the latter projected to grow at a slightly higher rate. Employment change in Kettering, Wellingborough and Northampton is significantly lower than the MKSM targets whilst the projected change in East Northamptonshire and South Northamptonshire is significantly higher.

Jobs: Dwelling Ratio

6.20 There is no benchmark target for the "right" ratio of jobs to housing. A low jobs/housing ratio indicates a housing-rich area, while a high jobs/housing ratio typically indicates an employment centre.

6.21 Table 6.3 below provides the following:

- The jobs: dwelling ratio in 2001, using the number of dwellings according to the Census and employment figures from ABI for the same year.

- The ratio inferred by the MKSM targets.
- The ratio that emerges from the dwelling-led projections.

Table 6.3 – Jobs: Dwellings ratio

	2001 Jobs: Dwelling Ratio	MKSM Jobs: Dwelling Ratio, 2031	Dwellings-Led Approach Jobs: Dwelling Ratio, 2026	Dwellings-Led Jobs: Dwelling Ratio, 2031
Corby	1.30	1.07	1.12	1.10
Wellingborough	0.74	1.07	0.98	0.93
Kettering	0.68	1.00	0.87	0.73
East Northamptonshire	0.92	0.67	0.73	0.87
Daventry	1.09	1.02	0.93	0.97
Northampton	0.98	1.21	1.12	0.93
South Northampton	1.42	0.88	0.93	1.11
North Northamptonshire	0.97	1.07	0.93	0.92
West Northamptonshire	1.18	1.11	1.05	1.04
Northamptonshire	1.04	1.09	1.03	0.98
East Midlands	0.98	n/a	n/a	n/a
England	1.04	n/a	n/a	n/a

6.22 In 2001, the average ratio for Northamptonshire was 1.04 jobs per dwelling, which was on par with the national average of 1.04. This is the same as the MKSM inferred ratio in 2031, which reflects the strategy's aim to achieve balanced growth between housing and employment.

6.23 The areas with the highest jobs: dwelling ratio in 2001 were Northampton and Corby whilst East Northamptonshire and South Northamptonshire displayed the lowest levels. However, in the MKSM forecast ratios for Corby and Northampton are significantly lower as planned housing growth accelerates.

6.24 The dwellings-based projections are slightly different at 2026 and 2031 compared to the 2001 position and the MKSM forecast: the dwellings-led method implies a ratio which falls below 1.0 after 2026. This reflects a significant decline in the working age population in the last five years of the forecast period.

6.25 Another key factor which significantly influences the jobs: dwellings ratio is the assumption made in respect of commuting. The method adopted under this scenario has been to keep absolute commuting rates constant through the forecasting period (i.e. all additional working residents are assumed to be employed in the County). If, for example, it was assumed that employment centres in Northamptonshire were to attract a significant increase in in-commuting, the jobs: dwellings ratio would increase. Conversely, if it is assumed that out-commuting is to increase significantly, the ratio would decline.

B Use Employment

6.26 Given that the dwellings-led approach is based on projections of working-age population resulting from housing growth, the model does not contain a sectoral breakdown. Consequently, it is not possible to produce a direct projection of B use jobs. However, it is possible to apply assumptions in order to provide an illustration of the B-use component of the scenario. This is set out in Table 6.4 which is based on the application of the B-use breakdown set out in SNEAP at 2026.

Table 6.4 – Dwellings-Led Approach: Indicative B Use Jobs

	2001-26	2001-31
North Northamptonshire		
Industrial	1,865	2,327
Warehousing	6,699	8,362
Off ice	16,723	20,872
B Space Jobs	25,286	31,561
Non B Jobs	24,162	30,157
All Jobs	49,448	61,718
% of B Space Jobs	*51.1*	*51.1*
West Northamptonshire		
Industrial	-2,002	-2,503
Warehousing	6,647	8,307
Off ice	17,445	21,802
B Space Jobs	22,090	27,607
Non B Jobs	24,464	30,575
All Jobs	46,554	58,182
% of B Space Jobs	*47.4*	*47.4*
Northamptonshire		
Industrial	-138	-175
Warehousing	13,346	16,669
Off ice	34,168	42,675
B Space Jobs	47,376	59,168
Non B Jobs	48,626	60,732
All Jobs	96,002	119,900
% of B Space Jobs	*49.3*	*49.3*

Scenario 2 - Econometric / Trend Led

6.27 This scenario relies on outputs of the Tempro model (as originally used in MKSM) which is a trend-based econometric model. Consequently, it reflects existing industrial structures in

Northamptonshire as well as historical patterns of change. This scenario should be regarded as the economic baseline or 'business-as-usual'. The main results are set out in Tables 6.5 and 6.6.

6.28 The Tempro model has been developed by the Department of Transport for the purposes of modelling for multi-modal population and employment demand projections at the local authority level. Details of the model are provided on the DfT's website: http://www.dft.gov.uk/pgr/economics/rdg/pgetemproplandatguidntes.

6.29 The following forecasts are presented:

- An update of the Tempro forecasts, using Tempro v.5.4; and by means of comparison,
- The LEFM forecasts, produced by Cambridge Econometrics, as part of the SNEAP work.

Table 6.5 - Total Employment 2001/31, TEMPRO

	2001	2011	2021	2026	2031	2001/21 Total Change	2001/31
Corby	32,970	37,126	38,022	39,842	42,014	5,052	9,044
East Northamptonshire	29,245	33,751	34,491	36,072	37,939	5,246	8,694
Kettering	38,113	46,821	48,959	52,118	55,791	10,846	17,678
Wellingborough	37,446	43,766	44,933	47,174	49,813	7,487	12,367
Daventry	35,055	41,368	42,497	44,638	47,148	7,442	12,093
Northampton	125,214	156,423	162,656	172,775	184,575	37,442	59,361
South Northamptonshire	31,811	37,281	38,005	39,775	41,862	6,194	10,051
North Northamptonshire	137,774	154,963	166,405	175,206	185,557	28,631	47,783
West Northamptonshire	192,080	224,357	243,158	257,188	273,585	51,078	81,505
Northamptonshire	329,854	379,320	409,563	432,394	459,142	79,709	129,288

Table 6.6 - Total Employment 2001/31, TEMPRO

	2001	2011	2021	2026	2031	2001/26 Total Change	2001/31
North Northamptonshire	137,774	154,963	166,405	175,206	185,557	37,432	47,783
West Northamptonshire	192,080	224,357	243,158	257,188	273,585	65,108	81,505
Northamptonshire	329,854	379,320	409,563	**432,394**	459,142	102,540	129,288

6.30 Overall total employment growth forecast for the period 2001/31 just falls short of the at MKSM target (129,000 compared to 141,000). However, this conceals the fact that the Tempro results imply strong growth in West Northamptonshire with low growth in North Northamptonshire.

Indeed, this trend-based method indicates that West Northamptonshire will significantly exceed the MKSM forecasts (81,500 compared to 62,000) whilst the opposite is the case for North Northamptonshire (47,800 compared to 79,000). This reflects the scenario whereby the two economies continue to operate on the basis of past performance and existing structural strengths and weaknesses.

TEMPRO vs LEFM (SNEAP)

6.31 As a reality-check, we have compared the outputs of the Tempro model with those of the LEFM, prepared by Cambridge Econometrics as part of SNEAP. In order to undertake the comparison, this can only look at the period 2001-2021. Table 6.7 shows that the results of the two models are very similar.

Table 6.7 - LEFM vs TEMPRO, 2001/21

	2021 LEFM	2021 Tempro	Total Change 2001/21 LEFM	Total Change 2001/21 Tempro
North Northamptonshire	161,928	166,405	28,500	28,631
West Northamptonshire	246,791	243,158	53,017	51,078
Northamptonshire	408,719	409,563	81,517	79,709

B Use Employment

6.32 Table 6.8 sets out estimates of B use employment which emerges from the econometric model. It should be noted that the results set out in Table 6.8 are indicative only given the limited sectoral breakdown provided by the Tempro model. The B-use breakdown provided in the table are adopted from the sectoral results of the LEFM model which, as demonstrated above, are comparable to that provided by Tempro.

Table 6.8 – Econometric Model: B-Use Jobs Implications

	2001-26	2001-31
North Northamptonshire		
Industrial	-14,108	-18,010
Warehousing	12,586	16,066
Off ice	30,914	39,462
B Space Jobs	29,397	37,526
Non B Jobs	8,035	10,257
All Jobs	37,432	47,783
% of B Space Jobs	*78.5*	*78.5*
West Northamptonshire		
Industrial	-6,672	-8,352
Warehousing	8,077	10,111
Off ice	31,968	40,019
B Space Jobs	33,378	41,784
Non B Jobs	31,730	39,721
All Jobs	65,108	81,505
% of B Space Jobs	*51.3*	*51.3*
Northamptonshire		
Industrial	-20,780	-26,362
Warehousing	20,663	26,177
Off ice	62,882	79,481
B Space Jobs	62,775	79,311
Non B Jobs	39,765	49,977
All Jobs	102,540	129,288
% of B Space Jobs	*61.2*	*61.3*

6.33 Table 6.8 indicates that the trend-based model results in a significant increase in B use employment across the county but particularly in North Northamptonshire. This reflects current trends were employment growth has been pronounced in B use sectors.

Scenario 3 - Policy Led

6.34 The policy led scenario follows the preferred economic forecast established by SNEAP (i.e. the tested and agreed job targets set through the adopted North Northamptonshire Core Spatial Strategy and the market led growth envisaged for West Northamptonshire produced by the LEFM the trend led model within SNEAP). Consequently, this policy-led scenario replicates SNEAP for the period up to 2026 and rolls it forward to 2031 using a policy and market forecast trend-based trajectory.

Employment growth rate assumptions

6.35 The employment growth rates required to meet the SNEAP preferred economic scenario are set out in Table 6.9 and compared to the underlying growth rates provided by the Tempro trend-based model. The table demonstrates that the growth rates assumed by SNEAP for North Northamptonshire are significantly higher than those which emerge from a trend-based model. Consequently, to achieve this level of growth, the following key factors will need to be met, particularly in North Northamptonshire:

- Additional employment growth in those sectors that have higher relative productivity (compared with the UK excluding London).
- Those sectors that have lower relative productivity need to achieve stronger growth in productivity (to move towards the higher UK excluding London rate by 2021).
- Additional employment growth in **all sectors** similar to the East Midlands and UK growth rates.
- Halting contraction in declining manufacturing sectors.
- Increasing the employment growth rates for beyond the East Midlands and UK averages in key sectors, namely: Food, Drink & Tobacco, Electronics, Electrical Engineering & Instruments, Motor Vehicles, Manufacturing, Construction, Retailing, Hotels & Catering, Communications, Banking & Finance, and Insurance & Professional Services.

Table 6.9 - Employment Growth Rate Assumptions *(in brackets are the Tempro rates)*

	2005/10	2010/21	2021/26
North Northamptonshire	1.6 *(1.2)*	1.7 *(0.8)*	1.8 *(1.0)*
West Northamptonshire	1.0 *(1.5)*	1.1 *(0.9)*	1.2 *(1.1)*
Northamptonshire	1.2 *(1.4)*	1.3 *(0.8)*	1.4 *(1.1)*
East Midlands	*0.5*	*0.6*	
UK	*0.8*	*0.7*	

6.36 It is important to note that the 47,400 jobs planned for the period up to 2021 in the North Northamptonshire Core Strategy reflects national policy drivers as set out in the MKSM strategy and was subject to significant testing through the CSS Examination and founded on a robust evidence base. Therefore, the SNEAP preferred economic scenario that takes this forward for North Northamptonshire has been underpinned by a rigorous process which tested the policy scenario in the CSS against trend-based and other scenarios that are set out in this document.

6.37 Table 6.10 reproduces the SNEAP ‘policy’ scenario for the period to 2026 and, for indicative purposes, rolls forward the growth requirements to 2031.

Table 6.10 – Policy/SNEAP-Based Employment Growth Scenario 2001-2031

	2001-26	2001-31
North Northamptonshire		
Industrial	2,418	2,902
Warehousing	8,687	10,424
Off ice	21,684	26,021
B Space Jobs	32,788	39,346
Non B Jobs	31,330	37,596
All Jobs	64,118	76,942
% of B Space Jobs	*51.1*	*51.1*
West Northamptonshire		
Industrial	-2,930	-3,516
Warehousing	9,726	11,671
Off ice	25,526	30,631
B Space Jobs	32,322	38,786
Non B Jobs	35,797	42,956
All Jobs	68,119	81,743
% of B Space Jobs	*47.4*	*47.4*
Northamptonshire		
Industrial	-512	-614
Warehousing	18,412	22,094
Off ice	47,210	56,652
B Space Jobs	65,110	78,132
Non B Jobs	67,126	80,551
All Jobs	132,237	158,684
% of B Space Jobs	*49.24*	*49.2*

B Use Floorspace

6.38 Applying widely accepted floorspace: worker ratios, as adopted by the North Northamptonshire JPU in January 2008 and the East Midlands Regional Employment Land Assessment, Details of turning employment numbers into floorspace are attached in Appendix C. These figures are an average and as such, job density will vary on a site by site bass reflecting the individual specific development constraints and opportunities. Figures provided are gross internal floorspace, but considered net of site area. Tables 6.11-6.13 provide an indication of the gross floorspace requirements to meet the job growth estimates produced by the three scenarios described earlier. For the county as a whole, the three scenarios indicate a range in gross need/demand for additional B-use floorspace of:

- 1.8 million sq.m to 2.5 million sq.m for the period 2001-2026; and
- 2.2 million sq.m to 2.9 million sq.m for the period 2001-2031.

Table 6.11 – Gross B-Use Floorspace – Dwellings / Population Model

	2001-26	2001-31
North Northamptonshire		
Industrial	65,267	81,462
Warehousing	589,551	735,842
Off ice	301,010	375,702
Total B Floorspace	955,828	1,193,006
West Northamptonshire		
Industrial	-70,085	-87,590
Warehousing	584,932	731,034
Off ice	314,010	392,442
Total B Floorspace	828,858	1,035,885
Northamptonshire		
Industrial	-4,818	-6,128
Warehousing	1,174,483	1,466,875
Off ice	615,020	768,144
Total B Floorspace	1,784,685	2,228,892

Table 6.12 – Gross B-Use Floorspace – Econometric Model

	2001-26	2001-31
North Northamptonshire		
Industrial	-493,790	-630,337
Warehousing	1,107,540	1,413,806
Off ice	556,450	710,324
Total B Floorspace	1,170,201	1,493,794
West Northamptonshire		
Industrial	-233,514	-292,323
Warehousing	710,797	889,807
Off ice	575,418	720,333
Total B Floorspace	1,052,702	1,317,818
Northamptonshire		
Industrial	-727,304	-922,659
Warehousing	1,818,337	2,303,613
Off ice	1,131,868	1,430,658
Total B Floorspace	2,222,902	2,811,611

Table 6.13 – Gross B-Use Floorspace – Policy Scenario

	2001-26	2001-31
North Northamptonshire		
Industrial	84,630	101,556
Warehousing	764,456	917,347
Off ice	390,312	468,374
Total B Floorspace	1,239,398	1,487,278
West Northamptonshire		
Industrial	-102,550	-123,060
Warehousing	855,888	1,027,066
Off ice	459,468	551,362
Total B Floorspace	1,212,806	1,455,367
Northamptonshire		
Industrial	-17,920	-21,504
Warehousing	1,620,344	1,944,413
Off ice	849,780	1,019,736
Total B Floorspace	**2,452,204**	**2,942,645**

Overview

6.39 Table 6.14 summarises the range of SELA scenario jobs growth outputs relative to the MKSM forecasts.

6.40 The dwellings-led and Tempro forecasts are significantly lower than the MKSM 2031 target, ranging from 118,200 to 129,000. The dwellings-led approach does imply high employment growth required in North Northamptonshire although this reflects a 'sustainable solution' whereby expansion in the resident workforce is matched by local jobs growth. Achieving such a scenario is a demanding challenge.

6.41 The Tempro forecast includes an additional scenario variation to incorporate potential effects of the economic downturn. This assumes a decline in employment during 2009 and 2010. This variation indicates that the recession has the potential to have a significantly dampening effect on job growth in the county.

Table 6.14 – Employment Growth Scenarios 2001/31

Scenario	Northamptonshire	North Northamptonshire	West Northamptonshire
Scenario 1 – Dwellings / Population Led	118,163	61,718	56,445
Scenario 2a – Trend Led / Tempro Update	129,500	47,783	81,505
Scenario 2b - Tempro Update accounting for Recession, assuming 2.3% fall in employment 2009	112,220	41,025	71,195
Scenario 3 - Policy Led – Preferred SNEAP Scenario	132,200 (2026) 158,684 (if rolled forward to 2031)	64,100 (2026) 76,942 (if rolled forward to 2031)	68,100 (2026) 81,742 (if rolled forward to 2031)
MKSM	141,000	79,000	62,000

Preferred Scenario

6.42 The results of the three scenarios set out above provide a useful benchmark for assessing the extent of the challenge established by MKSM and SNEAP. The results indicate that the rolled-forward SNEAP scenario establishes challenging targets for the county but particularly in North Northamptonshire. For both North and West Northamptonshire, the dwellings-led scenario suggests that significantly more jobs over and above the additional workforce created by new housing growth will need to be provided in order to meet MKSM and SNEAP jobs growth targets. This implies either a significant increase in in-commuting and/or a significant reduction in out-commuting from these areas, a policy widely recognised in local economic development strategies.

6.43 Despite the challenges presented in planning to meet the SNEAP jobs growth targets and indeed the dwellings-led job growth figures, it is important to emphasise that the SNEAP jobs growth figures have already been widely accepted in the county as the basis on which to plan for economic development in accordance with the government's growth agenda. This position is reinforced by the fact that both West and North Northamptonshire are progressing well in terms of achieving healthy rates of growth in B-use jobs although the opposite is the case for non B-use jobs.

6.44 As highlighted by PPS4 and Government Guidance on ELRs, the jobs 'targets' defined by Scenario 3 should be treated as figures for monitoring purposes only and that a reasonable degree of flexibility should be employed in their interpretation for policy purposes.

6.45 Furthermore, Government Guidance has also set out a strong case for planning for jobs growth on the basis of strategic, functional economic geographies. Reflecting on this guidance and our analysis of functional economic areas in Northamptonshire (Section 3), we firmly recommend that the jobs growth and associated floorspace provision targets are based on the strategic areas defined by North and West Northamptonshire. There is a danger that by focussing on district-level jobs and floorspace targets brings with it the potential to distort the efficient operation of the market and the ability of the county to respond quickly to changing business needs. Consequently, we recommend that LDF policies enable employment land and floorspace supply to be sufficiently flexible so is that the sub-areas as a whole (rather than individual districts) can respond by providing the right sites at the right time to meet the needs of the market. Adherence to strict district-level targets may result in the challenge to meet future jobs growth aspirations being unnecessarily accentuated. Despite this, we have provided an indicative spatial distribution of jobs and floorspace provision by district. This distribution is set out only to assist in providing broad parameters for local authorities on which to develop key site allocations and associated policies.

Alternative Warehousing / B8 Scenario

6.46 It is important to highlight that the warehousing / B8 floorspace requirements are based on the assumption of a relatively low employment floorspace to jobs ratio (88 sqm per job). There is potential that a significant proportion of the county's warehousing 'requirement' could be provided through the development of viable and deliverable sites which primarily serve local and sub-regional rather than regional and national logistics markets. This may have the effect of increasing the employment density at many sites, the impact of which would be to reduce the overall B8 / warehousing floorspace requirement. For example, assuming that 50% of the county's B8 jobs requirement was to be developed at a low density of 88 sqm per job with the remaining 50% developed at a higher density of 55 sqm per job, this would have the effect of reducing the overall preferred strategy for warehousing in the county as follows:

- from 917,347 sqm to 719,284 sqm in North Northamptonshire; and
- from 1,027,066 sqm to 805,313 sqm in West Northamptonshire.

6.47 This floorspace requirement needs to recognise the significant existing vacant floorspace available in Northamptonshire. Further to this, and based on the need to ensure sites likely to come forward and have realistic market demand, considerations should be given to potential for alternative B and non B uses on such sites, to maximise effectiveness and efficiency of land use.

6.48 A further discussion regarding the potential future positioning of the Northamptonshire B8 / warehousing market is presented in Section 10 of this report.

Indicative Spatial Distribution

6.49 As highlighted above and in accordance with government guidance, we advocate a sub-regional approach to establishing future jobs growth and gross internal floorspace needs in Northamptonshire. However, in line with the emerging guidance with PPS4 and to assist individual local authorities and the JPUs in planning for local employment needs, indicative spatial distributions are provided below. These are based on extrapolations of adopted policy in North Northamptonshire Core Spatial Strategy and Tempro econometric modelling in West Northamptonshire. These should be used to guide employment land provision in the county's districts and boroughs although they should not be applied in a prescriptive manner. .

North Northamptonshire

6.50 Tables 6.15 and 6.16 set out the indicative distribution across districts and boroughs in North Northamptonshire for the periods up to 2026 and 2031. Tables 6.17 and 6.18 provide the equivalent estimates in terms of future B use floorspace requirements.

6.51 The spatial distribution for North Northamptonshire is based on rolling forward the SNEAP preferred jobs growth scenario by district / borough to 2026 and 2031. The sectoral split (in terms of industrial, warehousing and office jobs) is based on that set out in the Core Strategy for North Northamptonshire. Given that the Core Strategy is an adopted Development Plan Document which has been fully tested through Public Examination, we consider that this approach provides the most robust and appropriate means of illustrating the potential distribution of jobs and floorspace in North Northamptonshire, reflecting adopted locations and scale of growth and settlement patterns.

Table 6.15 – Jobs Distribution – North Northamptonshire 2001-2026

	Corby	East Northamptonshire	Kettering	Wellingborough	North Northamptonshire
Industrial	1,552	-343	915	293	2,417
Warehousing	3,350	773	1,721	2,844	8,687
Office	4,748	4,515	6,317	6,104	21,684
B Space Jobs	9,649	4,945	8,953	9,241	32,788
Total Jobs	18,370	7,061	21,914	16,773	64,118

Table 6.16 – Jobs Distribution – North Northamptonshire 2001-2031

	Corby	East Northamptonshire	Kettering	Wellingborough	North Northamptonshire
Industrial	1,863	-412	1,098	353	2,902
Warehousing	4,019	928	2,064	3,412	10,423
Office	5,697	5,418	7,581	7,325	26,021
B Space Jobs	11,579	5,934	10,743	11,090	39,346
Total Jobs	22,044	8,473	26,297	20,128	76,942

Table 6.17 – Floorspace Distribution – North Northamptonshire 2001-2026 (sq.m)

	Corby	East Northamptonshire	Kettering	Wellingborough	North Northamptonshire
Industrial	54,323	-12,008	32,060	10,255	84,630
Warehousing	294,769	68,024	151,434	250,230	764,456
Office	85,457	81,271	113,710	109,873	390,312
Total Floorspace	434,549	137,287	297,204	370,358	1,239,398

Table 6.18 – Floorspace Distribution – North Northamptonshire 2001-2031 (sq.m)

	Corby	East Northamptonshire	Kettering	Wellingborough	North Northamptonshire
Industrial	65,197	-14,412	38,418	12,353	101,556
Warehousing	353,709	81,625	181,748	300,264	917,347
Office	102,549	97,526	136,453	131,845	468,374
Total Floorspace	521,455	164,740	356,619	444,462	1,487,277

West Northamptonshire

6.52 Tables 6.19 and 6.20 set out the indicative distribution across districts and boroughs in West Northamptonshire for the periods up to 2026 and 2031. Tables 6.21 and 6.22 provide the equivalent estimates in terms of future B use floorspace requirements.

6.53 The approach taken to providing the indicative distribution in West Northamptonshire is different to that applied in the North. For the latter, the distribution reflects a strong policy push to accelerate employment growth over and above market trends. For the West, the distribution is based on forecast employment growth by sector reflected in the market trend-based model (Tempro).

Table 6.19 – Jobs Distribution – West Northamptonshire 2001-2026

	Daventry	Northampton	South Northamptonshire	West Northamptonshire
Industrial	-586	-1,905	-440	-2,930
Warehousing	3,168	8,498	1,773	13,439
Office	2,176	17,017	2,620	21,813
B Space Jobs	4,757	23,611	3,954	32,322
Total Jobs	10,026	49,761	8,332	68,119

Table 6.20 – Jobs Distribution – West Northamptonshire 2001-2031

	Daventry	Northampton	South Northamptonshire	West Northamptonshire
Industrial	-703	-2,285	-527	-3,516
Warehousing	3,829	10,170	2,143	16,142
Office	2,629	20,364	3,167	26,160
B Space Jobs	5,755	28,248	4,783	38,786
Total Jobs	12,128	59,534	10,080	81,743

Table 6.21 – Floorspace Distribution – West Northamptonshire 2001-2026 (sq.m)

	Daventry	Northampton	South Northamptonshire	West Northamptonshire
Industrial	-20,510	-66,658	-15,383	-102,550
Warehousing	278,770	421,073	156,045	855,888
Office	65,234	306,312	87,922	459,468
Total Floorspace	323,494	660,727	228,585	1,212,806

Table 6.22 – Floorspace Distribution – West Northamptonshire 2001-2031 (sq.m)

	Daventry	Northampton	South Northamptonshire	West Northamptonshire
Industrial	-24,612	-79,989	-18,459	-123,060
Warehousing	336,919	501,520	188,627	1,027,066
Office	79,185	366,554	105,623	551,362
Total Floorspace	391,491	788,086	275,791	1,455,368

7. Current Property Market Conditions

Introduction

7.1 This Section provides a review of current property market conditions in Northamptonshire as of May 2009. An overview of national trends is provided firstly, which is followed by an assessment of both office and industrial / warehousing markets for each of the district / boroughs and main settlements in North and West Northamptonshire.

National Market

7.2 The UK economy deteriorated in the second half of 2008 amid turmoil in the financial market. Restricted bank lending has had a significant impact on the real economy with GDP having declined by 1.8% in 2008 with a further decline forecast for 2009.

7.3 The liquidity crisis has had a significant impact on both corporate investment and consumer spending. That, in turn, has resulted in occupiers and developers putting decisions on hold. With unemployment on a rising trend the outlook for growth in consumer spending remains bleak in the short-term, despite very low interest rates. That, combined with the falling house prices, as well as the decline in manufacturing output, will impact on demand for commercial and residential property in 2009.

Industrial and Distribution Markets

7.4 The industrial and distribution markets faired relatively better than either the office or retail markets during 2008. . Recent changes in the commercial market have reduced overall demand nationally and with changes in Government policy on business rates, it is likely that from now on there will be limited speculative development for warehouses and commercial premises in general nationally. Development companies are therefore having to look carefully at how they can deliver strategic warehouse opportunities and are now designing modular buildings that can be constructed relatively quickly to meet potential occupier demand as a result

7.5 Total take up for 2008 was just over 76,000,000 sq ft for the year. This is 2.6% lower than in 2007, reflecting the general economic slow down. The freehold market has suffered the greatest impact from the current economic climate. This has been the case right across the country with the number of freehold deals falling by 75% in some places.

7.6 Second-hand stock has seen reasonable take up in 2008, particularly in areas with an under supply of good – quality, modern space and where development options have become more limited.

7.7 Take up at the larger end of the scale has remained steady largely because, although there have been fewer transactions, the average size of units has been larger than in 2007. The wider distribution market has continued to see reasonable levels of demand and rents have remained static in most locations. Retailers and the third-party logistic operators continue to drive growth in this sector as distribution networks are refined in accordance with efficiency and sustainability objectives.

7.8 Overall, supply of industrial and distribution space has risen by approximately 7% in 2007, reflecting a fall in take up and more vacant space coming onto the market. Current availability stands at around 243,000,000 sq ft with new space now accounting for 31% or approximately 75,000,000 sq ft. The proportion of space under construction has fallen to 5% of total availability with approximately 12,000,000 sq ft of construction starts having been put on hold as a result of the “credit crunch” and the economic downturn. This has been partially offset by an increase in the number of design and build sites available, now an estimated 50,000,000 sq ft.

7.9 It is likely that new speculative schemes will be limited over the next year or so until the market picks up again.

7.10 In summary 2008 saw the market remain relatively in balance. The economic recession in 2009 is likely to impact on the market so we can, therefore, expect the market to see lower levels of demand and higher levels of supply.

Offices

7.11 A total of 13,000,000 sq ft was taken up in 2007. Occupier demand slowed down considerably in 2008 and take up was anticipated as being less than 9,000,000 sq ft with a similar figure likely to be achieved in 2009.

7.12 In mid 2008 there was some 23,700,000 sq ft on the market, representing a vacancy rate of 9.4%. With a vacancy rate of around 7% being indicative of a fairly balanced market, our analysis shows the regional markets to be slightly over supplied. In mid 2008 there was approximately 7,400,000 sq ft of speculative space under construction. This suggested that supply would increase by 31% over the next 2 years. Given the anticipated slowdown in occupier demand, this means that we expect the vacancy rate to rise to around 13% in the next 2 years.

7.13 With many consented schemes now on hold as a result of the credit squeeze and economy uncertainty, the risk of a 1990's over supply in the medium term has been somewhat mitigated. We can expect the market to begin to absorb the supply as demand strengthens from 2010 onwards.

7.14 With the detrimental effect of the empty property rates it is anticipated that speculative development will continue to be reduced significantly due to higher holding costs of vacant properties. Instead we can see the return of pre-lets as developers seek to minimise risk.

North Northamptonshire

7.15 As highlighted in previous sections of this report, North Northamptonshire is on the threshold of far reaching change through significant growth of population and employment in the area. The CSS, as taking forward by the East Midlands Plan, sets out the framework for development at the sub-regional level. The MKSM Strategy identifies four growth towns in Northamptonshire, in which the majority of development should be located, namely the towns of Corby, Kettering and Wellingborough, together with Northampton. The MKSM Strategy indicates that:

- Between 2001 – 21, the growth towns of Corby, Kettering and Wellingborough are to accommodate some 34,100 new dwellings and the remainder of North Northamptonshire a further 18,000 dwellings, out of a total of over 100,000 new dwellings for Northamptonshire as a whole;
- Over the same period, development should accommodate an increase in employment of some 47,400 jobs in North Northamptonshire; and
- In the longer term (2021 – 31) an indicative assumption is that the area should make provision for a further 28,000 additional dwellings.

7.16 There have been major changes over the last 18 months in the national, regional and local markets. The comments that follow relate to the perceptions of the land and property market in relation to the North Northamptonshire area.

OFFICE AND INDUSTRIAL MARKETS

Corby

7.17 Corby is an attractive location to the strategic distribution market.

7.18 Operators have committed to the first phases of Max Park and Eurohub. Developers also have committed to the speculative development of 525,000 sq ft warehouse at Arkwright Road and planning permission has been granted for some 278,700 sq m (3,000,000 sq ft) of industrial and warehousing space with a strategic rail freight link at Stanion Plantation.

7.19 However 2008 has witnessed deterioration in the B8 market and the outlook for at least the next 18 months is for further contraction marked by falling take up and declining rental values. Empty property rates will continue to prevent speculative development in the foreseeable future.

7.20 It is envisaged that quoting rentals will fall and the level of incentives offered increased in connection with terms being quoted on the built vacant stock. This will be consistent with the independent research figures by IPD which forecast that rents for distribution buildings will fall by 3.3% in 2009 and a further 1.3% in 2010.

7.21 Corby is well placed to meet the requirements of the strategic distribution market. However occupiers are continually focusing on prime sites. For large scale strategic distribution to be delivered in Corby significant infrastructure, including road and a major rail freight connection will need to be provided. Occupiers will be continuing to follow the recent national trend by seeking ever larger sites

7.22 Corby has a large manufacturing sector with proportionately more of the workforce employed in this sector than anywhere else in Northamptonshire. Historically, much of the demand for Corby has come from companies already occupying the 12,000,000 sq ft in the town. Corby has also historically benefited from high levels of Foreign Direct Investment, particularly from companies in the industrial markets. Further to this, over the last two years more than 50% of the demand has come from companies based outside of the town.

7.23 In 2008 available industrial / distribution floor space increased to around 2,250,000 sq ft. This is for existing stock.

7.24 Corby has the potential to offer a number of attractive development opportunities. Sites such as Cockerell Road (23 acres) and Southern Gateway (6 acres) are available and in Corby there are design and build opportunities available for in excess of 1,000,000 sq ft. Associated with the investment in the town centre a number town centre / edge of town centre sites are likely to become available over the next two years which would be attractive to a wide range of potential occupiers.

7.25 The take up in Corby in 2007 reached 1,000,000 sq ft, with the figures affected by several large-scale transactions such as the sale of Crackerjack of 525,000 sq ft and a unit of 275,000 sq ft on the Weldon North Industrial Estate. There were in excess of 60 deals.

7.26 In 2008 the total number of transactions was reduced by 50% with the total reduced significantly to below 350,000 sq ft. In contrast to the national trend and other North Northamptonshire towns there is a relatively high number of transactions between 10,000 – 40,000 sq ft. This is a reflection of the type of built stock in the town and nature of the businesses present.

7.27 Much of the built stock is of a poor quality and it will be important for the development sites to be serviced and immediately available being flexible to meet a wide range of occupier requests. A number of the development sites are potentially of a good quality.

7.28 The town has a relatively small office sector and currently limited potential for inward investing office occupiers. However, the first speculative office scheme for a number of years was completed in 2006 at The Headway Business Park. Units extending to 7,770 sq ft net internal have now been let on a 20 year lease to IDC United Kingdom Limited at a headline rental of

£15.25 per sq ft. Proposals are moving forward for the development of an Enterprise Centre scheme at Priors Hall on a site approaching two acres.

7.29 The overall offer of Corby has been significantly improved by the delivery of improved retail and civic facilities in the town centre. Land Securities (Willow Place) provides modern new shopping centre of 16,258 sq m (175,000 sq ft) of retail and restaurant floor space which opened in 2007. Phase 2 has a planning application submitted and will include department store, up to 340,000 sq ft of new retail floor space, new residential apartments and two new car parks providing up to 1,600 spaces.

7.30 Also in the town centre the Parklands Gateway scheme provides a performing arts centre, 500 seat theatre, Olympic sized swimming pool, civic suite and council chamber, and new library.

7.31 Construction started in July 2007 on the new £10.22 million station which opened in April 2009 linking the town with the railway network and London. Work is underway on developing a masterplan for the Corby Central Business Zone, which will provide a significant office and mixed development, linking the town centre and new station developments.

7.32 Table 7.1 sets out current rental and freehold values in Corby which are compared to those of recent years.

Table 7.1 – Office and Industrial Market Values - Corby

Corby	Rents per sq ft				Freehold per sq ft			
	2005	2006	2007	2008	2005	2006	2007	2008
Offices								
New Build	£12.00	£12.50	£14.00	£15.25	165	170	180	175
Second-hand	£6.00	£6.00	£6.50	£6.50	75	75	80	80
Industrial								
New Build	£5.00	£5.00	£5.50	£5.50	75	75	80	80
Second-hand	£3.25	£3.25	£3.50	£3.50	35	35	40	37

Kettering

7.33 Kettering's very close proximity to the A14 means that it is attractive to much of the industrial / strategic distribution market.

7.34 The industrial stock in Kettering extends to approaching 7,500,000 sq ft. Whilst availability has averaged over 800,000 sq ft it has largely comprised of a limited number of large buildings. Over recent years Kettering has had less than half the number of total deals compared to Wellingborough and Corby.

7.35 The most significant development has been at ProLogis Park which was granted planning permission for 204,300 sq m (2,200,000 sq ft) for distribution manufacturing and office space. Recent deals have included transactions to Specsavers, Bosch and Morrisons Supermarket. Only two units remain available, one of 125,000 sq ft and the other of 450,000 sq ft.

7.36 There have not only been shortages in the range of built stock available but also development land. However, planning permission has been granted on a 23 acre mixed use commercial site at Junction 8 of the A14 at the interchange with the A43.

7.37 Kettering continues to receive strong levels of demand and with greater availability there is the potential to secure significant inward investment.

7.38 The total office stock is approaching 900,000 sq ft. In 2007 availability was 86,860 sq ft and in 2008 this marginally increased to 95,689 sq ft. Much of the supply is within a small number of sites leading to strong competition between schemes.

7.39 Despite increased availability in 2008 take up reduced to 31,300 sq ft compared to 42,470 sq ft in 2007.

7.40 Over the last 15 years Kettering Venture Park extending to over 1,200,000 sq ft has nearly been fully developed, with it becoming an established office location albeit for mainly locally based companies. On the last two office developments a number of deals have been concluded. Kings Court comprises six units totalling 18,218 sq ft with units being sold at £200 per sq ft and quoting rental values of £15.50 per sq ft. The second phase will extend to up to 40,000 sq ft. Also on the Venture Park at Brooklands Court extending to a net area of 32,917 sq ft, seven units have now been sold with values achieved above £200 per sq ft. To the north of the town on the Weekley Wood Business Park there has been a land sale to Holiday Inn who are now constructing a new hotel facility and office deals at approximately £195 per sq ft are being achieved.

7.41 Table 7.2 sets out current rental and freehold values in Kettering which are compared to those of recent years.

Table 7.2 – Office and Industrial Market Values - Kettering

Kettering	Rents per sq ft				Freehold per sq ft			
	2005	2006	2007	2008	2005	2006	2007	2008
Offices								
New Build	£14.00	£14.00	£14.50	£15.50	180	190	200	195
Second-hand	£7.00	£7.00	£7.50	£7.00	80	80	85	85
Industrial								
New Build	£5.00	£5.00	£5.50	£5.50	80	80	90	85
Second-hand	£3.25	£3.25	£3.50	£3.50	45	50	55	50

Wellingborough

7.42 The industrial / warehouse stock in Wellingborough is over 12,000,000 sq ft with average availability over recent years in the region of 1,000,000 sq ft. Take up levels have been extremely healthy over the last few years averaging at over 1,000,000 sq ft largely as a result of the successful delivery in the marketplace of ProLogis Park. This was a speculative development of 1,100,000 sq ft comprising of three units, the last of which was let in 2008.

7.43 Whilst take up has been affected by the lettings at Prologis Park there have historically been good levels of actual transactions. Whilst the number of deals had fallen to 47 in 2008, in 2007 there were nearly 90 deals of which nearly 70 were for unit sizes of less than 10,000 sq ft. This is a reflection of the quality and size mix of the built stock.

7.44 This compares well with the national trend for some 75% of the total number of industrial deals being for unit sizes of less than 10,000 sq ft.

7.45 Extensive new industrial supply is proposed as part of the comprehensive plan to expand Wellingborough eastwards (WEAST) also known as Stanton Cross. The delivery of this supply however is contingent on major new road infrastructure linked in part to housing development and which will include new bridges and new junctions to the A45.

7.46 Wellingborough also has a railway station, which like Kettering does have direct services to London and has good road accessibility to A45 virtually defining the town southern boundary.

7.47 The current supply of offices in the town is limited with a stock of 900,000 sq ft and an availability in 2008 of 75,000 sq ft which had increased from 50,200 sq ft in 2007. Overall levels of occupation have been good reflecting a good mix in terms of the quality and size of the built stock. WEAST proposals are a major initiative to provide new office space adjoining Wellingborough station to the east together with residential expansion.

7.48 The proposals for up to 1,000,000 sq ft of offices centred around the station and indeed for sizeable development elsewhere in the town reflect the good rail links from Wellingborough to London. There is the opportunity for Wellingborough to attract inward office investment on a regional level but it would need to be linked with the significant infrastructure investment for the WEAST scheme as a whole.

7.49 Table 7.3 sets out current rental and freehold values in Kettering which are compared to those of recent years.

Table 7.3 – Office and Industrial Market Values - Wellingborough

Wellingborough	Rents per sq ft				Freehold per sq ft			
	2005	2006	2007	2008	2005	2006	2007	2008
Offices								
New Build	£14.00	£14.00	£14.50	£15.50	180	190	200	195
Second-hand	£7.00	£7.00	£7.50	£7.00	80	80	85	85
Industrial								
New Build	£5.00	£5.00	£5.50	£5.50	80	80	90	85
Second-hand	£3.25	£3.25	£3.50	£3.50	45	50	55	50

East Northamptonshire

7.50 East Northamptonshire is very different from the other Local Authorities in North Northamptonshire. It is characterised by a very dispersed settlement pattern, with population distributed among six main towns, of which Rushden and Higham Ferrers are the most significant.

7.51 Historically East Northamptonshire has been regarded as somewhat secondary for larger scale development. However it is traversed by the A45 and A14 and has come under increasing pressure for inward investment for strategic distribution, industry and to a lesser extent offices over recent years. The area has also witnessed strong growth in smaller scale rural development schemes.

7.52 Take up figures have been distorted by several large scale deals. At Thrapston, Frontier developed 151,123 sq ft of new distribution space speculatively which was let to Paperchase during construction and a headline rental of £4.75 per sq ft was achieved. At Warth Park, Raunds, deals have been completed to Hotpoint extending to 27,870 sq m (300,000 sq ft), 7,432 sq m (80,000 sq ft) to Rexsel, Robert Wiseman Diaries of 7,432 sq m (80,000 sq ft). More recently Hotpoint have extended their unit by a further 18,580 sq m (200,000 sq ft) and a large scale speculatively developed warehouse of 22,760 sq m (245,000 sq ft) was sold to Tesco's pension fund.

7.53 A number of large employment sites are currently being promoted in East Northamptonshire focussing on the strategic location of the area at the junction of the A45 and A14.

7.54 There is a number of mixed use town centre regeneration schemes considered in the district, which would support local employment growth.

7.55 Table 7.4 sets out current rental and freehold values in East Northamptonshire which are compared to those of recent years.

Table 7.4 – Office and Industrial Market Values – East Northamptonshire

East Northamptonshire	Rents per sq ft				Freehold per sq ft			
	2005	**2006**	**2007**	**2008**	**2005**	**2006**	**2007**	**2008**
Offices								
New Build	£12.00	£12.50	£14.00	£15.25	165	170	180	175
Second-hand	£6.00	£6.00	£6.50	£6.50	75	75	80	80
Industrial								
New Build	£5.00	£5.00	£5.50	£5.50	75	75	85	80
Second-hand	£3.25	£3.25	£3.50	£3.50	40	45	50	45

Retail

7.56 Each of these retail centres face substantial competition from major retail centres which are outside of North Northamptonshire. Many of these are receiving major investment, particularly Leicester and Peterborough to the north and Milton Keynes to the south and each of the local regional centres in North Northamptonshire is currently loosing retail spend to these centres.

7.57 There has been considerable pubic sector investment in North Northamptonshire's main town centres. Master plans are being prepared for Wellingborough and Kettering town centres to guide their future development and regeneration. The first phase of the town centre retail development for Corby has been undertaken and the next phases are being worked up by Land Securities.

7.58 It has been extensively reported that within the current economic market there have been a number of high profile failures amongst national retailers which together with the fall off in the secondary retail market has resulted in many void units in town centres throughout the country. That said there are some retailers who see the current market as an opportunity to acquire representation at a reasonable cost and they are making the most of the prevailing conditions. The affect on towns, even in the same region, can be very different.

7.59 Corby appears to be faring comparatively well with nearly 90% of Willow Place let and ongoing interest in the remainder. By comparison Kettering has not fared as well with an increasing number of void units in the town centre, although these are in the main older type properties on the high street which do not meet current retail requirements.

7.60 A recent Oxford Economics Study stated that out of 408 UK towns reviewed Corby was 'the British town least likely to feel the pain of the Credit Crunch,' reflecting the ongoing growth and broad spread of the local economy, with a ranking of 408 out of 408. Of the other towns in North Northamptonshire which were reviewed Kettering was ranked 262nd and Wellingborough 312th. This compares with Milton Keynes 10th; Northampton 41st; Peterborough 84th; Harborough 124th; Leicester 167th; Rugby 225th and Daventry 353$^{rd.}$

7.61 With the ongoing development of more housing in each of the towns in North Northamptonshire, particularly at the Growth Towns, the retail offer of each town will need to expand if it is to keep pace with the demand from new residents and so reduce the leakage of retail spend outside of the region. If this can be done then, notwithstanding the current economic uncertainties, the long term future would seem positive.

7.62 Table 7.5 summarises retail rental values in North Northamptonshire.

Table 7.5 – Retail Rental Values – North Northamptonshire 2006-2008

Summary of Retail – Rents (£ Zone A)			
	2006	2007	2008
Wellingborough	85	85	85
Corby	65	70	70
Kettering	80	85	85

Residential

7.63 There was a significant fall in transactions in 2008 compared with 2007. It has been widely reported that the main factor causing the falling house prices was the large amount of stock of property on estate agents books relative to the pool of available buyers rather than any surge in distressed selling.

7.64 The RICS and Council of Mortgage Lenders published their housing forecast for 2009 in January 2009 and the RICS predicted further falls of between 10% to 15% in 2009.

7.65 It is evident that sales in North Northamptonshire have dropped significantly in line with the rest of the UK over the last 12 – 18 months with all of the estate agents reporting a drop in demand of buyer enquiries.

7.66 Whilst the number of land sales in North Northamptonshire has been reduced during the first six months of 2008 there were still a number of completed land sales. During this period sales were continuing at strong values. At Little Stanion in Corby sales were achieved to Lagon Homes Ltd, Gladedale Homes, Taylor Wimpy and Bovis at values in excess of £1,000,000 per acre. Since the third quarter of 2008 the volume of land sales has reduced considerably with the major house builders having withdrawn from the market. Land sales proceeding have generally been largely affordable housing led at values in the region of £600,000 per acre.

7.67 The perceived strength of the North Northamptonshire location is evidenced by sites extending to over 18,000 houses being promoted on schemes such as Little Stanion, Priors Hall, Kettering East, WEAST, Upper Redhill and Eastfield Road.

7.68 The second quarter of 2009 has witnessed increased levels of interest from residential developers albeit largely on deferred payment terms. There are signs of a recovery in the residential market. All agents report increased levels of interest in April / May 2009 in terms of new enquiries and viewings of available houses. Offers being made are still unpredictable although generally reflect approximately 10% off the asking price. Approximate price per sq ft values as at second quarter 2009 across North Northamptonshire are identified in Table 7.6.

Table 7.6 – Residential Capital Values (£/Sq.ft 2nd Qtr 2009)

	1-2 Bed Apartment	2 Bed House	3 Bed House	4 Bed House
Corby	160 – 165	145	145	140
East Northamptonshire	170 – 175	165	165	160
Kettering	180 – 185	175	175	170
Wellingborough	170 – 175	165	165	160

West Northamptonshire

Northampton

7.69 As has been demonstrated in the report, West Northamptonshire has performed strongly in achieving employment growth, throughout the area, and is home to many world leading companies in a range of sectors.

7.70 Northampton is the main commercial centre of the county and increasing plays an important role in regional and national business activities. Northampton is designated as a Principal Urban Area within the East Midlands and it is widely accepted that it will act a regional centre, with the wider commercial leisure, retail and other services consummate with its role. This is to be further developed in line with the growth agenda across Northamptonshire to create a higher skill base which will impact on future supply.

7.71 In the Lambert Smith Hampton National Office Report 2008, Northampton was considered the Top Rated Office location nationally, due to the attractive mix of costs of accommodation, skilled labour supply, and strong market activity and growth aspirations.

7.72 As a result of wider economic uncertainty and turbulence in the financial markets in 2008 the market did experienced a slow down. Enquiry levels have dipped and the UK's economic performance will be the key determinant of occupier confidence and therefore demand. Any short term slow down in activity has to be put in context, given

7.73 In 2007 the office market witnessed strong activity although demand slowed towards the end of the year and take up was approximately 20,000 sq m, but the majority of demand was in space below 1,000 sq m. The take up in 2008 was down on the previous 12 months as a result of reduced demand and also reduced levels of stock. Freehold purchases had also previously accounted for a significant proportion of transactions and a lack of funding will hamper occupier activity.

7.74 Despite Northampton's strong position, the office market continues to remain short of supply, particularly in Northampton town centre, where availability of good quality space of 500 sq m to 1,000 sq m is almost non existent and comprises mostly of poorer quality secondary and refurbished space. Large scale high quality office stock is similarly extremely limited, though there are significant plans for major town centre office developments, supplying 10,000 sqm in the longer term. The main activity in the office market in Northampton is outside the town centre with prime office stock being located on key out of town schemes such as Waterside, Qubit and Swan Valley Court and smaller unit schemes like Queensbridge and Basset Court.

7.75 The "credit crunch" will clearly impact on new development decisions in the next few years, but longer term, more development is needed if the town is to compete successfully for inward investment and fulfil the objectives of the Milton Keynes and South Midlands strategy. There are a number of proposals in the development pipeline which should help increase occupier choice in the short term although the majority are located out of town.

7.76 On the Northampton industrial and warehouse market, take up during 2008 remains strong with a number of transactions completing on older properties due to the lack of available new buildings. Although the take up of buildings in 2008 was approximately 150,000 sq m, approximately 80% of the space transacted was spread across 8 buildings with the main key transaction being on Brackmills with the majority of other transactions being circa 10,000 sq m. The level of supply did improve with more new buildings becoming available at Pineham with the majority of this stock being large distribution warehouses. Until the credit crunch, there was a reasonable level of occupier demand, but commitments are currently slowing down with some developers yet to commit to commencing on site due to weaknesses in the current level of demand for space and the lack of funding available for purchasers.

7.77 The weakness in the investment market did lead to increased freehold activity but this has now petered out. The lack of funding in the market and the new empty business rate liability has led to less speculative development which is resulting in driving land values down from the peak in 2007.

7.78 When analysing the sites in Northampton, it is clear that there are a large number of existing allocated sites but these are generally small in size and the majority are not capable of undertaking major schemes. There is a need however to earmark a site which can deliver potential employment opportunities for the town and it may be that, in addition to key town centre sites, some of these maybe best located in other location within the wider Northampton Implementation Area

7.79 With regard to the supply of offices sites, then in the very centre of the town there are only limited small sites available and some of them due to land ownership issues will be complicated and slow to deliver. Castle Station is a prime example of a key office site, although it is located on the edge of the town centre rather than in the heart of the town, it does have the benefit of the rail connection but lacks the quantum of development that could possibly be undertaken that previously occurred. The St Johns, masterplan proposals would also provide a potential office location within the heart of the town, a scheme which as already received public sector support. The Waterside development also offers significant opportunities, though both sites require significant public sector intervention and may be regarded as longer term development priorities

7.80 Northampton has had limited success in recent years in attracting major office employers to the area and that there is a real need to improve the overall offer for Northampton in terms of both high quality B1 sites, In the Central Area, this offer should be extended to include retail, leisure and other facilities, to enable the Central Area to meet its future role as a city centre of regional importance, therefore attracting major headquarters style office buildings. A strong focus should be given to policies which will assist in delivering key regeneration initiatives within the Central Area, therefore increasing the supply of high quality schemes incorporating employment, retail, leisure and other town centre uses. This will support the Government's objectives outlined in draft PPS4, and the type of businesses and people that will assist in meeting the vision for West Northamptonshire in terms of a move towards higher value sectors of the economy.

7.81 Within the existing major commercial employment areas outside the Central Area, policies directing the strategic allocation of employment sites to meet job growth requirements set out in the MKSM SRS could include the need to consider offering opportunities for inward investment, through the provision of ancillary amenities required to serve the needs of the employees working within those areas. These policies should be effectively formulated so that these employment areas do not become a self contained destination in its own right and attract visitors who should be going to the town centre for retail, leisure and other related activities.

7.82 Table 7.7 sets out rental values for Northampton over recent years.

Table 7.7 – Office and Industrial Market Values - Northampton

Northampton	Rents per sq ft				Freehold per sq ft			
	2005	2006	2007	2008	2005	2006	2007	2008
Offices:								
New Build	16.00	16.00	17.00	17.00	215	220	220	225
Second Hand	13.00	13.00	13.00	12.50	140	145	145	150
Industrial/ Warehouses:								
New Build	5.50	5.75	6.00	5.50	75	85	95	90
Second Hand	4.50	4.50	4.50	4.00	40	50	60	45

Daventry

7.83 Daventry has grown over a number of years from a small market town and across the region has developed a reputation for distribution warehouses, The close proximity of Daventry to the M1, M6 Interchange and the A14 means that it is located close to the heart of the distribution motorway network and the influence of the Working Time Directive and the tacograph mean that this is a strategically important location for businesses to move to. It allows commercial vehicles to deliver and return on a daily basis to a wide section of the country from a central base covering the North West and Manchester, the north east, East Coast ports, London and the South Coast, as well as South Wales, all of which can be commuted to and back to Daventry on a daily basis.

7.84 As a result, Daventry has grown significantly in the strategic distribution market from the earliest facility developed by Fords in the 1970's providing the largest single storey warehouse in the UK and this has been supplemented by further development in the town and more recently at Junction 18 DIRFT (Daventry International Rail Freight Terminal) which also has rail links for movement of commercial freight.

7.85 For the last few years, the supply of available zoned and serviced employment land has been at an all time low as a result of growth earlier in the planned cycle where opportunities were identified. Growth immediately took place, resulting in restrictions in the future growth of the area due to the lack of supply whilst demand remained high for strategic distribution sites. This has resulted in growth in some of the less favourable locations away from the M1/M6 Interchange in other areas around the country and across the county. These would not necessarily have gone ahead if a supply of available serviced land for strategic distribution had been available at that time in the Daventry area.

7.86 Recent changes in the commercial market have reduced overall demand nationally and with changes in Government policy on business rates, it is likely that from now on there will be limited speculative development for warehouses and commercial premises in general nationally. Development companies are therefore having to look carefully at how they can deliver strategic warehouse opportunities and are now designing modular buildings that can be constructed relatively quickly to meet potential occupier demand as a result.

7.87 Currently there is only a limited supply of immediately available large strategic warehouses empty across the district which is a testament to the popularity of the area. It should also be noted that whilst strategic distribution has taken place with a large proportion being developed at DIRFT, the actual jobs created at DIRFT do not relate purely to the district and it is estimated that 80% of the workforce working at DIRFT come from outside the area, in Rugby and Leicestershire. This potential distortion in the employment figures needs to be taken into consideration in the overall current and future assessment of existing and future strategic distribution in this location.

7.88 It is anticipated that future occupiers of buildings which invariably are distribution logistics companies serving in particular the supermarket and retail chains, will continue to look at the cost scenario and the length of contracts that they are able to secure. This which will provide a challenge to developers of these strategic warehouses from an investment point of view due to potential reductions in lease lengths that the logistics companies are able to secure. As a result of the restriction in the supply of serviced land with planning consent, there has been very limited supply of new warehouse buildings in the district in the last 3 years with only the last two new warehouse buildings being completed on DIRFT Phase 1 in this timescale. The DIRFT phase 2 expansion which provides up to 200,000sqm of B8 floorspace will also provide for new short term development opportunities in the district.

7.89 Through the historic and diverse employment base for Daventry, the B2 sector for manufacturing has remained resilient with specialist companies thriving and able to grow and expand in the area, enabling a small growth in manufacturing B2 employment in the area against a falling national trend.

7.90 The development of the office sector for Daventry however remains a challenge, as the town is relatively small in size and does not have a wide base of historic office employment. The town also has limited rail facilities available at Rugby, Long Buckby and Northampton.

7.91 The majority of office employment has resulted in small local companies locating in the area and in recent developments, some professional services have moved out of the town centre to the main area of new offices on the Heartlands Business Park at Drayton Fields. The example of the Heartlands Business Park and the initial phase of development should be considered History shows that despite providing a large area of fully serviced and landscape Business Park designed for office development with a central water feature, over a period of 8 to 9 years, despite heavy promotion, the development was unable to secure an occupier for office development.. The widening of the planning policies for the Heartlands Business Park enabled the area to be developed and the Business Park to move forward and attract a number of investors in a range of sectors.

7.92 Similarly to many urban areas, the town must therefore improve its wider offering in order to attract new office businesses to this location. . Activities, such as the I Hub, Abbey Retail Park and wider town centre development may support this desire..

7.93 Table 7.8 sets out rental values for Daventry over recent years.

Table 7.8 – Office and Industrial Market Values - Daventry

Daventry	**Rents per sq ft**				**Freehold per sq ft**			
	2005	**2006**	**2007**	**2008**	**2005**	**2006**	**2007**	**2008**
Offices								
New Build	12.00	12.00	12.50	12.00	160	165	165	150
Second Hand	7.50	8.00	9.00	7.50	130	135	130	125
Industrial/ Warehouses								
New Build	4.75	4.75	5.00	4.75	80	85	90	85
Second Hand	4.00	4.00	4.25	4.00	65	65	70	65

South Northamptonshire

7.94 South Northamptonshire has two major towns providing employment in the district at Towcester and Brackley with the other major employment area in the district being Grange Park which generally serves Northampton. Emerging plans highlight Silverstone Circuit for employment land expansion, though the majority of this growth is located in Buckinghamshire Whilst Towcester is the administrative centre for South Northamptonshire, the employment base for the town is relatively small with a high level of out commuting to Northampton, Milton Keynes or the surrounding area. The town had a historic base of high tech engineering and electronics and it is those companies who remain in Towcester, which were the spin off from the original businesses developed in the town, make up the large proportion of the manufacturing base for Towcester and Caswell.

7.95 The other employment town for the district is at Brackley with a substantial employment area located to the south of the town with a diverse base of manufacturing, small warehousing businesses located in this area. The size of the buildings is relatively small as the majority of the estate had been developed prior to the completion of the A43 dual carriageway and the allocations of land were relatively small, thus preventing the development of strategic distribution in this location. The town also has the benefit of motor sport technology as a spin off from Silverstone. This is a significant factor in the potential growth for the South Northamptonshire area if the motor sport and motor industry sector can be encouraged to grow in the current difficult economic climate, generating a centre of excellence based around the countries worldwide reputation for motor sport.

7.96 In terms of strategic warehousing in the South Northamptonshire district area, then the main location for this type of development is at Grange Park, Junction 15 of the M1. The main area of strategic warehousing has already been developed with limited development still available.,.

7.97 In terms of the county providing an important strategic location for a headquarters style building in a prominent motorway location adjacent to residential and potential growth of employment in the south east quadrant of the town beyond the existing Grange Park area, then this site does provide a key opportunity for the town and it may be worth considering in the overall policies of the county as one of the few immediately available large sites capable of taking headquarters manufacturing to serve the town as part of an overall county wide strategy.

7.98 In respect of the provision of office space within the district, then the aspiration as is common with most local authorities, is to encourage and develop the office and B1 space, but the area does not have an immediate base of office employment which is capable of expansion..

7.99 Table 7.9 sets out rental values for South Northamptonshire over recent years.

Table 7.9 – Office and Industrial Market Values – South Northamptonshire

South Northamptonshire	Rents per sq ft				Freehold per sq ft			
	2005	**2006**	**2007**	**2008**	**2005**	**2006**	**2007**	**2008**
Offices:								
New Build	14.50	15.00	16.00	16.50	180	185	195	195
Second Hand	10.50	11.00	12.00	12.00	135	140	150	145
Industrial/ Warehouses:								
New Build	5.00	5.00	5.50	5.00	80	85	90	85
Second Hand	4.25	4.25	4.50	4.00	65	65	70	65

Investment Yields

7.100 Table 7.10 sets out current investment yields in the county (prime and secondary). These are broadly applicable to key employment areas throughout North and West Northamptonshire.

Table 7.10 – Prevailing Investment Yields in Northamptonshire

	Prime	Secondary
Industrial	7.5%	10%
Warehousing	7.5%	10%
Offices	7.25%	9.5%
Retail:		
In town	6%	9%
Out of town	6.75%	10%

8. Supply Assessment

Introduction

8.1 This section provides a comprehensive review of the existing and potential supply of land which may be suitable for employment development within the County. The results of the review provide the basis upon which to consider how the future supply requirements can meet the anticipated demand and enable a basis from which to identify sites for potential allocation and broad strategic directions for employment growth.

8.2 Particular consideration is given to the quality of existing allocations and proposed (unallocated) sites and their potential to make a genuine and effective contribution to meeting the established employment growth targets in Northamptonshire.

8.3 In addition to the sites put forward by the local authorities and JPUs, the study also undertook a 'Call for Sites' process where stakeholders including land owners and developers were openly requested to send through details of land that they would consider developing for employment uses. This an assessment of sites which in some cases had not, at the time of the study, come forward within the planning process as yet, and enabled the study to look at as wide a range of potential sites as possible.

8.4 The SELA takes a strategic approach to assessing the future needs for employment land and jobs growth. The SELA does not replace local Employment Land Reviews (ELRS), but rather seeks to support the strategic policy direction for the planning process in Northamptonshire. Local Planning Authorities should undertake detailed ELRs, taking into consideration the findings and recommendations of the SELA and emerging planning policy.

8.5 In light of the strategic policy requirement for Northamptonshire to support significant employment growth, it is recommended that unless there is a clear requirement for existing employment land allocations to be lost, sites should not be released for alternative uses. Where existing employment sites are promoted for transfer to other uses, this should be supported by comprehensive evidence indicating that the need for development of alternative uses significantly outweighs existing and future employment needs.

8.6 Appendix D provides a series of figures which illustrate the location of each of the sites assessed.

8.7 Table 8.1 illustrates that 222 sites were identified by the consultants which were subject to a comprehensive site appraisal. The greatest number of sites was identified within South Northamptonshire (43 sites in total). Kettering has the greatest amount of land, in terms of total area, which was subject to the assessment process. In total, over 3,500ha of land was assessed as part of this study.

8.8 The site area shown is total gross area of employment land proposed. Sites may form part of wider mixed use plans: it is only the area with potential for employment development that is measured and assessed. Similarly, it should be noted that where a site was identified as a potential Sustainable Urban Extension, only the gross employment area of the masterplan, and not the wider area taken up by other uses, was counted in the analysis.

8.9 Site assessments within the SELA do not prejudice future decisions to be undertaken by the planning authorities in relation to preferred directions of growth, site identification in DPDs or in the determination of planning applications.

8.10 Promoters of the sites identified in this document for 'next stage evaluation' should be aware that their inclusion does not imply that they have been accepted in terms of the ability of the Strategic Road Network (SRN) to accommodate trips generated by proposed sites. In particular, a number of sites will have a direct impact on the SRN and this will need to be fully investigated. Any site coming forward will require full supporting evidence, in particular a Transport Assessment and

Travel Plan produced in compliance with the latest standard, currently DFT Circular 02/2007, Guidance on Transport Assessment and the “Good Practice Guidelines: Delivering travel plans through the planning system”. In order to ensure that sites are taken through the planning process in a timely and efficient manner, promoters should seek early engagement with the relevant statutory agencies. This should include all strategic partners including the Highways Agency, Environment Agency, English Heritage and others to ensure that the detailed requirements of these bodies are fully considered as part of the formal planning process.

8.11 It is recognised that this report provides a ‘snapshot in time’ and that additional sites may come forward which have not been considered in the study. These sites should be fully assessed in accordance with the criteria utilised in this study as well the policy and development control requirements of relevant local planning authorities. Subject to a reasonable degree of certainty of such sites being implemented, it may be necessary to take these into consideration when updating the supply estimates set out in this report. .

Table 8.1 – Summary of Employment Land Assessed by Local Authority

	Total Sites		Total Site Area	
	No.	%	No.	%
Corby	24.0	10.8	419.8	11.8
East Northamptonshire	29.0	13.1	321.0	9.0
Kettering	39.0	17.6	752.3	21.1
Wellingborough	17.0	7.7	605.2	16.9
South Northamptonshire	43.0	19.4	584.2	16.4
Northampton	37.0	16.7	192.0	5.4
Daventry	33.0	14.9	696.6	19.5
North Northamptonshire	109.0	49.1	2098.3	58.8
West Northamptonshire	113.0	50.9	1472.8	41.2
Total	222.0	100.0	3571.1	100.0

Appraisal Methodology

8.12 In order to provide a comprehensive and consistent site appraisal, sites were assessed on 55 different attributes. The attributes and criteria were developed in consultation with the JPUs and are in line with employment land review guidance. The criteria were agreed at the beginning of the site assessment process to ensure consistency and to make the assessment as objective as possible.

8.13 The attributes were separated into nine categories as shown below:

- Base Information - including the size of the site, vacant plots, current use and any existing planning permissions.
- Quality of the Existing Plot – including existing uses, existing parking, servicing and circulation and the state of the external areas and public realm.
- The Quality of the Wider Environment – including adjacent land uses, the perception of the wider environmental quality and local facilities and amenities for the labour force
- Strategic Access – including ease of access to the main road network and potential for rail freight.

- Ownership – including the number of freehold and leasehold owners, ransom strips and other known ownership constraints.
- Site Development Constraints – including topography, size, profile, utilities, environmental constraints, contamination, land stability and the amenity of adjacent occupiers.
- Local Accessibility – including ease of access by public transport and the quality of the local labour force.
- Sequential Test and Brownfield – including whether the site was on the urban edge, outside the urban area or within the urban area, greenfield or brownfield, net effect of floodplain and the quality of any agricultural land that could be lost.
- Market Conditions and Demand – including the supply and demand for various types of uses, recent market activity on the site, likely availability of the site and likely market demand for any proposed / possible uses on the site.

8.14 It is recognised that particular employment uses require different types of business environments. For example, a site which would be expected to accommodate office uses as part of wider business park would require a higher quality external environment, as well as differing access and parking arrangements, compared to general industrial uses. The site assessment process ensured that the attributes of each site were recorded and scored appropriately according to its current and potential future employment role.

8.15 'Bad Neighbour' issues have been considered through the appraisal process. This includes activities that may reduce the attractiveness or quality of neighbouring uses, such as residential. This is balanced against wider planning policy priorities to develop mixed use schemes which minimise the need to travel. Conversely, there may be the potential to locate some relatively high-impact industries in locations in order to maximise clustering and agglomeration effects. For example, waste management and recycling facilities and strategic distribution centres. Where appropriate the SELA makes recommendations regarding these potential clusters.

8.16 The site assessments were undertaken by two experienced independent surveyors in order to ensure consistency across all sites. The assessment is primarily focused on a market assessment and broad planning and sustainability principles. Detailed planning considerations will need to be considered if and when sites are progressed through the planning process. As such, site scores in isolation should not be considered as an indication of sites suitability for planning permission. Further information gathered from each local authority and via the Request for Sites process supplemented the information gathered from the site visits.

8.17 Using the above information, each site was then given a score for the following broad categories:

- Likelihood to come forward for employment development up to 2031. This score (out of 5, with 5 being the highest) is derived by looking at the current, and potential, future market demand for employment uses on each site, the existence of current constraints, as well as their severity, and the existence of other sites which may be better suited to come forward for employment uses beforehand. It should be noted that a site can been recorded as relatively unconstrained, but the likelihood of it coming forward may not be as high as 5. This is because the market demand for the site in its current format may be relatively low or because the owner may not be keen to push forward the site for employment development at the current time. Conversely, there is the possibility of public sector interventions having the potential to change current constraints markedly over time.
- Sustainability Score. This score (using the traffic light method of green – meaning highly sustainable, yellow, meaning generally sustainable and red, meaning unsustainable) was derived using the following method:

- If the site was located within the central area of a key settlement (of at least a rural service centre or above), the site was given a high sustainability score. If the site was on the edge of a key settlement, but was within 15 minutes walk of a railway station, the site was given a high sustainability score.
- If the site was located on the edge of a key settlement (of at least a rural service centre or above), or had access to reasonably frequent bus links, the site was given a medium sustainability score.
- If the site was largely outside of a key settlement, with no access to public transport links, the site was given a low sustainability score
- The scores were also adjusted upwards if development could take place on a largely brownfield location or downwards if the site was largely Greenfield. The score was also adjusted if the site had the potential to link into the national rail network for freight distribution.

- Commercial Suitability Score. This score (again using the traffic light method of green – meaning likely high demand from a market perspective, yellow, meaning fair demand and red, meaning low demand) is derived using an analysis of the location of each site, it's links to the wider highway network, the general site environment, access for HGV's, the existence of any proposals for the site, other developer interest and the likely potential demand for future employment uses on each site.
- Overall Quality. This score (again using the traffic light method of green – meaning high quality, yellow, meaning fair quality and red, low quality) is derived as a composite score of the commercial suitability and sustainability scores. Sites identified as high quality were either highly sustainable and at least fairly suitable from a market perspective or fairly sustainable and highly suitable from a market perspective. Fair quality sites scored fairly in at least either the sustainability or market perspective scores, whilst poor quality sites usually scored poor for both.

8.18 The analysis of known constraints at each site has been presented according to the following categories:

- No Known Constraints. The site has no serious constraints to employment development that are known to the study team
- Ownership and Site Assembly. The site may be under several ownerships which may impede the development of a wider employment proposal on the site.
- Land Contamination / Ground Stability Issues. The site has known issues related to land contamination or ground stability which require remediation before employment development can take place
- Awaiting Delivery of other Sites. The site is awaiting the development of other employment sites, usually for reasons related to infrastructure, before employment development can take place on the site.
- Local Infrastructure Constraints. The site requires a significant amount of work to ensure that it is connected to the wider highway network or to utilities and services networks
- Wider Infrastructure Constraints. The site is reliant on the development of a new road link, major junction upgrade or other major infrastructure project not specifically related solely to the site

- Planning Constraints. A site was considered to be constrained in planning terms if the site is not identified as allocated for employment uses or the site has no existing planning permissions specifically related to employment uses. Some local authorities have begun to specify potential locations for employment development as part of their emerging LDF process..Where a site is idenified in an exiting Local Plan, emergent Joint Core Strategy or has an existing approval, the site is considered for the purposes of this study as unconstrained in planning terms. Where this is not the case, sites are considered constrained. It is recognised that these documents are, in some cases, over 10 years old, and that this may not reflect emerging policy priorities. However, in the absence of any LDF documents which state otherwise, the Local Plans represent the only approved documents which set out local authorities intentions for particular sites at the current time. It should also be noted that there may be site specific planning issues which may need to be resolved before development can take place. These issues are outside the scope of this study and have not been taken account of in the analysis.
- Dependent upon Delivery of Wider Scheme. The employment component is only likely to be delivered if the wider scheme of which it forms a part (usually residential) is developed.
- Other. This may include, for example, constraints relating to the relocation of existing businesses and other constraints which are not covered above.

8.19 Each site was also given a likely timeframe for delivery of employment uses. Every site received a timeframe score, regardless of whether or not the employment component was particularly likely to come forward in the period up to 2031.

Results by Local Authority

8.20 In addition to sites assessed as part of this study, it is recognised that there is also a potential further ‘pipeline’ of floorspace that currently may be being considered through the planning process including approvals that have been decided by committees, but have not yet been implemented. Partners should continue to work on effective monitoring activities to reconcile this data with the supply estimates provided in the SELA. The quantum of this potential supply is likely to vary significantly between local authorities. By way of example, Appendix H sets out planning approvals data produced by WNDC for the West Northamptonshire Urban Development Area is highlighted in Appendix H. It will be essential that thorough ongoing monitoring captures the scale and quality of this potential development. Subject to a reasonable degree of certainty regarding the likelihood of such proposals being implemented, it may be necessary to take these into consideration when updating the supply estimates set out in this report.

8.21 The overall summaries of the potential supply of employment land are presented in the sub-sections below. These provide an overview of the amount of land which may have potential to accommodate employment uses, the known constraints on each site, the likelihood of coming forward within the plan period, the sustainability of each site and the commercial suitability and viability of each site. The following tables represent the key issues from the site specific assessments. Full details of each site assessment are contained in a database labelled Appendix E.

Corby

8.22 Table 8.2 illustrates that a total of 419.8ha of land was assessed in Corby, of which just 17% was considered to be largely free from development constraints.

Table 8.2 – Constrained / Unconstrained Land Assessed in Corby

	Ha	%
Constrained Land	346.7	82.6
Land with No Serious Constraints	73.1	17.4
Total	419.8	100.0

8.23 Table 8.3 illustrates that just seven sites in Corby are not subject to serious known constraints, whilst the remaining 17 are subject to a range of constraints. Two of Corby's largest areas for employment development, at C6 and C7, which form the Stanion Plantation site, are subject to wider infrastructure constraints, including the potential need for improved highway infrastructure.

Table 8.3 –Constrained Sites - Corby

		Area for Employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
C5	Willowbrook North (Car Storage Site)	25.9		X	X						
C6	Stanion Plantation	60.0						X			
C7	Land at Geddington Road (Stanion)	125.0				X		X	X		
C10	Corby Community College Site	4.0					X				
C14	Site Bangrave Road	1.9			X			X			
C15	Land west of Corby (Urban Extension)	12.0						X		X	
C 16	Princewood Road	1.6			X						
C17	Seymour Plantation	11.0			X						
C21	Gretton Brook Road, Corby	40.0					X		X		
C 23	Soot Hills	9.6								X	
C 24	Science Park	11.1									X
C25	Land at Ironpit Close, Geddington Road, Corby	0.4					X				
C27	Oakley Hay	1.3			X						X
C29	Land East of Weldon	0.9					X			X	
C30	Former Tarmac Land	8.6			X		X				
C31	Barn Close	28.0			X		X				
C32	Ex Sludge Beds	5.5			X		X				
C1	Priors Hall	5.8	X								
C2	North of Birchlington Road	36.3	X								
C4	Cockerell Road	9.3	X								
C9	Southern Gateway	2.9	X								
C11	Land at Centrix Park	13.8	X								
C12	Site Genner Road	2.0	X								
C26	Parkland Gateway	2.8	X								

8.24 Table 8.4 illustrates the total amount of land assessed in Corby which is specifically constrained by planning issues. The table demonstrates that, although the majority of land (60.7%) is not subject to known planning constraints, and has therefore been made available through the planning process, much of that land is subject to wider (generally physical) constraints.

Table 8.4 – Land Subject to Planning Constraints - Corby

	Land (ha)	%
Land Without Planning Constraints	**254.8**	**60.7**
Subject to Other Constraints	181.7	43.3
Unconstrained	73.1	17.4
Land with Planning Constraints	**165.0**	**39.3**
Also Subject to Other Constraints	165.0	39.3
No Additional Constraints	0.0	0.0
Total	**419.8**	**100.0**

8.25 Table 8.5 illustrates the likelihood of each site coming forward for employment development up to 2031. A score of 5 means that the site is very likely to come forward whilst a score of 3 means that some doubts remain. A score of 1 or 2 mean that the site is probably unlikely to come forward for employment development up to 2031. Again, it should be noted that a site can been recorded as relatively unconstrained, but the likelihood of it coming forward may not be as high a 5 (see above). Table 8.6 provides a summary of the amount of land available by the likelihood of it coming forward.

8.26 The tables demonstrate that just five sites have scores of 3.5 or higher in Corby, which total approximately 21ha. Most sites score around 3, which mean they may come forward for development but some doubts on the market demand and existing constraints remain.

Table 8.5 – Likelihood of Site coming forward Score

		Total area for employment (ha)	Likelihood of site coming forward for employment
C4	Cockerell Road	9.3	5
C9	Southern Gateway	2.9	5
C26	Parkland Gateway	2.8	5
C12	Site Genner Road	2.0	4
C10	Corby Community College Site	4.0	3.5
C1	Priors Hall	5.8	3
C2	North of Birchlington Road	36.3	3
C6	Stanion Plantation	60.0	3
C11	Land at Centrix Park	13.8	3
C 23	Soot Hills	9.6	3
C25	Land at Ironpit Close, Geddington Road, Corby	0.4	3
C5	Willowbrook North (Car Storage Site)	25.9	2.5
C7	Land at Geddington Road (Stanion)	125.0	2.5

C14	Site Bangrave Road	1.9	2.5
C21	Gretton Brook Road, Corby	40.0	2.5
C 16	Princewood Road	1.6	2
C17	Seymour Plantation	11.0	2
C27	Oakley Hay	1.3	2
C29	Land East of Weldon	0.9	2
C30	Former Tarmac Land	8.6	2
C31	Barn Close	28.0	2
C32	Ex Sludge Beds	5.5	2
C15	Land west of Corby (Urban Extension)	12.0	1.5
C 24	Science Park	11.1	1

Table 8.6 – Likelihood of Site Coming Forward Score

Score	Sites	Land	%
Above 4	3	15.0	3.6
Above 3 -4	2	6.0	1.4
Above 2 -3	10	318.9	76.0
Above 1 - 2	8	68.9	16.4
0-1	1	11.1	2.6
Total	24	419.8	100.0

8.27 Table 8.7 illustrates the sustainability and commercial suitability scores which make up the overall quality scores of each site. The table shows that eight sites were considered to be within the high sustainability category, whilst one site is considered as poor in sustainability terms. C21 was considered to be poor in sustainability terms due to its Greenfield location and the fact that it is only accessible by car. A further three sites were considered to be strong in market terms. In total, eight sites were considered to be of high quality overall, with a total land area of 61.1ha.

Table 8.7 – Quality Scoring for Corby Sites

		Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
C12	Site Genner Road	2			
C26	Parkland Gateway	2.8			
C5	Willowbrook North (Car Storage Site)	25.9			
C10	Corby Community College Site	4.0			
C11	Land at Centrix Park	13.8			

C14	Site Bangrave Road	1.9			
C 23	Soot Hills	9.6			
C4	Cockerell Road	9.3			
C9	Southern Gateway	2.9			
C27	Oakley Hay	1.3			
C1	Priors Hall	5.8			
C2	North of Birchlington Road	36.3			
C6	Stanion Plantation	60			
C7	Land at Geddington Road (Stanion)	125			
C25	Land at Ironpit Close, Geddington Road, Corby	0.4			
C15	Land west of Corby (Urban Extension)	12			
C 16	Princewood Road	1.6			
C17	Seymour Plantation	11			
C 24	Science Park	11.1			
C29	Land East of Weldon	0.9			
C30	Former Tarmac Land	8.6			
C31	Barn Close	28			
C32	Ex Sludge Beds	5.5			
C21	Gretton Brook Road, Corby	40			

8.28 Table 8.8 illustrates the total amount of land assessed according to planning constraints and the overall quality of the site (as identified within Table 8.7). The table shows that the majority of the land which is unconstrained in planning terms is of fair/poor quality. However, all of the land assessed as high quality is unconstrained in planning terms.

Table 8.8 – Planning Constraints / Quality Analysis - Corby

	Land (ha)	%
Land Without Planning Constraints	**254.8**	**60.7**
Of High Quality	73.4	17.5
Of Fair/Poor Quality	181.4	43.2
Land with Planning Constraints	**165.0**	**39.3**
Of High Quality	0.0	0.0
Of Fair/Poor Quality	165.0	39.3
Total	**419.8**	**100.0**

8.29 Table 8.9 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that just 7.3% of all land assessed (30.8ha) is unconstrained and of high quality. The vast majority of all land assessed (72.4%) was considered to be constrained in of fair/poor quality.

Table 8.9 – Overall Constraints / Quality Analysis - Corby

	Land (ha)	%
Constrained Land	**346.7**	**82.6**
Of High Quality	42.6	10.2
Of Fair / Poor Quality	304.1	72.4
Unconstrained Land	**73.1**	**17.4**
Of High Quality	30.8	7.3
Of Fair / Poor Quality	42.3	10.1
Total	**419.8**	**100.0**

8.30 Table 8.10 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time), whilst Table 8.11 provides a summary of the amount of land available according to the estimated timeframe.

8.31 The tables demonstrate that Corby has around 67ha of land (16%) which could come forward straight away, although the vast majority would take a number of years to be delivered.

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Table 8.10 – Potential Timeframe for Delivery – Corby Sites

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
C2	North of Birchlington Road	36.3	X					
C4	Cockerell Road	9.3	X					
C9	Southern Gateway	2.9	X					
C11	Land at Centrix Park	13.8	X					
C12	Site Genner Road	2	X					
C26	Parkland Gateway	2.8	X					
C1	Priors Hall	5.8		X				
C6	Stanion Plantation	60		X				
C14	Site Bangrave Road	1.9		X				
C 16	Princewood Road	1.6		X				
C5	Willowbrook North (Car Storage Site)	25.9			X			
C10	Corby Community College Site	4.0			X			
C17	Seymour Plantation	11			X			
C 23	Soot Hills	9.6			X			
C 24	Science Park	11.1			X			
C25	Land at Ironpit Close, Geddington Road, Corby	0.4			X			
C29	Land East of Weldon	0.9			X			
C7	Land at Geddington Road (Stanion)	125				X		
C21	Gretton Brook Road, Corby	40				X		
C30	Former Tarmac Land	8.6				X		
C31	Barn Close	28				X		
C32	Ex Sludge Beds	5.5				X		
C15	Land west of Corby (Urban Extension)	12						X
C27	Oakley Hay	1.3						X

Table 8.11 – Summary of Timeframe for Delivery – Corby Sites

Timeframe for Delivery	Area (ha)	%
Immediate	67.1	16.0
Within 1 year	69.5	16.5
1-3 years	62.9	15.0
4-6 years	207.1	49.3
7-10 years	0.0	0.0
10+ years	13.3	3.2
Total	419.8	100.0

Corby Summary

8.32 Corby has a relatively large amount of land (420ha) which may be suitable for employment development up to 2031. However, the vast majority of this land is currently constrained by a large number of factors.

8.33 There are a number of sites which are considered to be able to come forward to accommodate employment development relatively quickly including Cockerell Road and the Southern Gateway, both of which scored 5 on the likelihood for employment development score and both of which are considered to be of high quality overall. Although neither of these sites scored highly within the sustainability assessment, they are considered to have strong market demand. However, neither of these sites are particularly large (they total 12ha together) and do not represent a significant reserve of good quality employment land within the Borough.

8.34 The Borough has a number of other sites which would be able to meet long-term demand, including Stanion Plantation. However, these constraints will probably not impede the development of general industrial employment uses within the Borough in the long-term and the amount and quality of employment land available should be sufficient to support employment growth within this particular sector without the need to identify further sites in addition to those considered as part of this assessment. However, Corby does not have many sites which could accommodate high quality office-based uses, whilst sites suitable for distribution uses are relatively constrained.

East Northamptonshire

8.35 Table 8.12 illustrates that a total of 321ha of land was assessed in East Northamptonshire, of which just 2.5% was considered to be largely free from development constraints.

Table 8.12 – Constrained / Unconstrained land in East Northamptonshire

	Land (Ha)	%
Constrained Land	313.1	97.5
Land with No Serious Constraints	7.9	2.5
Total	321.0	100.0

8.36 Table 8.13 illustrates that just two sites, E24 in Thrapston and E30 at Kings Cliffe Industrial Estate, in East Northamptonshire is not subject to serious known constraints, whilst the remaining 27 are subject to a range of constraints.

Table 8.13 – East Northamptonshire Sites by Known Constraints

Site Id	Site Name	Area for Employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
E24	Plot 2 A1 / M1 Link, Thrapston	2.0	X								
E30	Kings Cliffe Industrial Estate	5.9	X								
E 10	Alfred Street Junior School, Rushden	0.7									X
E 1	Rectory Farm, Islington (Thrapston)	15.1					X		X		X
E 2	Warth Park, Raunds	33.5					X	X	X		
E 3	Land to North and Northeast of Raunds	26.0					X			X	
E 4	Equilibrium' Rushden Lakes (West of Rushden Lakes)	14.0					X				X
E 5	Kettering Road, Islip	23.0			X		X		X		
E 6	Land to the east of the A605, Thrapston Bypass	49.8					X		X		
E 7	Northampton Road, Rushden	6.1					X		X		
E 8	East Road, Oundle	1.0					X				
E 9	Splash Leisure Pool, Rushden	0.8									X
E 11	Land at Cosy Nook and rear of High Street Properties , Thrapston	1.0		X						X	
E 12	Cattle Market, Thrapston	1.0		X			X			X	
E 13	Bull Ring and Church Walk, Thrapston	0.2		X						X	X
E 14	Duck Street Car Park, Rushden	0.7							X	X	X
E 15	High Street, Thrapston	1.0		X						X	X
E 16	Manor Park, Rushden	10.0							X		
E17	Nene Park, Irthlingborough	20.3			X		X				
E 18	Newton Road Car Park and Recycling Centre, Rushden	0.9								X	X
E 19	Pemberton Centre, Rushden	2.2							X		X
E20	Land off Titchmarsh Lane, Thrapston	5.0				X	X		X		
E21	Land South of A14 and East of A45, Thrapston	22.0					X		X		
E23	Scotts, Bridge Street, Thrapston	2.5									X

E25	Rockingham Motor Speedway	40.5					X		X		
E26	Spanhoe Airfield	9.8						X	X		
E27	Nene Valley Farm	12.0					X		X		
E28	Brigstock Camp	4.0					X		X		
E29	Deenethorpe Airfield	10.0					X		X	X	

8.37 Table 8.14 illustrates the total amount of land assessed in East Northamptonshire which is specifically constrained by planning issues. The table demonstrates that the majority of land assessed as part of the study (75.9%) is subject to planning constraints, and that the vast majority of the land which is not constrained by planning issues is subject to other constraints.

Table 8.14 – Land Subject to Planning Constraints – East Northamptonshire

	Land (ha)	%
Land Without Planning Constraints	**77.3**	**24.1**
Subject to Other Constraints	69.4	21.6
Unconstrained	7.9	2.5
Land with Planning Constraints	**243.7**	**75.9**
Also Subject to Other Constraints	233.7	72.8
No Additional Constraints	10.0	3.1
Total	**321.0**	**100.0**

8.38 Table 8.15 illustrates the likelihood of each site coming forward for employment development up to 2031. Table 8.13 provides a summary of the amount of land available by the likelihood of it coming forward.

8.39 The tables demonstrate that nearly 21% of land in East Northamptonshire (66.6ha) scores 3.5 or above, which means it is relatively likely to come forward to 2031 for employment uses.

8.40 Many of the sites identified within town centre redevelopment schemes have been scored relatively low due to the difficulties faced in overcoming ownership constraints.

Table 8.15 – Likelihood of Site Coming Forward Score – East Northamptonshire

Site Ref No.	Site Name	Total area for employment (ha)	Likelihood of site coming forward for employment
E24	Plot 2 A1 / M1 Link, Thrapston	2.0	5
E 2	Warth Park, Raunds	33.5	4
E 3	Land to North and Northeast of Raunds	26.0	4
E 7	Northampton Road, Rushden	6.1	4
E 8	East Road, Oundle	1.0	4
E 5	Kettering Road, Islip	23.0	3
E17	Nene Park, Irthlingborough	20.3	3
E23	Scotts, Bridge Street, Thrapston	2.5	3

E25	Rockingham Motor Speedway	40.5	3
E27	Nene Valley Farm	12.0	3
E30	Kings Cliffe Industrial Estate	5.9	3
E 1	Rectory Farm¸ Islington (Thrapston)	15.1	2.5
E 6	Land to the east of the A605, Thrapston Bypass	49.8	2.5
E 16	Manor Park, Rushden	10.0	2.5
E20	Land off Titchmarsh Lane, Thrapston	5.0	2.5
E 18	Newton Road Car Park and Recycling Centre, Rushden	0.9	2
E28	Brigstock Camp	4.0	2
E29	Deenethorpe Airfield	10.0	2
E 4	Equilibrium' Rushden Lakes (West of Rushden Lakes)	14.0	1.5
E 9	Splash Leisure Pool¸ Rushden	0.8	1.5
E 10	Alfred Street Junior School, Rushden	0.7	1.5
E 11	Land at Cosy Nook and rear of High Street Properties, Thrapston	1.0	1.5
E 12	Cattle Market, Thrapston	1.0	1.5
E 13	Bull Ring and Church Walk, Thrapston	0.2	1.5
E 14	Duck Street Car Park, Rushden	0.7	1.5
E 15	High Street, Thrapston	1.0	1.5
E 19	Pemberton Centre, Rushden	2.2	1.5
E21	Land South of A14 and East of A45, Thrapston	22.0	1.5
E26	Spanhoe Airfield	9.8	1.5

Table 8.16 – Sites According to Likelihood of coming forward – East Northamptonshire

Score	Sites	Land (ha)	%
Above 4	1	2.0	0.6
Above 3 -4	4	66.6	20.7
Above 2 -3	10	184.1	57.3
Above 1 - 2	14	68.3	21.3
0-1	0	0.0	0.0
Total	29	321.0	100.0

8.41 Table 8.17 illustrates that eleven sites were considered to be within the high sustainability category, whilst three sites are considered as poor in sustainability terms. The eleven sites included within the high sustainability category include mostly all of the sites proposed as part of town centre redevelopment schemes. Three rural sites were assessed as poor in sustainability terms. The table also demonstrates that five sites are considered to have high market demand for employment development. As a result, 16 sites were considered to be of high quality overall, which cover a total land area of 130ha.

Table 8.17 – Quality Scores – East Northamptonshire

Site Ref No.	Site Name	Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
E23	Scotts, Bridge Street, Thrapston	2.5			
E 8	East Road, Oundle	1.0			
E 9	Splash Leisure Pool	0.8			
E 10	Alfred Street Junior School, Rushden	0.7			
E 11	Land at Cosy Nook and rear of High Street Properties , Thrapston	1.0			
E 12	Cattle Market, Thrapston	1.0			
E 13	Bull Ring and Church Walk, Thrapston	0.2			
E 14	Duck Street Car Park, Rushden	0.7			
E 15	High Street, Thrapston	1.0			
E 18	Newton Road Car Park and Recycling Centre, Rushden	0.9			
E 19	Pemberton Centre, Rushden	2.2			
E 2	Warth Park, Raunds	33.5			
E 3	Land to North and Northeast of Raunds	26.0			
E 7	Northampton Road, Rushden	6.1			
E25	Rockingham Motor Speedway	40.5			
E27	Nene Valley Farm	12.0			
E 1	Rectory Farm, Islington (Thrapston)	15.1			
E 6	Land to the east of the A605, Thrapston Bypass	49.8			
E 16	Manor Park, Rushden	10.0			
E17	Nene Park, Irthlingborough	20.3			
E20	Land off Titchmarsh Lane, Thrapston	5.0			
E24	Plot 2 A1 / M1 Link, Thrapston	2.0			
E 4	Equilibrium' Rushden Lakes (West of Rushden Lakes)	14.0			
E30	Kings Cliffe Industrial Estate	5.9			
E 5	Kettering Road, Islip	23.0			
E21	Land South of A14 and East of A45 , Thrapston	22.0			
E26	Spanhoe Airfield	9.8			
E28	Brigstock Camp	4.0			
E29	Deenethorpe Airfield	10.0			

8.42 Table 8.18 illustrates the total amount of land assessed according to planning constraints and the overall quality of the site (as identified within Table 8.17). The table shows that just 10.9% (35.1ha) of the total land assessed is not subject to planning constraints and is of high quality.

Table 8.18 – Planning Constraints / Quality Analysis – East Northamptonshire

	Land (ha)	%
Land Without Planning Constraints	**77.3**	**24.1**
Of High Quality	35.1	10.9
Of Fair/Poor Quality	42.2	13.1
Land with Planning Constraints	**243.7**	**75.9**
Of High Quality	95.0	29.6
Of Fair/Poor Quality	79.9	24.9
Total	**321.0**	**100.0**

8.43 Table 8.19 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that no land was identified which is of high quality and is currently unconstrained, whilst just 2.5% (7.9ha) of all land assessed (22.2ha) is unconstrained but of low quality. This suggests that East Northamptonshire may have difficulty in delivering employment growth in the short terms unless constraints at particular sites can be resolved.

Table 8.19 – Overall Constraints / Quality Analysis – East Northamptonshire

	Land (ha)	%
Constrained Land	**313.1**	**97.5**
Of High Quality	130.1	40.5
Of Fair / Poor Quality	183.0	57.0
Unconstrained Land	**7.9**	**2.5**
Of High Quality	0.0	0.0
Of Fair / Poor Quality	7.9	2.5
Total	**321.0**	**100.0**

8.44 Table 8.20 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time), whilst Table 8.21 provides a summary of the amount of land available according to the estimated timeframe.

8.45 The tables demonstrate that East Northamptonshire has only 2ha which could come forward straight away, although around three quarters could be delivered in up to three years (depending on market demand).

Table 8.20 – Potential Timescale for Delivery – East Northamptonshire

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
E24	Plot 2 A1 / M1 Link, Thrapston	2.0	X					
E 8	East Road, Oundle	1.0		X				
E 16	Manor Park, Rushden	10.0		X				
E26	Spanhoe Airfield	9.8		X				
E30	Kings Cliffe Industrial Estate	5.9		X				
E 2	Warth Park, Raunds	33.5			X			
E 3	Land to North and Northeast of Raunds	26.0			X			
E 5	Kettering Road, Islip	23.0			X			
E 6	Land to the east of the A605, Thrapston Bypass	49.8			X			
E 7	Northampton Road, Rushden	6.1			X			
E 9	Splash Leisure Pool, Rushden	0.8			X			
E 10	Alfred Street Junior School¸ Rushden	0.7			X			
E 14	Duck Street Car Park, Rushden	0.7			X			
E17	Nene Park, Irthlingborough	20.3			X			
E 18	Newton Road Car Park and Recycling Centre, Rushden	0.9			X			
E20	Land off Titchmarsh Lane, Thrapston	5.0			X			
E23	Scotts, Bridge Street, Thrapston	2.5			X			
E25	Rockingham Motor Speedway	40.5			X			
E27	Nene Valley Farm	12.0			X			
E28	Brigstock Camp	4.0			X			
E 1	Rectory Farm, Islington (Thrapston)	15.1				X		
E 4	Equilibrium' Rushden Lakes (West of Rushden Lakes)	14.0				X		
E 11	Land at Cosy Nook and rear of High Street Properties, Thrapston	1.0				X		
E 12	Cattle Market, Thrapston	1.0				X		
E 13	Bull Ring and Church Walk, Thrapston	0.2				X		
E 15	High Street, Thrapston	1.0				X		
E 19	Pemberton Centre, Rushden	2.2				X		
E21	Land South of A14 and East of A45, Thrapston	22.0				X		
E29	Deenethorpe Airfield	10.0				X		

Table 8.21 – Summary of Potential Timescale for Delivery – East Northamptonshire

Timeframe for Delivery	Land (ha)	%
Immediate	2.0	0.6
Within 1 year	26.7	8.3
1-3 years	225.8	70.3
4-6 years	66.5	20.7
7-10 years	0.0	0.0
10+ years	0.0	0.0
Total	321.0	100.0

East Northamptonshire Summary

8.46 East Northamptonshire has around 321ha of existing and potential (currently unallocated) land which may be suitable for employment development up to 2031. However, it is estimated that around 73% of this land is constrained by a variety of factors.

8.47 Although a majority of the land is considered to be unconstrained in physical terms, and that there is a high level of market interest in the land, it is expected that much of it will not come forward for a number of years. This is due to the fact that two sites in particular, at Warth Park and the land to the north of Raunds, do not yet have planning permission and work is expected to start within 5-10 years.

8.48 The District has a number of sites located around the major urban areas, including a range of sites at Thrapston, and Rushden. The A45 provides good access to Northampton and to the A14, and it is expected that most of the opportunities will come forward on sites close to this key link. Many of the potential opportunities assessed are located within the town centres, although these are considered to be highly constrained due to their multiple ownerships and are only likely to provide a relatively small, if important, amount of employment floorspace.

8.49 The only very large scale site in East Northamptonshire, at Rushden Lakes, appears to be constrained by the costs associated with infrastructure. However, the sites at Raunds and at Thrapston have the potential to fill this gap in the medium term.

Kettering

8.50 Table 8.22 illustrates that a total of 752.3ha of land was assessed in Kettering, of which just 5.6% was considered to be largely free from development constraints.

Table 8.22 – Constrained / Unconstrained Land - Kettering

	Land (Ha)	%
Constrained Land	715.8	95.1
Land with No Serious Constraints	36.5	4.9
Total	752.3	100.0

8.51 Table 8.23 illustrates that 5 sites in Kettering are not subject to serious known constraints, whilst the remaining 34 are subject to a range of constraints. However, many of the sites without constraints are very small compared to the sites with constraints. Two of Kettering's largest areas for employment development, Kettering South and the Land Adjacent to A510 at Burton Wold, are subject to wider infrastructure constraints, including the need to connect to the existing highway infrastructure and the need to overcome locational constraints (in the case of the site at A510).

Table 8.23 – Kettering Sites by Constraints

Site Ref No.	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
K 6	Cransley Park	13.0	X								
K 8	Kettering Business Park	15.0	X								
K34	Station Quarter, Kettering	5.0	X								
K36	Stanier Close, Kettering	2.5	X								
K37	Gladstone Street and Harborough Road, Desborough	1.0	X								
K 31	Magnetic Park	6.0	X								
K 1	Kettering South	110.0					X	X	X		
K 2	McAlpine, Pytchley Lodge Industrial Estate	11.0				X	X				
K3	Broughton Grange	0.5					X	X	X		
K4	West Kettering (adjacent to Broughton Grange)	10.1					X	X	X		
K5	Land to the North and South of the A43 Northampton Road, Broughton Nr. Kettering	25.0			X		X		X		
K 7	Kettering Hub	15.0					X		X		
K 9	Weekley Wood Development Area	40.0				X	X		X		
K 10	Kettering East	20.2					X	X		X	
K11	Land to the south of Higham Road and west of the A6 Burton Latimer, Nr Kettering	7.5					X		X		
K 12	Blackridge Farm, Burton Latimer, Kettering, Northants	4.3					X		X		X
K 13	Land adjacent to A6 Burton Latimer, Kettering, Northamptonshire	8.0					X		X		
K14	Land adjoining the A6, Burton Latimer, Nr. Kettering	32.6							X		
K 15	Kettering Road, Broughton	0.8					X		X		X
K16	Dukes Mill Farm	0.5							X		
K 17	Slipton Lane Barns	0.4							X		
K 18	Geddington West	2.0							X		
K 19	Geddington South	0.5							X		

K 20	Stamford Road, Geddington	2.9							X		
K 21	The Saw Mill, Geddington	0.9							X		
K 22	Weekley Builders Yard (described as woodyard in Kettering Borough Councils Conservation Area Review)	0.3							X		
K 24	Land adjacent to A510 Burton Wold, Northants	100.0					X		X	X	
K 25	Storefield	15.2					X	X	X		
K 26	South East of J3 of the A14, Kettering	8.1					X		X		
K27	Land at Harrington Road, Rothwell, Nr Kettering	5.2							X		
K28	Land adjoining Kettering Road, Rothwell	15.9					X		X		
K 29	Rothwell North 7ha	7.0					X		X		
K 30	Rothwell North 4ha	4.0							X	X	
K 32	Desborough northwest and adjacent land	40.0					X		X		
K33	Land adjoining Braybrooke Road, Desborough	14.8					X		X		
K35	Former Bus Depot	0.2							X		
K 38	Corby Southeast	10.0						X	X	X	
K39	Desborough Airfield	121.0					X		X		
K 40	Oakley Hay West	76.0					X		X	X	

8.52 Table 8.24 illustrates the total amount of land assessed in Kettering which is specifically constrained by planning issues. The table demonstrates that the majority of land assessed as part of the study (90.2%) is subject to planning constraints, whilst the vast majority (84.2% or 633ha) is subject to planning and other physical constraints.

Table 8.24 – Land Subject to Planning Constraints - Kettering

	Land (ha)	%
Land Without Planning Constraints	**73.7**	**9.8**
Subject to Other Constraints	31.2	4.2
Unconstrained	42.5	5.6
Land with Planning Constraints	**678.5**	**90.2**
Also Subject to Other Constraints	633.2	84.2
No Additional Constraints	45.4	6.0
Total	**752.3**	**100.0**

8.53 Table 8.25 illustrates the likelihood of each site coming forward for employment development up to 2031. Table 8.21 provides a summary of the amount of land available by the likelihood of it coming forward.

8.54 The tables demonstrate that just 4.5% of land in Kettering (34ha) scores 3.5 or above, which means it is relatively likely to come forward to 2031 for employment uses.

8.55 Many of the large sites identified are subject to constraints related to highways and junction improvements and so have been scored relatively low in terms of their likelihood to come forward for employment development.

Table 8.25 – Likelihood of Site Coming Forward Score

Site Ref No.	Site Name	Total area for employment (ha)	Liklihood of site coming forward for employment
K 6	Cransley Park	13.0	5
K 8	Kettering Business Park	15.0	5
K 31	Magnetic Park	6.0	5
K 1	Kettering South	110.0	3
K 7	Kettering Hub	15.0	3
K14	Land adjoining the A6, Burton Latimer, Nr. Kettering	32.6	3
K 25	Storefield	15.2	3
K 30	Rothwell North 4ha	4.0	3
K 32	Desborough northwest and adjacent land	40.0	3
K34	Station Quarter, Kettering	5.0	3
K4	West Kettering (adjacent to Broughton Grange)	10.1	2.5
K5	Land to the North and South of the A43 Northampton Road, Broughton Nr. Kettering	25.0	2.5
K 9	Weekley Wood Development Area	40.0	2.5
K 10	Kettering East	20.2	2.5
K 20	Stamford Road, Geddington	2.9	2.5
K 26	South East of J3 of the A14, Kettering	8.1	2.5
K28	Land adjoining Kettering Road, Rothwell	15.9	2.5
K35	Former Bus Depot	0.2	2.5
K36	Stanier Close, Kettering	2.5	2.5
K 40	Oakley Hay West	76.0	2.5
K 2	McAlpine, Pytchley Lodge Industrial Estate	11.0	2
K11	Land to the south of Higham Road and west of the A6 Burton Latimer, Nr Kettering	7.5	2
K 12	Blackridge Farm, Burton Latimer, Kettering, Northants	4.3	2
K 13	Land adjacent to A6 Burton Latimer, Kettering, Northamptonshire	8.0	2
K16	Dukes Mill Farm	0.5	2
K 17	Slipton Lane Barns	0.4	2
K 18	Geddington West	2.0	2
K 19	Geddington South	0.5	2
K 21	The Saw Mill, Geddington	0.9	2
K 22	Weekley Builders Yard (described as woodyard in Kettering Borough Councils Conservation Area Review)	0.3	2
K 24	Land adjacent to A510 Burton Wold, Northants	100.0	2

K27	Land at Harrington Road, Rothwell, Nr Kettering	5.2	2
K 29	Rothwell North 7ha	7.0	2
K33	Land adjoining Braybrooke Road, Desborough	14.8	2
K37	Gladstone Street and Harborough Road, Desborough	1.0	2
K 38	Corby Southeast	10.0	2
K39	Desborough Airfield	121.0	2
K3	Broughton Grange	0.5	1.5
K 15	Kettering Road, Broughton	0.8	1.5

Table 8.26 – Summary of Likelihood of Site coming Forward Score

Score	Sites	Land (ha)	%
Above 4	3	34.0	4.5
Above 3 -4	0	0.0	0.0
Above 2 -3	17	422.7	56.2
Above 1 - 2	19	295.6	39.3
0-1	0	0.0	0.0
Total	39	752.3	100.0

8.56 Table 8.27 illustrates that four sites were considered to be within the high sustainability category, whilst 17 sites are considered as poor in sustainability terms. The 17 sites considered to be poor in sustainability terms are all small, largely rural, sites. Overall, 10 sites are considered to be good quality, whilst 17 sites are considered to be poor quality.

Table 8.27 – Quality Scores - Kettering

Site Ref No.	Site Name	Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
K34	Station Quarter, Kettering	5.0			
K35	Former Bus Depot	0.2			
K36	Stanier Close, Kettering	2.5			
K37	Gladstone Street and Harborough Road, Desborough	1.0			
K 1	Kettering South	110.0			
K 6	Cransley Park	13.0			
K 7	Kettering Hub	15.0			
K 8	Kettering Business Park	15.0			
K14	Land adjoining the A6, Burton Latimer, Nr. Kettering	32.6			
K 31	Magnetic Park	6.0			
K 2	McAlpine, Pytchley Lodge Industrial Estate	11.0			

K4	West Kettering (adjacent to Broughton Grange)	10.1			
K5	Land to the North and South of the A43 Northampton Road, Broughton Nr. Kettering	25.0			
K 9	Weekley Wood Development Area	40.0			
K 10	Kettering East	20.2			
K 12	Blackridge Farm, Burton Latimer, Kettering, Northants	4.3			
K 29	Rothwell North 7ha	7.0			
K 30	Rothwell North 4ha	4.0			
K 32	Desborough northwest and adjacent land	40.0			
K33	Land adjoining Braybrooke Road, Desborough	14.8			
K 38	Corby Southeast	10.0			
K 40	Oakley Hay West	76.0			
K 13	Land adjacent to A6 Burton Latimer, Kettering, Northamptonshire	8.0			
K 25	Storefield	15.2			
K 26	South East of J3 of the A14, Kettering	8.1			
K3	Broughton Grange	0.5			
K11	Land to the south of Higham Road and west of the A6 Burton Latimer, Nr Kettering	7.5			
K 15	Kettering Road, Broughton	0.8			
K16	Dukes Mill Farm	0.5			
K 17	Slipton Lane Barns	0.4			
K 18	Geddington West	2.0			
K 19	Geddington South	0.5			
K 20	Stamford Road, Geddington	2.9			
K 21	The Saw Mill, Geddington	0.9			
K 22	Weekley Builders Yard (described as woodyard in Kettering Borough Councils Conservation Area Review)	0.3			
K 24	Land adjacent to A510 Burton Wold, Northants	100.0			
K27	Land at Harrington Road, Rothwell, Nr Kettering	5.2			
K28	Land adjoining Kettering Road, Rothwell	15.9			
K39	Desborough Airfield	121.0			

8.57 Table 8.28 illustrates the total amount of land assessed according to planning constraints and the overall quality of the site (as identified within Table 8.27). The table shows that just 5.6% (42.5ha) of the total land assessed is not subject to planning constraints and is of high quality.

Table 8.28 – Planning Constraints / Quality Analysis – Kettering

	Land (ha)	%
Land Without Planning Constraints	**73.7**	**9.8**
Of High Quality	42.5	5.6
Of Fair/Poor Quality	31.2	4.2
Land with Planning Constraints	**678.5**	**90.2**
Of High Quality	157.8	21.0
Of Fair/Poor Quality	520.7	69.2
Total	**752.3**	**100.0**

8.58 Table 8.29 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that all of the land identified as unconstrained is also considered to be of high quality, although this represents a small amount of the total amount of land surveyed (5.6% or 42.5ha).

Table 8.29 – Overall Constraints / Quality Analysis - Kettering

	Land (ha)	%
Constrained Land	**709.8**	**94.4**
Of High Quality	157.8	21.0
Of Fair / Poor Quality	552.0	73.4
Unconstrained Land	**42.5**	**5.6**
Of High Quality	42.5	5.6
Of Fair / Poor Quality	0.0	0.0
Total	**752.3**	**100.0**

8.59 Table 8.30 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time), whilst Table 8.25 provides a summary of the amount of land available according to the estimated timeframe.

8.60 The tables demonstrate that Kettering has only 36.5ha (4.9%) which could come forward straight away, with the majority (52.3%) not available until at least 4 years.

Table 8.30 – Potential Timeframe for Delivery - Kettering

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
K 6	Cransley Park	13.0	X					
K 8	Kettering Business Park	15.0	X					
K 31	Magnetic Park	6.0	X					
K36	Stanier Close, Kettering	2.5	X					
K 2	McAlpine, Pytchley Lodge Industrial Estate	11.0			X			
K3	Broughton Grange	0.5			X			
K 9	Weekley Wood Development Area	40.0			X			
K 10	Kettering East	20.2			X			
K11	Land to the south of Higham Road and west of the A6 Burton Latimer, Nr Kettering	7.5			X			
K 13	Land adjacent to A6 Burton Latimer, Kettering, Northamptonshire	8.0			X			
K14	Land adjoining the A6, Burton Latimer, Nr. Kettering	32.6			X			
K 15	Kettering Road, Broughton	0.8			X			
K16	Dukes Mill Farm	0.5			X			
K 17	Slipton Lane Barns	0.4			X			
K 18	Geddington West	2.0			X			
K 19	Geddington South	0.5			X			
K 20	Stamford Road, Geddington	2.9			X			
K 21	The Saw Mill, Geddington	0.9			X			
K 22	Weekley Builders Yard (described as woodyard in Kettering Borough Councils Conservation Area Review)	0.3			X			
K 24	Land adjacent to A510 Burton Wold, Northants	100.0			X			
K 26	South East of J3 of the A14, Kettering	8.1			X			
K27	Land at Harrington Road, Rothwell, Nr Kettering	5.2			X			
K28	Land adjoining Kettering Road, Rothwell	15.9			X			
K 30	Rothwell North 4ha	4.0			X			
K 32	Desborough northwest and adjacent land	40.0			X			
K33	Land adjoining Braybrooke Road, Desborough	14.8			X			
K34	Station Quarter, Kettering	5.0			X			
K35	Former Bus Depot	0.2			X			
K37	Gladstone Street and Harborough Road, Desborough	1.0			X			
K 7	Kettering Hub	15.0				X		
K 1	Kettering South	110.0				X		

K 25	Storefield	15.2				X		
K 29	Rothwell North 7ha	7.0				X		
K 38	Corby Southeast	10.0				X		
K39	Desborough Airfield	121.0				X		
K 40	Oakley Hay West	76.0				X		
K4	West Kettering (adjacent to Broughton Grange)	10.1						X
K5	Land to the North and South of the A43 Northampton Road, Broughton Nr. Kettering	25.0						X
K 12	Blackridge Farm, Burton Latimer, Kettering, Northants	4.3						X

Table 8.31 – Summary of Timeframe for Delivery - Kettering

Timeframe for Delivery	Land (ha)	%
Immediate	36.5	4.9
Within 1 year	0.0	0.0
1-3 years	322.2	42.8
4-6 years	354.2	47.1
7-10 years	0.0	0.0
10+ years	39.4	5.2
Total	752.3	100.0

Kettering Summary

8.61 Kettering has around 752ha of land which may be suitable for employment development up to 2031. However, it is estimated that around 95% of this land is constrained by a variety of factors.

8.62 Kettering has a number of sites which are considered to be highly suitable from a market demand perspective, most of which are located around junctions 7 to 10 of the A14. Locations around the A14 have been some of the most desirable in North Northamptonshire and this is expected to continue. However, mostly all of these sites have considerable constraints in terms of their potential access onto the A14 itself. Many sites would need junction improvements which would be expensive, or are awaiting the delivery of other key road links, such as the new link proposed from Wellingborough to Kettering.

8.63 As a result, much of the land is not expected to come forward in the immediate/short term, although it does appear to have significant potential in the longer term.

8.64 Other sites exist in the smaller town of Desborough and at a number of rural locations. There are also opportunities for employment development within Kettering town Centre which could support a large amount of high quality office floorspace.

8.65 It would seem that no further land would be required in addition to that assessed as part of this study in order to allow the town to support growth. However, there may need to be intervention to ensure that the good quality sites available are actually brought forward to meet demand.

Wellingborough

8.66 Table 8.32 illustrates that a total of 605ha of land was assessed in Wellingborough, of which just 5.2% was considered to be largely free from development constraints.

Table 8.32 – Constrained / Unconstrained Land

	Land (Ha)	%
Constrained Land	573.7	94.8
Land with No Serious Constraints	31.5	5.2
Total	605.2	100.0

8.67 Table 8.33 illustrates that six sites in Wellingborough are not subject to serious known constraints, whilst the remaining eleven are subject to a range of constraints. All of the larger sites have been assessed as subject to some kind of constraints, which means that Wellingborough's ability to deliver strategic growth may be impaired unless action is taken to resolve those constraints.

Table 8.33 – Wellingborough Sites by Constraints

Site Ref No.	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
3W	Harrowden Court	2.2	X								
4W	Central Park	2.3	X								
5W	Sanders Business Park	1.3	X								
6W	Upper Redhill	10.5	X								
10W	Sywell Aerodrome	5.5	X								
15W	Ogee Business Park	9.7	X								
W1	Stanton Cross	46.7						X		X	
2W	Land East of Stanton Cross	32.3				X		X	X	X	
7W	Ecton Estate	7.5							X	X	
8W	Land at Doddington Road, Wollaston	3.8			X		X		X		
9W	Side Gate Works	0.6					X			X	
11W	Sywell Grange	43.0					X				
12W	Water Garden	1.2					X			X	
13W	Wilby Grange	16.2					X	X	X		
14W	Appleby Lodge	65.3					X	X	X		
16W	Pulse Park	152.0					X	X	X		
17W	Southwest Rushden	205.0					X	X	X		

8.68 Table 8.34 illustrates the total amount of land assessed in Wellingborough which is specifically constrained by planning issues. The table demonstrates that the majority of land assessed as part of the study (79.7% or 482ha) is subject to planning constraints, whilst all of this land is also subject to other physical constraints.

Table 8.34 – Land Subject to Planning Constraints - Wellingborough

	Land (ha)	%
Land Without Planning Constraints	**123.0**	**20.3**
Subject to Other Constraints	91.5	15.1
Unconstrained	31.5	5.2
Land with Planning Constraints	**482.1**	**79.7**
Also Subject to Other Constraints	482.1	79.7
No Additional Constraints	0.0	0.0
Total	**605.2**	**100.0**

8.69 Table 8.35 illustrates the likelihood of each site coming forward for employment development up to 2031. Table 8.36 provides a summary of the amount of land available by the likelihood of it coming forward.

8.70 The tables demonstrate that just 16% of land in Wellingborough (97ha) scores 3.5 or above, which means it is relatively likely to come forward to 2031 for employment uses.

8.71 Many of the large sites identified are subject to constraints related to highways and junction improvements, as well as constraints related to their need to be developed as part of a wider residential scheme, and so have been scored relatively low in terms of their likelihood to come forward for employment development.

Table 8.35 – Likelihood of Site coming Forward Score - Wellingborough

Site Ref No.	Site Name	Total area for employment (ha)	Likelihood of site coming forward for employment
3W	Harrowden Court	2.2	5
4W	Central Park	2.3	5
5W	Sanders Business Park	1.3	5
15W	Ogee Business Park	9.7	5
13W	Wilby Grange	16.2	4
14W	Appleby Lodge	65.3	4
6W	Upper Redhill	10.5	3
10W	Sywell Aerodrome	5.5	3
W1	Stanton Cross	46.7	2.5
11W	Sywell Grange	43.0	2.5
8W	Land at Doddington Road, Wollaston	3.8	2
9W	Side Gate Works	0.6	2
12W	Water Garden	1.2	2
16W	Pulse Park	152.0	2
17W	Southwest Rushden	205.0	1.5
2W	Land East of Stanton Cross	32.3	1
7W	Ecton Estate	7.5	1

Table 8.36 – Summary of Likelihood of Sites coming forward Score

Score	Sites	Land	%
Above 4	4	15.5	2.6
Above 3 -4	2	81.5	13.5
Above 2 -3	4	105.7	17.5
Above 1 - 2	5	362.6	59.9
0-1	2	39.8	6.6
Total	17	605.2	100.0

8.72 Table 8.37 illustrates that only one site was considered to be within the high sustainability category, at Stanton Cross, largely because the remaining sites are on the urban edge rather than within the central area, whilst 8 sites are considered as poor in sustainability terms. Stanton Cross was given a high sustainability score due to its location close to the station and its ability to provide employment close to the proposed residential community. In total, six sites were considered to be of high quality whilst nine sites were considered to be poor.

Table 8.37 – Quality Scores - Wellingborough

Site Ref No.	Site Name	Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
W1	Stanton Cross	46.7			
3W	Harrowden Court	2.2			
4W	Central Park	2.3			
5W	Sanders Business Park	1.3			
13W	Wilby Grange	16.2			
14W	Appleby Lodge	65.3			
15W	Ogee Business Park	9.7			
6W	Upper Redhill	10.5			
7W	Ecton Estate	7.5			
10W	Sywell Aerodrome	5.5			
11W	Sywell Grange	43.0			
16W	Pulse Park	152.0			
17W	Southwest Rushden	205.0			
2W	Land East of Stanton Cross	32.3			
8W	Land at Doddington Road, Wollaston	3.8			
9W	Side Gate Works	0.6			
12W	Water Garden	1.2			

8.73 Table 8.38 illustrates that the total amount of land assessed according to known planning constraints and the overall quality of the site (as identified within Table 8.37). The table shows that just 10.3% (62.2ha) of the total land assessed is not subject to planning constraints and is of high quality.

Table 8.38 – Planning Constraints / Quality Analysis - Wellingborough

	Land (ha)	%
Land Without Planning Constraints	**123.0**	**20.3**
Of High Quality	62.2	10.3
Of Fair/Poor Quality	60.8	10.0
Land with Planning Constraints	**482.1**	**79.7**
Of High Quality	81.5	13.5
Of Fair/Poor Quality	400.6	66.2
Total	**605.2**	**100.0**

8.74 Table 8.39 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that around half of the land identified as unconstrained is also considered to be of high quality, although this represents a small amount of the total amount of land surveyed (2.6% or 15.5ha).

Table 8.39 – Overall Constraints / Quality Analysis - Wellingborough

	Land (ha)	%
Constrained Land	**573.7**	**94.8**
Of High Quality	128.3	21.2
Of Fair / Poor Quality	445.4	73.6
Unconstrained Land	**31.5**	**5.2**
Of High Quality	15.5	2.6
Of Fair / Poor Quality	16.0	2.6
Total	**605.2**	**100.0**

8.75 Table 8.40 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time), whilst Table 8.41 provides a summary of the amount of land available according to the estimated timeframe.

8.76 The tables demonstrate that Wellingborough has only 15.5ha which could come forward straight away, although over half could be delivered in up to three years (depending on market demand).

Table 8.40 – Potential Timeframe for Delivery - Wellingborough

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
3W	Harrowden Court	2.2	X					
4W	Central Park	2.3	X					
5W	Sanders Business Park	1.3	X					
15W	Ogee Business Park	9.7	X					
9W	Side Gate Works	0.6		X				
16W	Pulse Park	152.0		X				
W1	Stanton Cross	46.7			X			
6W	Upper Redhill	10.5			X			
8W	Land at Doddington Road, Wollaston	3.8			X			
10W	Sywell Aerodrome	5.5			X			
11W	Sywell Grange	43.0			X			
12W	Water Garden	1.2			X			
13W	Wilby Grange	16.2			X			
14W	Appleby Lodge	65.3			X			
7W	Ecton Estate	7.5				X		
17W	Southwest Rushden	205.0				X		
2W	Land East of Stanton Cross	32.3						X

Table 8.41 – Summary of Potential Timeframe for Delivery - Wellingborough

Timeframe for Delivery	Land (ha)	%
Immediate	15.5	2.6
Within 1 year	152.6	25.2
1-3 years	192.2	31.8
4-6 years	212.5	35.1
7-10 years	0.0	0.0
10+ years	32.3	5.3
Total	605.2	100.0

Wellingborough Summary

8.77 Wellingborough has around 605ha of land which may be suitable for employment development up to 2031. However, it is estimated that around 94.8% of this land is constrained by a variety of factors.

8.78 Wellingborough has a number of medium-large scale sites which have the potential to meet strategic demand for employment development over the next 20 years. However, the major urban extension at Stanton Cross, which includes significant proposals for employment development, is constrained by funding issues in the current market whilst sites to the west of the town are constrained by the capacity of the highways network and the delivery of the Wellingborough – Kettering link road.

8.79 There are also a number of rural sites which are constrained in terms of their location and a very large area of land immediately west of Rushden, which has potential for distribution uses but which would require a very significant investment in infrastructure before any site could come forward.

8.80 As a result, Wellingborough may experience some issues in meeting the demand for employment land within the short-medium term. Unless site specific constraints can be overcome quickly at some of the larger sites, Wellingborough's potential economic growth maybe constrained from the lack of supply of good quality employment land being brought forward.

South Northamptonshire

8.81 Table 8.34 illustrates that a total of 584ha of land was assessed in South Northamptonshire, of which just 11.5% was considered to be largely free from development constraints.

Table 8.42 – Constrained / Unconstrained Land – South Northamptonshire

	Ha	%
Constrained Land	517.1	88.5
Land with No Serious Constraints	67.0	11.5
Total	584.2	100.0

8.82 Table 8.43 illustrates that 12 sites in South Northamptonshire are not subject to serious known constraints, whilst the remaining 31 are subject to a range of constraints. All of the larger sites, with the exception of Silverstone Circuit, have been assessed as subject to some kind of constraints, with most sites that were assessed as free from constraints located in rural areas and are relatively small in size.

Table 8.43 – South Northamptonshire Sites by Constraints

Site Ref No.	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
S1	Silverstone Circuit	37.7	X								
S3	Burcote Road	1.6	X								
S15	Tove Valley	1.0	X								
S22	Brackley Saw Mills	2.0	X								
S31	Central Woolgrowers	0.2	X								
S32	Old Tiffield Road	1.6	X								
S33	Aynho Station	1.4	X								
S35	The Wharf	0.6	X								
S36	GP1 Grange Park	9.1	X								
S37	GP4 Grange Park	8.0	X								
S38	Former Elementis Site	0.3	X								
S40	ABP Blisworth	3.6	X								
S2	Shacks Barn Farm	21.0						X	X		
S4	Moat Lane	0.5									X
S5	Rignall Farm	14.1					X		X		
S6	Arm Farm	57.0				X			X		
S7	Hazelborough Depot	0.6							X		
S8	Salcey Depot	0.5							X		
S9	Turweston Road, Brackley	14.0					X		X		
S10	West Hampton	22.5					X		X		
S11	South of Kislingbury	12.5				X	X		X		
S12	Towcester Vale	20.6						X	X	X	
S13	Turweston Road	10.2				X	X		X		
S14	Grange Park	1.0							X		

S16	Midway Park	150.0					X		X		
S17	Burcote Wood Farm	24.5					X	X	X		
S18	Radstone Fields	2.0				X	X		X		
S19	Plainwood House, Roade	28.2					X		X		
S20	Towcester Road, Milton Malsor	7.0					X		X		
S21	Towcester Road, Milton Malsor	5.3					X		X		
S23	Busfields	2.6					X		X		
S24	Collingtree Road	9.3				X			X	X	
S25	The Paddocks	2.4					X		X		
S26	Abbotts Way	2.9					X		X		
S27	Dovecote Farm	2.8					X		X		
S28	Highgate	13.0						X	X	X	
S29	Wootton SDA	5.0						X	X	X	
S30	Preston Green	50.0						X	X	X	
S34	Pineham West	16.0				X			X		
S39	Forest Road	1.1							X		
S41	Gayton Road	2.0							X		
S42	South of Jacks Café	8.5				X			X		
S43	Towcester Racecourse	10.0				X			X		

8.83 Table 8.44 illustrates that 88.4% of all land assessed as part of the study is subject to planning constraints, whilst just 12% is free from such constraints. The majority of the land which is not subject to planning constraints is also free from other physical constraints.

Table 8.44 – Land Subject to Planning Constraints – South Northamptonshire

	Land (ha)	%
Land Without Planning Constraints	**67.5**	**11.6**
Subject to Other Constraints	0.5	0.1
Unconstrained	67.0	11.5
Land with Planning Constraints	**516.6**	**88.4**
Also Subject to Other Constraints	511.4	87.5
No Additional Constraints	5.2	0.9
Total	**584.2**	**100.0**

8.84 Table 8.45 illustrates the likelihood of each site coming forward for employment development up to 2031. Table 8.46 provides a summary of the amount of land available by the likelihood of it coming forward.

8.85 The tables demonstrate that approximately 55% of land in South Northamptonshire (321ha) scores 3.5 or above, which means it is relatively likely to come forward to 2031 for employment uses. This is a relatively high proportion of land which is likely to come forward compared to other local authorities in Northamptonshire. This is largely due to sites which have a high degree of developer interest in them already, as well as a number of sites which have planning permission.

Table 8.45 – Likelihood of Site Coming Forward for Development – South Northamptonshire

Site Ref No.	Site Name	Total area for employment (ha)	Likelihood of site coming forward for employment
S1	Silverstone Circuit	37.7	5
S3	Burcote Road	1.6	5
S4	Moat Lane	0.5	5
S13	Turweston Road	10.2	5
S14	Grange Park	1.0	5
S15	Tove Valley	1.0	5
S22	Brackley Saw Mills	2.0	5
S31	Central Woolgrowers	0.2	5
S32	Old Tiffield Road	1.6	5
S36	GP1 Grange Park	9.1	5
S37	GP4 Grange Park	8.0	5
S38	Former Elementis Site	0.3	5
S9	Turweston Road, Brackley	14.0	4
S12	Towcester Vale	20.6	4
S17	Burcote Wood Farm	24.5	4
S18	Radstone Fields	2.0	4
S33	Aynho Station	1.4	4
S34	Pineham West	16.0	4
S35	The Wharf	0.6	4
S42	South of Jacks Café	8.5	4
S43	Towcester Racecourse	10.0	4
S16	Midway Park	150.0	4
S10	West Hampton	22.5	3
S29	Wootton SDA	5.0	3

S39	Forest Road	1.1	3
S40	ABP Blisworth	3.6	3
S41	Gayton Road	2.0	3
S6	Arm Farm	57.0	2
S23	Busfields	2.6	2
S30	Preston Green	50.0	2
S2	Shacks Barn Farm	21.0	1
S5	Rignall Farm	14.1	1
S7	Hazelborough Depot	0.6	1
S8	Salcey Depot	0.5	1
S11	South of Kislingbury	12.5	1
S19	Plainwood House, Roade	28.2	1
S20	Towcester Road, Milton Malsor	7.0	1
S21	Towcester Road, Milton Malsor	5.3	1
S24	Collingtree Road	9.3	1
S25	The Paddocks	2.4	1
S26	Abbotts Way	2.9	1
S27	Dovecote Farm	2.8	1
S28	Highgate	13.0	1

Table 8.46 – Likelihood of Development – South Northamptonshire Summary

Score	Sites	Land (ha)	%
Above 4	12	73.1	12.5
Above 3 -4	10	247.6	42.4
Above 2 -3	5	34.2	5.9
Above 1 – 2	3	109.5	18.8
0-1	13	119.7	20.5
Total	43	584.2	100.0

8.86 Table 8.47 illustrates that just two sites were considered to be within the high sustainability category, both of which are located within Towcester town centre, whilst 19 sites, all generally within rural area, are considered as poor in sustainability terms. In total, 11 sites were assessed as high quality, whilst 19 sites were assessed as poor quality, most of which are located within rural areas.

Table 8.47 – Quality Scores – South Northamptonshire

Site Ref No.	Site Name	Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
S3	Burcote Road	1.6			
S1	Silverstone Circuit	37.7			
S4	Moat Lane	0.5			
S14	Grange Park	1.0			
S15	Tove Valley	1.0			
S22	Brackley Saw Mills	2.0			
S31	Central Woolgrowers	0.2			
S32	Old Tiffield Road	1.6			
S34	Pineham West	16.0			
S36	GP1 Grange Park	9.1			
S37	GP4 Grange Park	8.0			
S5	Rignall Farm	14.1			
S9	Turweston Road, Brackley	14.0			
S10	West Hampton	22.5			
S11	South of Kislingbury	12.5			
S12	Towcester Vale	20.6			
S13	Turweston Road	10.2			
S17	Burcote Wood Farm	24.5			
S18	Radstone Fields	2.0			
S28	Highgate	13.0			
S29	Wootton SDA	5.0			
S30	Preston Green	50.0			
S42	South of Jacks Café	8.5			
S43	Towcester Racecourse	10.0			
S16	Midway Park	150.0			
S6	Arm Farm	57.0			
S33	Aynho Station	1.4			
S41	Gayton Road	2.0			
S2	Shacks Barn Farm	21.0			
S7	Hazelborough Depot	0.6			

S8	Salcey Depot	0.5				
S19	Plainwood House, Roade	28.2				
S20	Towcester Road, Milton Malsor	7.0				
S21	Towcester Road, Milton Malsor	5.3				
S23	Busfields	2.6				
S24	Collingtree Road	9.3				
S25	The Paddocks	2.4				
S26	Abbotts Way	2.9				
S27	Dovecote Farm	2.8				
S35	The Wharf	0.6				
S38	Former Elementis Site	0.3				
S39	Forest Road	1.1				
S40	ABP Blisworth	3.6				

8.87 Table 8.48 illustrates that the total amount of land assessed according to all known planning constraints as well as the overall quality of the site. The table illustrates that the majority of the land identified as unconstrained in planning terms is also considered to be of high quality (11% or 61.7ha in total).

Table 8.48 – Planning Constraints / Quality Analysis – South Northamptonshire

	Land (ha)	%
Land Without Planning Constraints	**67.5**	**11.6**
Of High Quality	61.7	10.6
Of Fair/Poor Quality	5.8	1.0
Land with Planning Constraints	**516.6**	**88.4**
Of High Quality	17.0	2.9
Of Fair/Poor Quality	499.6	85.5
Total	**584.2**	**100.0**

8.88 Table 8.49 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that just 10.5% (61ha) of the land identified as unconstrained is also considered to be of high quality.

Table 8.49 – Overall Constraints / Quality Analysis – South Northamptonshire

	Land (ha)	%
Constrained Land	**517.1**	**88.5**
Of High Quality	17.5	3.0
Of Fair / Poor Quality	499.6	85.5
Unconstrained Land	**67.0**	**11.5**
Of High Quality	61.2	10.5
Of Fair / Poor Quality	5.8	1.0
Total	**584.2**	**100.0**

8.89 Table 8.50 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time) whilst Table 8.51 provides a summary of the amount of land available according to the estimated timeframe.

8.90 The tables demonstrate that South Northamptonshire has only 2.6ha which could come forward straight away, although over half could be delivered in up to three years (depending on market demand).

Table 8.50 – Potential Timeframe for Delivery – South Northamptonshire

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
S3	Burcote Road	1.6	X					
S15	Tove Valley	1.0	X					
S7	Hazelborough Depot	0.6		X				
S8	Salcey Depot	0.5		X				
S13	Turweston Road	10.2		X				
S14	Grange Park	1.0		X				
S31	Central Woolgrowers	0.2		X				
S36	GP1 Grange Park	9.1		X				
S37	GP4 Grange Park	8.0		X				
S38	Former Elementis Site	0.3		X				
S39	Forest Road	1.1		X				
S40	ABP Blisworth	3.6		X				
S41	Gayton Road	2.0		X				
S1	Silverstone Circuit	37.7			X			
S2	Shacks Barn Farm	21.0			X			
S4	Moat Lane	0.5			X			
S9	Turweston Road, Brackley	14.0			X			
S12	Towcester Vale	20.6			X			
S16	Midway Park	150.0			X			
S17	Burcote Wood Farm	24.5			X			
S20	Towcester Road, Milton Malsor	7.0			X			
S21	Towcester Road, Milton Malsor	5.3			X			
S22	Brackley Saw Mills	2.0			X			
S32	Old Tiffield Road	1.6			X			
S33	Aynho Station	1.4			X			
S34	Pineham West	16.0			X			
S35	The Wharf	0.6			X			
S42	South of Jacks Café	8.5			X			
S43	Towcester Racecourse	10.0			X			

S5	Rignall Farm	14.1				X		
S6	Arm Farm	57.0				X		
S10	West Hampton	22.5				X		
S11	South of Kislingbury	12.5				X		
S19	Plainwood House, Roade	28.2				X		
S23	Busfields	2.6				X		
S24	Collingtree Road	9.3				X		
S25	The Paddocks	2.4				X		
S26	Abbotts Way	2.9				X		
S29	Wootton SDA	5.0				X		
S30	Preston Green	50.0				X		
S18	Radstone Fields	2.0					X	
S27	Dovecote Farm	2.8					X	
S28	Highgate	13.0						X

Table 8.51 – Summary of Timeframe for Delivery – South Northamptonshire

Timeframe for Delivery	Land (ha)	%
Immediate	2.6	0.4
Within 1 year	36.6	6.3
1-3 years	320.7	54.9
4-6 years	206.4	35.3
7-10 years	4.8	0.8
10+ years	13.0	2.2
Total	584.2	100.0

South Northamptonshire Summary

8.91 South Northamptonshire has around 584ha of land which may be suitable for employment development up to 2031. However, it is estimated that around 89% of this land is constrained by a variety of factors.

8.92 South Northamptonshire has a wide range of sites which have the potential to meet a number of markets for employment uses. It has a number of small rural sites which may be able to meet local general industrial and workshop need. Many of these sites are largely unconstrained although South Northamptonshire will need to be careful about how many of these sites it brings forward in terms of its sustainability strategy. It also has a number of smaller towns, such as Brackley and Towcester, which have available sites to meet local demand. Many of these sites are also subject to few constraints, although Towcester's major opportunity for strategic growth is dependent upon the delivery of a new road, which is turn dependent upon the delivery of housing, which may take some time to come forward.

8.93 South Northamptonshire also has a number of sites which are able to be developed as urban extensions to Northampton. The quality of these sites around Northampton varies enormously and is largely related to their ability to access to the M1 and into Northampton.

8.94 It is unlikely that South Northamptonshire will need to identify further land in addition to that already assessed as part of this study. As long as the constraints on particular sites, specifically at Towcester, can be overcome quickly, South Northamptonshire should be able to have sufficient quality sites to meet its demand for growth.

Northampton

8.95 Table 8.52 illustrates that a total of 192ha of land was assessed in Northampton, of which 39% was considered to be largely free from development constraints.

Table 8.52 – Constrained / Unconstrained Land - Northampton

	Land (Ha)	%
Constrained Land	117.7	61.3
Land with No Serious Constraints	74.3	38.7
Total	192.0	100.0

8.96 Table 8.53 illustrates that 21 sites in Northampton are not subject to serious known constraints, whilst the remaining 16 are subject to a range of constraints. Most of the unconstrained sites are relatively small in size and are largely made up of employment land on existing industrial estates that has yet to be developed.

Table 8.53 – Northampton sites- by Constraints

Site Ref No.	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
N2	Caswell Road	1.4	X								
N3	Pavilion Drive	1.6	X								
N4	Nationwide Beach Car Park	3.2	X								
N5	Avon Site	12.0	X								
N6	Site F & G Upton	1.5	X								
N7	Reynoldstone Road	0.1	X								
N8	Swan Valley	1.6	X								
N9	Moulton Court	1.0	X								
N11	Former L & H Polymers Site	3.2	X								

N13	The Lakes, Bedford Road, Northampton	3.1	X								
N19	Crow Lane	2.5	X								
N24	Pineham E & C	14.0	X								
N25	Swan Valley, SV1	9.5	X								
N26	Swan Valley, SV3	1.5	X								
N28	Swan Valley SV7	4.3	X								
N29	Milton Ham	10.0	X								
N30	Round Spinney RS2	0.3	X								
N32	SJ 2 St James	0.9	X								
N34	Lady's Lane	0.4	X								
N35	TC3 Newland Town Centre	0.4	X								
N36	TC4, Victoria Street	1.8	X								
N1	Rowtree Road, East Hunsbury	6.3					X		X		
N10	Coca Cola, Brackmills	12.8		X							
N12	Collingtree	2.0								X	
N14	Martins Farm	32.4									X
N15	Upton Lodge	4.8						X		X	
N16	Upton Park	4.5				X		X		X	
N17	Castle Station	5.3					X				
N18	Waterside	2.0					X				
N20	St Johns, Northampton	0.6		X							
N21	Angel Street	0.7		X							
N22	Timken Site - Aspect Business Park	5.4								X	
N23	Bridge Street, Northampton	1.5		X							
N31	Kingsheath, Dallington Fields, Lodge Farm, Northampton	14.0						X			
N33	FC1 Far Cotton	1.4					X				
N37	Houghton Gate, Bedford Road	19.5			X		X		X		
N38	Edgar Mobbs Way	4.6					X				

8.97 Table 8.54 illustrates that 166ha of land assessed as part of the study in Northampton is free from planning constraints. However, the majority of this land (118ha) is subject to other constraints before development is likely to take place.

Table 8.54 – Land Subject to Planning Constraints - Northampton

	Land (ha)	%
Land Without Planning Constraints	**166.3**	**86.6**
Subject to Other Constraints	117.7	61.3
Unconstrained	74.3	38.7
Land with Planning Constraints	**25.8**	**13.4**
Also Subject to Other Constraints	25.8	13.4
No Additional Constraints	0.0	0.0
Total	**192.0**	**100.0**

8.98 Table 8.55 illustrates the likelihood of each site coming forward for employment development up to 2031. Table 8.56 provides a summary of the amount of land available by the likelihood of it coming forward.

8.99 The tables demonstrate that around 73% of land in Northampton (140ha) scores 3.5 or above, which means it is relatively likely to come forward to 2031 for employment uses.

8.100 This is the largest proportion of sites judged to be relatively likely to come forward for development of any local authority in the County and is a result of the relatively large proportion of land available which is located on existing industrial estates and is largely unconstrained, as well as the fact that the market for employment development in Northampton is the strongest in the County.

Table 8.55 – Likelihood of site coming Forward Score - Northampton

Site Ref No.	Site Name	Total area for employment (ha)	Likelihood of site coming forward for employment
N2	Caswell Road	1.4	5
N3	Pavilion Drive	1.6	5
N4	Nationwide Beach Car Park	3.2	5
N7	Reynoldstone Road	0.1	5
N8	Swan Valley	1.6	5
N9	Moulton Court	1.0	5
N13	The Lakes, Bedford Road, Northampton	3.1	5
N15	Upton Lodge	4.8	5
N16	Upton Park	4.5	5
N22	Timken Site - Aspect Business Park	5.4	5
N24	Pineham E & C	14.0	5
N25	Swan Valley, SV1	9.5	5
N26	Swan Valley, SV3	1.5	5
N28	Swan Valley SV7	4.3	5

N29	Milton Ham	10.0	5
N30	Round Spinney RS2	0.3	5
N32	SJ 2 St James	0.9	5
N38	Edgar Mobbs Way	4.6	5
N5	Avon Site	12.0	4
N6	Site F & G Upton	1.5	4
N10	Coca Cola, Brackmills	12.8	4
N14	Martins Farm	32.4	4
N17	Castle Station	5.3	4
N18	Waterside	2.0	4
N19	Crow Lane	2.5	4
N11	Former L & H Polymers Site	3.2	3
N12	Collingtree	2.0	3
N20	St Johns, Northampton	0.6	3
N21	Angel Street	0.7	3
N23	Bridge Street, Northampton	1.5	3
N31	Kingsheath, Dallington Fields, Lodge Farm, Northampton	14.0	3
N34	Lady's Lane	0.4	3
N35	TC3 Newland Town Centre	0.4	3
N36	TC4, Victoria Street	1.8	3
N37	Houghton Gate, Bedford Road	19.5	3
N33	FC1 Far Cotton	1.4	2
N1	Rowtree Road, East Hunsbury	6.3	1

Table 8.56 – Summary of Likelihood of site coming forward Score for Northampton

Score	Sites	Land	%
Above 4	18	71.8	37.4
Above 3 -4	7	68.5	35.7
Above 2 -3	10	44.1	23.0
Above 1 - 2	1	1.4	0.7
0-1	1	6.3	3.3
Total	37	192.0	100.0

8.101 Table 8.57 illustrates that 12 sites were considered to be within the high sustainability category, mostly all of which are located within the central area of the town, whilst just one site, Rowtree

Road, which is on the southwestern edge of the local authority boundary and is not part of the existing urban area, is considered as poor in sustainability terms. In terms of overall quality, 28 sites were assessed to be of good quality, which is the highest proportion of good quality sites of any local authority in the County.

Table 8.57 – Quality Scores - Northampton

Site Ref No.	Site Name	Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
N5	Avon Site	12.0			
N17	Castle Station	5.3			
N18	Waterside	2.0			
N20	St Johns, Northampton	0.6			
N21	Angel Street	0.7			
N23	Bridge Street, Northampton	1.5			
N34	Lady's Lane	0.4			
N35	TC3 Newland Town Centre	0.4			
N36	TC4, Victoria Street	1.8			
N2	Caswell Road	1.4			
N3	Pavilion Drive	1.6			
N4	Nationwide Beach Car Park	3.2			
N6	Site F & G Upton	1.5			
N7	Reynoldstone Road	0.1			
N8	Swan Valley	1.6			
N9	Moulton Court	1.0			
N10	Coca Cola, Brackmills	12.8			
N13	The Lakes, Bedford Road, Northampton	3.1			
N14	Martins Farm	32.4			
N24	Pineham E & C	14.0			
N25	Swan Valley, SV1	9.5			
N26	Swan Valley, SV3	1.5			
N28	Swan Valley SV7	4.3			
N29	Milton Ham	10.0			
N30	Round Spinney RS2	0.3			
N32	SJ 2 St James	0.9			

N33	FC1 Far Cotton	1.4			
N37	Houghton Gate, Bedford Road	19.5			
N11	Former L & H Polymers Site	3.2			
N12	Collingtree	2.0			
N15	Upton Lodge	4.8			
N16	Upton Park	4.5			
N19	Crow Lane	2.5			
N22	Timken Site - Aspect Business Park	5.4			
N31	Kingsheath, Dallington Fields, Lodge Farm, Northampton	14.0			
N38	Edgar Mobbs Way	4.6			
N1	Rowtree Road, East Hunsbury	6.3			

8.102 Table 8.58 illustrates that the total amount of land assessed according to known planning constraints and the overall quality of the site (as identified within Table 8.57). The table shows that 65% (125ha) of the total land assessed is not subject to planning constraints and is of high quality.

Table 8.58 – Planning Constraints / Quality Analysis - Northampton

	Land (ha)	%
Land Without Planning Constraints	**166.3**	**86.6**
Of High Quality	125.3	65.2
Of Fair/Poor Quality	41.0	21.4
Land with Planning Constraints	**25.8**	**13.4**
Of High Quality	19.5	10.2
Of Fair/Poor Quality	6.3	3.3
Total	**192.0**	**100.0**

8.103 Table 8.59 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that the majority of the land identified as unconstrained is also considered to be of high quality (68.6ha or 35.7% of the total land in Northampton).

Table 8.59 – Overall Constraints / Quality Analysis - Northampton

	Land (ha)	%
Constrained Land	**117.7**	**61.3**
Of High Quality	76.2	39.7
Of Fair / Poor Quality	41.5	21.6
Unconstrained Land	**74.3**	**38.7**
Of High Quality	68.6	35.7
Of Fair / Poor Quality	5.7	3.0
Total	**192.0**	**100.0**

8.104 Table 8.60 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time), whilst Table 8.61 provides a summary of the amount of land available according to the estimated timeframe.

8.105 The tables demonstrate that Northampton has only 4.2ha which is likely to come forward straight away, despite the fact that many sites are available and there is high demand. This is because we expect many of the sites to come forward for development in 1-3 years when the economic climate becomes more favourable.

Table 8.60 – Potential Timeframe for Delivery - Northampton

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
N9	Moulton Court	1.0	X					
N11	Former L & H Polymers Site	3.2	X					
N30	Round Spinney RS2	0.3		X				
N38	Edgar Mobbs Way	4.6		X				
N1	Rowtree Road, East Hunsbury	6.3			X			
N2	Caswell Road	1.4			X			
N3	Pavilion Drive	1.6			X			
N4	Nationwide Beach Car Park	3.2			X			
N5	Avon Site	12.0			X			
N6	Site F & G Upton	1.5			X			
N7	Reynoldstone Road	0.1			X			
N8	Swan Valley	1.6			X			
N13	The Lakes, Bedford Road, Northampton	3.1			X			
N14	Martins Farm	32.4			X			
N15	Upton Lodge	4.8			X			
N19	Crow Lane	2.5			X			
N22	Timken Site - Aspect Business Park	5.4			X			

N24	Pineham E & C	14.0			X			
N25	Swan Valley, SV1	9.5			X			
N26	Swan Valley, SV3	1.5			X			
N28	Swan Valley SV7	4.3			X			
N29	Milton Ham	10.0			X			
N32	SJ 2 St James	0.9			X			
N34	Lady's Lane	0.4			X			
N35	TC3 Newland Town Centre	0.4			X			
N36	TC4, Victoria Street	1.8			X			
N10	Coca Cola, Brackmills	12.8				X		
N12	Collingtree	2.0				X		
N16	Upton Park	4.5				X		
N17	Castle Station	5.3				X		
N18	Waterside	2.0				X		
N20	St Johns, Northampton	0.6				X		
N21	Angel Street	0.7				X		
N23	Bridge Street, Northampton	1.5				X		
N31	Kingsheath, Dallington Fields, Lodge Farm, Northampton	14.0				X		
N33	FC1 Far Cotton	1.4				X		
N37	Houghton Gate, Bedford Road	19.5				X		

Table 8.61 – Summary of Timeframe for Delivery - Northampton

Timeframe for Delivery	Area (ha)	%
Immediate	4.2	2.2
Within 1 year	4.9	2.6
1-3 years	118.6	61.8
4-6 years	64.3	33.5
7-10 years	0.0	0.0
10+ years	0.0	0.0
Total	192.0	100.0

Northampton Summary

8.106 Northampton has around 192ha of land which may be suitable for employment development up to 2031. However, it is estimated that around 61% of this land is constrained by a variety of factors.

8.107 Northampton has a large proportion of land which is considered to be largely unconstrained (relative to other local authorities), generally because many of the sites assessed are located within existing industrial estates and distribution parks, where the infrastructure already and planning permission already exists, but remains to be developed at the current time.

8.108 There is obviously potential for these smaller sites to meet demand for employment development within the short-term. However, Northampton does not have a large strategic site which could accommodate medium-long-term growth, or if there is a need for a large research and development or business park to 2031.

8.109 Northampton does have a number of opportunities for office development within the town centre which should be the focus for office uses wherever possible. However, a number of these sites are severely constrained, especially the Castle Station site which represents a significant opportunity for a step change in the quality and quantity of town centre office floorspace. It will be important that these constraints are overcome as quickly as possible so as to not impede the potential growth of office-based businesses within Northampton, especially within the town centre.

8.110 Local education partners have highlighted a potential for a Knowledge Triangle, consisting of a cluster of knowledge-based employment, education-related uses, cultural facilities, and other complementary uses. The creation, for example, of a Knowledge Triangle between the University, Moulton College and Northampton College would present the opportunity to create a premier employment site in Northamptonshire for knowledge-based industries and university spin-outs. A site of this nature may:

- facilitate university related business development and clustering;
- provide a high quality setting for move-on businesses which still require a link to the university; and
- capitalise on Northampton University's growing reputation in key disciplines.

Daventry

8.111 Table 8.62 illustrates that a total of 697ha of land was assessed in Daventry, of which just 14% was considered to be largely free from development constraints. It should be noted that additional sites around the Marches, South West and Town Centre may emerge and be revised in light of ongoing public sector masterplanning and development opportunities.

Table 8.62 – Constrained / Unconstrained Land - Daventry

	Ha	%
Constrained Land	597.3	85.8
Land with No Serious Constraints	99.3	14.2
Total	696.6	100.0

8.112 Table 8.63 illustrates that 7 sites in Daventry are not subject to serious known constraints, whilst the remaining 19 are subject to a range of constraints. With the exception of the DIRFT expansion site and the Apex Park site, the rest of the unconstrained sites are relatively small in size.

Table 8.63 – Daventry Sites by Constraints

Site Ref No.	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other
D1	DIRFT Expansion Site	54.0	X								
D2	Apex Park, Daventry	35.0	X								
D20	Manor Business Park	5.5	X								
D22	Heartlands Phase 2	1.6	X								
D27	Daventry Town Centre Site 3	1.5	X								
D26	Daventry Town Centre Phase 5 South	1.0	X								
D33	Daventry Town Centre Site 4G	0.7	X								
D4	Rugby Radio Station	210.0					X		X		
D3	Nortoft Lane, Kilsby	48.0					X		X		
D19	Round Hill	45.0						X	X	X	
D35	Land at A428 West of M1 at J18 Crick	43.5					X		X		
D21	Former Midland Meat Packers Ltd	38.7									X
D8	Drayton Gate Farm	31.0				X			X		
D34	Land at Yelvertoft Road	29.0					X		X		
D13	Portly Ford Farm	28.0					X		X		
D17	Dodford Minerals Site	25.0			X				X		X
D16	Filbert Lodge	13.8				X	X		X		
D31	Land adjacent to M1 J18 north and west of Holiday Inn Hotel, Crick	11.7					X		X		
D6	Danetree Phase 1 (Burnt Walls)	10.0							X	X	
D30	Overstone Leys	10.0					X		X	X	
D11	Station Road, Long Buckby	9.6					X		X		
D25	Weedon Royal Ordnance Depot and Magazine Store	9.2							X		
D7	Boughton Road, Moulton	7.2					X		X		
D5	Ilmor Way, Brixworth	6.2							X		
D23	Holly Lodge Drive	5.2					X		X		
D28	Long March, Daventry	4.0		X			X				
D29	Pitsford Centre	4.0					X		X	X	

D10	Browns Road	3.2			X				X		
D12	Church Fields	2.0							X	X	
D24	Manor Park Business Park Extension	1.0				X			X		
D15	Foxhill Farm	0.9					X		X		
D32	Daventry Town Centre Site 2	0.6		X							
D14	Whilton Mill	0.5							X		

8.113 Table 8.64 illustrates that 79.5% of all land assessed as part of the study is subject to planning constraints. However, the District has a relatively large amount of land (in terms of total area) which is not subject to planning constraints (143ha), with the majority of this (99ha) free from other physical constraints. The relatively large proportion of land available in Daventry is a result of a number of large sites near the junction with the M1, where there is strong demand for national and international distribution uses.

Table 8.64 – Land Subject to Planning Constraints - Daventry

	Land (ha)	%
Land Without Planning Constraints	**142.6**	**20.5**
Subject to Other Constraints	43.3	6.2
Unconstrained	99.3	14.2
Land with Planning Constraints	**554.0**	**79.5**
Also Subject to Other Constraints	538.1	77.3
No Additional Constraints	15.9	2.3
Total	**696.6**	**100.0**

8.114 Table 8.65 illustrates the likelihood of each site coming forward for employment development up to 2031. Table 8.66 provides a summary of the amount of land available by the likelihood of it coming forward.

8.115 The tables demonstrate that around 54.9% of land in Daventry (383ha) scores 3.5 or above, which means it is relatively likely to come forward to 2031 for employment uses.

8.116 This is the largest proportion of land judged to be relatively likely to come forward for development of any local authority in the County and is again a result of a number of very large sites clustered around the DIRFT area which have excellent links to the national highway network and are likely to come forward for national distribution uses.

Table 8.65 – Likelihood of Site coming Forward Score - Daventry

Site Ref No.	Site Name	Total area for employment (ha)	Likelihood of site coming forward for employment
D1	DIRFT Expansion Site	54.0	5
D2	Apex Park, Daventry	35.0	5
D6	Danetree Phase 1 (Burnt Walls)	10.0	5
D20	Manor Business Park	5.5	5
D21	Former Midland Meat Packers Ltd	38.7	5
D22	Heartlands Phase 2	1.6	5
D4	Rugby Radio Station	210.0	4
D5	Ilmor Way, Brixworth	6.2	4
D10	Browns Road	3.2	4
D27	Daventry Town Centre Site 3	1.5	4
D28	Long March, Daventry	4.0	4
D31	Land adjacent to M1 J18 north and west of Holiday Inn Hotel, Crick	11.7	4
D32	Daventry Town Centre Site 2	0.6	4
D33	Daventry Town Centre Site 4G	0.7	4
D12	Church Fields	2.0	3
D14	Whilton Mill	0.5	3
D23	Holly Lodge Drive	5.2	3
D24	Manor Park Business Park Extension	1.0	3
D26	Daventry Town Centre Phase 5 South	1.0	3
D29	Pitsford Centre	4.0	3
D30	Overstone Leys	10.0	3
D34	Land at Yelvertoft Road	29.0	3
D8	Drayton Gate Farm	31.0	2
D16	Filbert Lodge	13.8	2
D19	Round Hill	45.0	2
D25	Weedon Royal Ordnance Depot and Magazine Store	9.2	2
D35	Land at A428 West of M1 at J18 Crick	43.5	2
D3	Nortoft Lane, Kilsby	48.0	1
D7	Boughton Road, Moulton	7.2	1

D11	Station Road, Long Buckby	9.6	1
D13	Portly Ford Farm	28.0	1
D15	Foxhill Farm	0.9	1
D17	Dodford Minerals Site	25.0	1

Table 8.66 – Liklihood of Site Coming Forward Summary - Daventry

Score	Sites	Land	%
Above 4	6	144.8	20.8
Above 3 -4	8	237.9	34.1
Above 2 -3	8	52.7	7.6
Above 1 - 2	5	142.5	20.5
0-1	6	118.7	17.0
Total	33	696.6	100.0

8.117 Table 8.67 illustrates that 5 sites were considered to be within the high sustainability category. These three sites include 4 within Daventry town centre as well as the DIRFT Expansion site, which has been given the ‘high’ rating due to its links to the national rail freight network. 10 sites, most of which are located in rural area, were considered as poor in sustainability terms. A total of 12 sites were assessed as high quality, most of which are either within the Daventry town urban area or close to DIRFT.

Table 8.67 – Quality Scores – Daventry

Site Ref No.	Site Name	Total area for employment (ha)	Sustainability Score	Commercial suitability	Total Quality
D1	DIRFT Expansion Site	54.0			
D33	Daventry Town Centre Site 4G	0.7			
D26	Daventry Town Centre Phase 5 South	1.0			
D27	Daventry Town Centre Site 3	1.5			
D32	Daventry Town Centre Site 2	0.6			
D2	Apex Park, Daventry	35.0			
D4	Rugby Radio Station	210.0			
D21	Former Midland Meat Packers Ltd	38.7			
D22	Heartlands Phase 2	1.6			
D23	Holly Lodge Drive	5.2			
D31	Land adjacent to M1 J18 north and west of Holiday Inn Hotel, Crick	11.7			
D34	Land at Yelvertoft Road	29.0			
D3	Nortoft Lane, Kilsby	48.0			
D5	Ilmor Way, Brixworth	6.2			
D6	Danetree Phase 1 (Burnt Walls)	10.0			
D8	Drayton Gate Farm	31.0			
D10	Browns Road	3.2			
D12	Church Fields	2.0			
D15	Foxhill Farm	0.9			
D19	Round Hill	45.0			
D28	Long March, Daventry	4.0			
D30	Overstone Leys	10.0			
D35	Land at A428 West of M1 at J18 Crick	43.5			
D13	Portly Ford Farm	28.0			
D17	Dodford Minerals Site	25.0			
D20	Manor Business Park	5.5			
D24	Manor Park Business Park Extension	1.0			
D7	Boughton Road, Moulton	7.2			
D11	Station Road, Long Buckby	9.6			

D14	Whilton Mill	0.5			
D16	Filbert Lodge	13.8			
D25	Weedon Royal Ordnance Depot and Magazine Store	9.2			
D29	Pitsford Centre	4.0			

8.118 Table 8.68 illustrates the total amount of land assessed according to known planning constraints and the overall quality of the site (as identified within Table 8.67). The table shows that 19.1% (133ha) of the total land assessed is not subject to planning constraints and is of high quality.

Table 8.68 – Planning Constraints / Quality Analysis - Daventry

	Land (ha)	%
Land Without Planning Constraints	**142.6**	**20.5**
Of High Quality	133.1	19.1
Of Fair/Poor Quality	9.5	1.4
Land with Planning Constraints	**554.0**	**79.5**
Of High Quality	255.9	36.7
Of Fair/Poor Quality	298.1	42.8
Total	**696.6**	**100.0**

8.119 Table 8.69 illustrates the total amount of land assessed according to all known constraints as well as the overall quality of the site. The table illustrates that just 13.5% of all land assessed is considered to be unconstrained and of high quality, although this does represent a relatively large amount of land in terms of total area (94ha). Again, a large proportion of this land is located close to DIRFT, although Daventry town has a reasonable supply of suitable land too.

Table 8.69 – Overall Constraints / Quality Analysis - Daventry

	Land (ha)	%
Constrained Land	**597.3**	**85.8**
Of High Quality	295.2	42.4
Of Fair / Poor Quality	302.1	43.4
Unconstrained Land	**99.3**	**14.2**
Of High Quality	93.8	13.5
Of Fair / Poor Quality	5.5	0.8
Total	**696.6**	**100.0**

8.120 Table 8.70 illustrates the potential timeframe for the delivery of employment development on each site (assuming that all constraints could be overcome in time) whilst Table 8.71 provides a summary of the amount of land available according to the estimated timeframe.

8.121 The tables demonstrate that Daventry has only 6ha which is likely to come forward straight away, although around 30% could come forward in up to 3 years time. The majority of employment development is expected to come forward in 4-6 years time as a result of the development of the national distribution parks in the north west of the District.

Table 8.70 – Potential Timeframe for Delivery - Daventry

Site Ref No.	Site Name	Total area for employment (ha)	Immediate	Within 1 year	1-3 years	4-6 years	7-10 years	10+ years
D20	Manor Business Park	5.5	X					
D33	Daventry Town Centre Site 4G	0.7	X					
D14	Whilton Mill	0.5		X				
D21	Former Midland Meat Packers Ltd	38.7		X				
D1	DIRFT Expansion Site	54.0			X			
D2	Apex Park, Daventry	35.0			X			
D6	Danetree Phase 1 (Burnt Walls)	10.0			X			
D10	Browns Road	3.2			X			
D12	Church Fields	2.0			X			
D15	Foxhill Farm	0.9			X			
D16	Filbert Lodge	13.8			X			
D17	Dodford Minerals Site	25.0			X			
D22	Heartlands Phase 2	1.6			X			
D23	Holly Lodge Drive	5.2			X			
D26	Daventry Town Centre Phase 5 South	1.0			X			
D27	Daventry Town Centre Site 3	1.5			X			
D28	Long March, Daventry	4.0			X			
D29	Pitsford Centre	4.0			X			
D31	Land adjacent to M1 J18 north and west of Holiday Inn Hotel, Crick	11.7			X			
D4	Rugby Radio Station	210.0				X		
D5	Ilmor Way, Brixworth	6.2				X		
D7	Boughton Road, Moulton	7.2				X		
D11	Station Road, Long Buckby	9.6				X		
D13	Portly Ford Farm	28.0				X		
D19	Round Hill	45.0				X		
D24	Manor Park Business Park Extension	1.0				X		
D25	Weedon Royal Ordnance Depot and Magazine Store	9.2				X		
D30	Overstone Leys	10.0				X		
D32	Daventry Town Centre Site 2	0.6					X	
D34	Land at Yelvertoft Road	29.0					X	

D35	Land at A428 West of M1 at J18 Crick	43.5					X	
D3	Nortoft Lane, Kilsby	48.0						X
D8	Drayton Gate Farm	31.0						X

Table 8.71 – Summary of Potential Timeframe for Delivery - Daventry

Timeframe for Delivery	Area (ha)	%
Immediate	6.2	0.9
Within 1 year	39.2	5.6
1-3 years	172.9	24.8
4-6 years	326.2	46.8
7-10 years	73.1	10.5
10+ years	79.0	11.3
Total	696.6	100.0

Daventry Summary

8.122 Daventry has around 697ha of land which may be suitable for employment development up to 2031, which is one of the largest amounts of land assessed of all the local authorities. However, it is estimated that around 86% of this land is constrained by a variety of factors.

8.123 A very large proportion of the land assessed within Daventry is located around the north west of the District, close to the M1 and DIRFT. It is expected that this location could accommodate a significant amount of growth in the national distribution market, although most of it is not likely to serve the local needs of Daventry or Northampton as a whole.

8.124 Daventry also has a number of town centre sites which should be prioritised for office development. There are also opportunities for general industrial and sub-regional and local distribution floorspace at Apex Park and towards the south east of the town centre. The District also has a number of smaller sites in rural locations which could serve local needs.

8.125 The historic Weedon Ordnance Depot has been considered within the SELA as the site has both commercial B1/ B2 and B8 and wider, predominantly Non B space visitor destination attraction, development potential. Based on the assessment of the SELA and consultation with public partners, it is recommended that the site is taken forward as visitor destination, which may include some small offices/ workshops linked to a predominantly non B development. Such development should seek to build on the sites unique heritage and support the wider destination management activity to promote Northamptonshire as a place to visit. There a re a number of examples of similar developments, such as Snape Maltings, which include minor B use as part of wider schemes

8.126 Following the closure of the Daventry Appeals Process on the 23rd September 2009, it is possible that a review of options within the South East area of Daventry (The Marches/ Burnt Walls area) there could be flexibility to increase the area available for employment land when detailed masterplanning is carried out.

8.127 In summary, it appears that Daventry will have sufficient land of appropriate quality to meet the projected demand for employment uses, as long as site-specific constraints at each site can be resolved.

9. Demand-Supply Balance

Introduction

9.1 This Section draws together the demand (Section 6) and supply side (Section 8) estimates and presents the net balance (shortfall or surplus) in potential supply at 2026 and 2031 for both North and West Northamptonshire which represent the most appropriate functional spatial units used to analyse this information. However, indicative net balance estimates for individual districts and boroughs are set out in Appendix G. Also provided in Appendix F is a summary of the potential capacity of site without planning constraints (i.e. allocated, with planning permission or allocated in principle).

9.2 As highlighted in Section 5, estimates of actual take-up of floorspace since the beginning of the forecast period (2001-2008) has been sourced from the Valuation Office (Commercial and Industrial Floorspace and Rateable Value Statistics, 2008). Whilst changes in data collection and assessment methodologies made in 2005 implies that time-series analysis should be undertaken with a degree of caution, the Valuation Office (VO) data provides the most reliable single and common source for estimating floorspace take-up over time in Northamptonshire. Consequently, in the absence of commonly gathered monitoring information since 2001, the VO data provides the best opportunity for measuring general trends of commercial and industrial development in the county.

9.3 The demand estimates are taken from the preferred economic scenario set out in Section 6 of this report. The supply capacity estimates build on the analysis contained in Section 8. In order to calculate the theoretical net balance between demand and potential supply, the latter is based on our analysis of all identified sites currently in the planning system. Each site has been classified as being of relatively high quality or poorer quality in accordance with the site appraisal process described in Section 8. Whilst the demand-supply balance tables to not consider sites which currently are not in the planning system, their potential capacity by overall quality is summarised tables contained in Appendix G.

Existing Supply

9.4 Drawing on the findings presented in Section 8 and Appendix E, Tables 9.1 and 9.2 summarise the existing and potential supply in North and West Northamptonshire. As explained in Section 8, it is important to note that these theoretical supply estimates are based on:

- Plot ratio assumptions applied in order to estimate the potential development capacity by B-use sector as highlighted in Appendix C.
- Sites currently with no major planning constraints (i.e. allocated or allocated in principle); and
- The Categorisation of sites' quality taking into consideration market viability, ownership, sustainability, deliverability and other major constraints.

9.5 Tables 9.1 and 9.2 summarise the potential capacity of all sites identified in Section 8. These capacity assessments are categorised according to whether or not a strong planning status is evident ('unconstrained' and 'constrained'). For each category of site, a composite assessment of quality has been undertaken and measured and summarised into two categories ('high quality' and 'poorer' quality) as described above and in Section 8.

Table 9.1 – Gross Existing and Potential Supply Capacity – North Northamptonshire

	Office (sqm)	Industrial (sqm)	Distribution (sqm)
Constrained Land	**1,314,756**	**2,689,514**	**2,057,110**
High Quality	326,971	643,741	589,639
Poorer Quality	987,785	2,045,773	1,467,472
Unconstrained Land	**118,036**	**319,237**	**85,070**
High Quality	98,436	159,603	40,496
Poorer Quality	19,600	159,634	44,574
Total	**1,432,791**	**3,008,751**	**2,142,180**

Table 9.2 - Gross Existing and Potential Supply Capacity – West Northamptonshire

	Office (sqm)	Industrial (sqm)	Distribution (sqm)
Constrained Land	**879,134**	**1,283,638**	**1,765,749**
High Quality	225,993	107,643	941,747
Poorer Quality	653,141	1,175,995	824,003
Unconstrained Land	**188,467**	**228,787**	**357,623**
High Quality	173,507	193,123	353,623
Poorer Quality	14,960	35,664	4,000
Total	**1,067,601**	**1,512,425**	**2,123,372**

9.6 The tables demonstrate that although there appears to be significant capacity for a range of employment floorspace types in both the West and the North, a large proportion of this potential floorspace is located on constrained and/or poor quality sites which were considered to be not particularly likely to come forward for development (due to existing constraints or weak market demand for a particular location or proposal). This is especially the case in the North, where the potential for over 5 million sq.m of employment floorspace is located on sites with are not currently allocated therefore unavailable in the short-term for development.

9.7 It should be noted that this does not necessarily mean that these sites will definitely not come forward for employment development. The potential capacity of employment development at these sites remains, subject to the resolution of identified constraints.

Net Balance

9.8 Tables 9.3 and 9.4 set out the net balance between demand and existing / potential supply at 2026 and 2031 for North and West Northamptonshire. Appendix G sets out the equivalent findings by district / borough. The quantitative analysis has only been undertaken having regard to sites which are unconstrained in planning terms and categorised in terms of their composite quality and suitability for employment.

North Northamptonshire

9.9 Table 9.3 shows that in North Northamptonshire, there is a significant net shortfall of existing unconstrained capacity for offices and industrial under the two supply estimates. There is also limited capacity for warehousing development, particularly up to 2031. Moreover, it is important to highlight that the capacity assessments to not make an allowance for choice and flexibility in the supply of sites to meet the future needs of county.

9.10 In order to meet the identified shortfall in offices and warehousing, a significant quantity of good quality land will need to be identified and brought forward for development. Our initial recommendations regarding which key sites should be considered and tested through the planning process for primarily employment purposes as a matter of urgency are provided in Section 10 of this report

Table 9.3 – Demand-Supply Balance: North Northamptonshire (sqm)

	Offices (sqm)	Industrial (sqm)	Warehousing (sqm)	Total (sqm)
Demand 2001-2026	390,312	84,630	764,456	1,239,398
Demand 2001-2031	468,374	101,556	917,347	1,487,278
Take up 01-08	30,000	-160,000	792,000	662,000
NET demand 08-2026	360,312	244,630	-27,544	577,398
Net demand 08-2031	438,374	261,556	125,347	825,277
High quality supply without planning or other major constraints	98,436	159,603	40,496	298,534
Net Balance to 2026	261,877	85,027	-68,040	278,864
Net Balance to 2031	339,939	101,953	84,852	526,744
Total high quality supply from all sites assessed (regardless of constraints)	425,406	803,344	630,134	1,858,884
Net Balance to 2026	-65,094	-558,714	-657,678	-1,281,486
Net Balance to 2031	12,968	-541,788	-504,787	-1,033,607

West Northamptonshire

9.11 For West Northamptonshire, Table 9.4 demonstrates a similar pattern to that in North Northamptonshire in terms of offices. In other words, the sector demonstrates is a significant net shortfall of existing unconstrained supply capacity before any consideration is given to the need for choice, flexibility and risk. Whilst theoretically, forecast demand for warehousing has already been met largely by take-up since 2001, there is an underlying need to ensure that future plans for expanding employment in the area is not constrained to the extent that a large proportion of latent market demand is 'pushed' away from the county. This is particularly important for key distributions locations in the area such as Daventry (DIRFT) where significant, sustainable opportunities for future growth remain. Moreover, it is critical to emphasise that the capacity summaries presented in the tables assume a 'best-case scenario' whereby all available, unconstrained sites are made available for development. In reality, this will not be the case for a variety of unforeseen reasons: this reinforces the need to plan for choice and flexibility through the provision of a greater amount of land and floorspace over and above the future estimates of actual demand.

9.12 As for the North, a significant quantity of good quality land will need to be identified and brought forward for development in order to meet projected office and warehousing needs. Our initial recommendations regarding which key sites should be considered and tested through the planning process for primarily employment purposes as a matter of urgency are provided in Section 10 of this report.

Table 9.4 - Demand-Supply Balance: West Northamptonshire (sqm)

	Offices (sqm)	Industrial (sqm)	Warehousing (sqm)	Total (sqm)
Demand 2001-2026	459,468	-102,550	855,888	1,212,806
Demand 2001-2031	551,362	-123,060	1,027,066	1,455,367
Take up 01-08	17,000	-140,000	679,000	556,000
NET demand 08-2026	442,468	37,450	176,888	656,806
Net demand 08-2031	534,362	16,940	348,066	899,367
High quality supply without planning or other major constraints	173,507	193,123	353,623	720,252
Net Balance to 2026	268,961	-155,673	-176,735	-63,446
Net Balance to 2031	360,855	-176,183	-5,557	179,115
Total high quality supply from all sites assessed (regardless of constraints)	399,500	300,765	1,295,369	1,995,635
Net Balance to 2026	42,968	-263,315	-1,118,481	-1,338,829
Net Balance to 2031	134,862	-283,825	-947,303	-1,096,268

9.13 The industrial balance in the West appears health according to Table 9.4 but evidence from the marketplace indicates this is far from the reality. The decline in manufacturing jobs has been more rapid than anticipated. A large element of the manufacturing is in dated buildings, the majority of which are approaching 30 years old and obsolescence is becoming a real issue and the speed of decline is likely to increase further.

9.14 An assumption that no new, modern industrial sites are require would represent an important economic challenge when there are a number of manufacturing operators who are looking to invest in Northamptonshire and a number of large scale employers already based in the area are unable to invest in their businesses because of a lack of supply of modern, suitable land and buildings. Consequently, in planning to meet the needs of industrial occupiers and investors, it is critical that the quantitative balance between demand and supply does not detract from day-to-day practical site and premises problems facing existing and potential industrial businesses.

9.15 In conclusion, the above analysis demonstrates that both the North and the West have insufficient, good quality, unconstrained supply capacity to provide for projected demand for office floorspace. The supply of available, good quality industrial land in the North is also limited. Given the high level of take-up of warehousing space in recent years, a high proportion of forecast demand has already been satisfied. However, this may indicate that future estimates of warehousing demand are below market requirements especially when consideration is given to the need for the County to accommodate an element of national demand at strategic distribution sites. Consequently, in pursuing a balanced role in the distribution and warehousing market, additional land for this use will need to be made in Northamptonshire.

10. Conclusions & Recommendations

Introduction

10.1 This Section sets out the key strategic conclusions and recommendations which have emerged from the SELA work. These have not only been drawn on the technical analysis undertaken in accordance with the brief but also take into consideration the findings from the consultation process, including public and private sector workshops.

10.2 The following key issues are considered in this section:

- Strategic Policy considerations;
- Scenario testing and the preferred option for growth;
- Future property market prospects in light of the preferred growth scenario;
- Spatial priorities and potential locations for achieving the preferred growth scenario;
- Supply-side response required to deliver the preferred growth scenario; and
- Key delivery mechanisms.

Strategic Policy Considerations

Flexibility and Choice

10.3 The recently issued consultation paper on PPS4 strongly emphasises the need for local authorities to take a proactive and flexible approach to planning for economic development. This is important to ensure that local authorities can respond quickly and efficiently to changing business needs. Given Northamptonshire's role as a growth area and the need to achieve ambitious employment and housing development targets, we consider that the need for flexibility and a proactive planning approach is absolutely vital if the county is to fulfil its contribution to the growth agenda. Moreover, such an approach is equally important if adopted and other endorsed strategies in the county are to be realised. This includes key elements of the East Midlands Plan, SNEAP, the North Northamptonshire Core Strategy DPD and other strategic documents such as the Northampton Economic Regeneration Strategy.

10.4 Central to ensuring maximum flexibility and delivering optimal attractiveness to the market, we consider that employment land / floorspace requirements are articulated at the sub-regional level. As part of this study, we have undertaken an analysis to identify the main functional economic areas in the county. This has been provided in light of the constraints imposed when planning for economic development based on administrative boundaries. Indeed, in terms of Government policy and ELR guidance, there exists a strong policy push to plan for economic development more in terms of functional economic areas rather than necessarily, administrative units. For example:

- Draft PPS4 states that many economic markets operate at the sub-regional level, are not consistent with local authority administrative boundaries, and in some areas cross regional boundaries. To plan effectively for these markets, regional planning bodies and local planning authorities should work together on a sub-regional basis.
- The Government's Guidance Note on Employment Land Reviews states that the principal difficulties faced by local planning authorities undertaking employment land reviews, especially at the district level, include building a meaningful picture of employment demand and supply. (There are two underlying problems: labour and property markets extending across district boundaries and the limitations of small area projections particularly over the time horizons required for development plans). It goes on to state that this reinforces the

need for regional and sub-regional analyses, interpreted locally, to provide a sound basis for policy and to identify a balanced portfolio of employment sites. The geography of local commercial property markets and employment has to be considered in two ways:

- the most appropriate boundaries for any aggregate analysis of demand and supply. For reasons of practicality, these are usually defined as functional areas (for example based on travel to work areas) with sub-areas which can be aggregated to local authority boundaries; and
- the locational and premises requirements of particular types of business and the extent to which one location can meet the needs of a mix of types of business.

10.5 Consequently, we consider that the primary geographical units used to display estimated future demand / need for employment land and floorspace and the supply response should be articulated at a level which makes sense in functional terms. In order to ensure that these functional areas can be translated into administrative areas, we recommend that the demand and supply estimates are provided primarily for North Northamptonshire and West Northamptonshire. This geographical level provides a reasonable basis on which to plan for economic development and reflects the strategic economic / market context as well as an aggregate of local authority areas. Planning for employment land supply on this basis also brings with it the benefit of providing the market with more flexibility than would be the case if relying purely on demand and supply targets based on local authority boundaries.

10.6 We consider that the final SELA report presents demand and supply requirements on the basis of the two Housing Market Areas, of West and North Northamptonshire, with indicative but flexible estimates provided for individual local authorities (as provided in this draft report). This will be important to ensure that the supply of land and premises can be more responsive to occupier and investor requirements and that potential delays to the provision of good quality sites created by rigid local-authority based employment land allocations can be avoided.

10.7 Draft PPS4 emphasises the need for local authorities to allocate a range of sites and to plan for a broad range of business types. It emphasises the importance of avoiding automatic allocation of sites from one development plan to the next. Where there is no reasonable prospect of such sites been taken up for their intended use, local authorities should consider de-allocation from employment. In Northamptonshire, realistic and market focused site allocations should be at the core of employment land policies to be developed as part of the North and West LDFs.

Rural Economic Development

10.8 Whilst the SELA is a strategic study with many of the key sites considered being relatively large scale and located either within or adjacent to the county's main settlements, it is important for employment land policies in Northamptonshire to have regard to rural economic needs. Draft PPS4 and the East Midlands Plan highlight that most employment generating activities in rural areas should be located in local service centres. This principle should be reflected in the Core Strategies and relevant Development Plan Documents. However, when planning for provision of rural enterprise activities, and in the flavour of draft PPS4, it is essential that policies are sufficiently flexible to allow for variations in local circumstances and to reflect the diverse nature of rural towns and villages.

10.9 In providing a healthy balance of employment across the county, we consider that the provision of new employment uses in rural areas should be encouraged so long as they support local needs at a scale commensurate with the character and environment of the area in question. Particular emphasis should be given to the promotion of sustainable sites in the centre of rural towns and, in some cases, villages. Indeed, given potential viability constraints in bringing forward or redeveloping sites in rural town and village centres, there is likely to be the need for public sector intervention in a significant number of cases. Consequently, regeneration funding for bringing forward suitable employment sites in rural areas should be made available at the earliest opportunity. This may take the form of a bespoke programme aimed at facilitating rural enterprise in Northamptonshire.

10.10 In order to manage the provision and development of employment uses in rural Northamptonshire, a criteria-based approach to determining proposals is recommended. This reflects government guidance set out in PPS7 and emerging PPS4. Based on a policy principle of encouraging sustainable economic diversification and rural enterprise, we consider that the following factors should be used to define the criteria in rural areas in the county:

(i) Presumption in favour of maximising the re-use / conversion of existing buildings in the countryside. Proposals for new development should demonstrate that no disused buildings are available within a reasonable catchment area (subject to factors of viability).

(ii) Need for social and/or economic investment to sustain the local economy including the retention of existing employment. This should be based on a local authority-led definition and assessment of need reflecting a thorough analysis of local socio-economic conditions including: amount and extent of unemployment / deprivation; patterns of in/out commuting; and economic health of village centres. The LDF could identify priority areas based on this analysis where rural enterprise is particularly required to meet need (but not to the exclusion of all other areas). Applicants should be encouraged to demonstrate the positive socio-economic impact of development proposals relative to identified priorities.

(iii) Demonstrable social or economic need for proposals to be located in the countryside relative to an urban location (e.g. access to a specific market, raw material or particular labour force);

(iv) Definition of a size threshold to guide the scale of development (e.g. maximum 200m²). Development or occupation of floorspace in excess of this threshold should be subject to a more rigorous demonstration of need for the particular scheme.

(v) No adverse impact on the character or environment of the rural area (as defined by the assessment of rural need and priorities). Proposals which provide a net benefit to the environment should be promoted (e.g. reduction in out-commuting).

(vi) Demonstrate that traffic generation from the scheme can be accommodated by the existing or planned local road system. Also ensure that access arrangements are acceptable for the scale and type of development.

(vii) Safeguard the employment function of the development from other uses through planning conditions/planning gain mechanisms.

10.11 National and regional policy guidance supports the development of healthy rural economies. However, it is emphasises that economic development in rural areas should be focused on local service centres and diversification of rural economies should be encouraged whilst having regard to scale and environmental impact. PPS7 states that local authorities should apply a criteria-based approach to assessing development proposals in rural areas.

Geographical Priorities

10.12 As a Principal Urban Area, the East Midlands Plan highlights the importance of Northampton's role in driving growth in the County through both housing and employment development. This should be complemented by enhancement of public transport infrastructure and facilities. The tightness of the town's boundaries requires that a strategic and coordinated approach needs to be taken to the planning and delivery of this longer term growth. Again, this emphasises the particular need in Northamptonshire for a flexible and proactive approach to planning for economic development and avoidance of unnecessary constraints presented to the market by rigid adherence of land supply policies in accordance with administrative boundaries.

10.13 Particular focus must be given to the Central Area, as noted in MKSM policy. To ensure it is able to provide a range of employment opportunities with a particular emphasis on offices, through the provision of large office space through to small office suites in both new and converted document. This must also reflect the differing performance of B space and Non B space development, and it will be equally as important to provide an appropriate supply of Non B space sites to support the wider role of the town in attracting leisure, retail and cultural services,

10.14 The Regional Plan stresses that the regeneration of the Growth Town of Corby should be supported by a level of housing development that will significantly reduce the need for in-commuting. As Growth Towns, the development roles of Kettering and Wellingborough will also be significantly enhanced as will Daventry's role as a Sub-Regional Centre.

10.15 Once more reflecting the importance of flexibility and choice, the Plan also emphasises the importance of employment allocations being responsive to market needs and the requirements of potential investors (including small businesses). These allocations should also provide for the needs of priority sectors identified in the Regional Economic Strategy and provide a catalyst for the regeneration of urban areas.

10.16 The adopted Core Strategy in North Northamptonshire has established the spatial vision for the development of this part of the county. This strategy is significant in taking forward key aspects of the East Midlands Plan in North Northamptonshire. It plans for growth through the development of a strong network of settlements linked by good transport connections and emphasises the importance of matching housing growth with economic growth. The direction of the North Northamptonshire Core Strategy has been reflected in this study.

Strategic Distribution

10.17 Policy 21 of the RSS establishes the potential for the provision of strategic distribution sites in Northamptonshire during the plan period. It highlights that the preferred locations for these would be one each in North and West Northamptonshire. Having evaluated all major existing and potential sites in the county which potentially may serve this function and given the importance of maximising rail freight opportunities, we consider that the most suitable sites (in terms of both sustainability and viability) to be planed extensions to:

- DIRFT, Daventry (West Northamptonshire); and
- Eurohub, Corby (North Northamptonshire).

10.18 Development at these locations must be inline with the policy guidance as highlighted in Policy 21 of the Regional Spatial Strategy. Furthermore public transport connectivity to the site should be maximised, through existing and new transportation infrastructure to maximise the potential jobs growth within the county's labour market.

Scenario Testing and the Preferred Option for Growth

10.19 As part of this study, we have comprehensively assessed a variety of options for employment growth in Northamptonshire. These scenarios are summarised in Table 10.1 which shows a significant variation in potential employment growth options in the county.

10.20 During the study, consultations with the North and West JPUs were conducted in order to identify a preferred scenario which should be established for future planning purposes. Given that the SNEAP preferred economic scenario has already been widely accepted in both North and West Northamptonshire, it was concluded that the most ambitious, policy-based scenario should be pursued as the preferred SELA scenario. This reflects key objectives of ensuring that housing growth in Northamptonshire is matched by growth in employment. Table 10.2 sets out the jobs growth implications of this scenario whilst Table 10.3 defines the B-use floorspace requirements associated with the scenario.

Table 10.1 – Employment Growth Scenarios 2001-2031

	Northamptonshire	North Northamptonshire	West Northamptonshire
Dwelling Led Scenario (Optimal Completion Rates)	118,163	61,718	56,445
Tempro Update	129,500	47,783	81,505
Tempro Update accounting for Recession, assuming 2.3% (3.7%) fall in employment 2009	112,220	41,025	71,195
Policy Led – Preferred SNEAP Scenario	132,200 (2026) 158,684 (if rolled forward to 2031)	64,100 (2026) 76,942 (if rolled forward to 2031)	68,100 (2026) 81,742 (if rolled forward to 2031)
MKSM	141,000	79,000	62,000

Table 10.2 – Preferred Employment Growth Scenario 2001-2031

	2001-26	2001-31
North Northamptonshire		
Industrial	2,418	2,902
Warehousing	8,687	10,424
Off ice	21,684	26,021
B Space Jobs	32,788	39,346
Non B Jobs	31,330	37,596
All Jobs	64,118	76,942
% of B Space Jobs	*51.1*	*51.1*
West Northamptonshire		
Industrial	-2,930	-3,516
Warehousing	9,726	11,671
Off ice	25,526	30,631
B Space Jobs	32,322	38,786
Non B Jobs	35,797	42,956
All Jobs	68,119	81,743
% of B Space Jobs	*47.4*	*47.4*
Northamptonshire		
Industrial	-512	-614
Warehousing	18,412	22,094
Off ice	47,210	56,652
B Space Jobs	65,110	78,132
Non B Jobs	67,126	80,551
All Jobs	132,237	158,684
% of B Space Jobs	*49.24*	*49.2*

Table 10.3 – Preferred Scenario - Gross B-Use Floorspace Requirements

	2001-26	2001-31
North Northamptonshire		
Industrial	84,630	101,556
Warehousing	764,456	917,347
Off ice	390,312	468,374
Total B Floorspace	1,239,398	1,487,278
West Northamptonshire		
Industrial	-102,550	-123,060
Warehousing	855,888	1,027,066
Off ice	459,468	551,362
Total B Floorspace	1,212,806	1,455,367
Northamptonshire		
Industrial	-17,920	-21,504
Warehousing	1,620,344	1,944,413
Off ice	849,780	1,019,736
Total B Floorspace	**2,452,204**	**2,942,645**

10.21 It is critical to highlight that the preferred growth scenario represents an aspirational, preferred economic growth position, seeking to balance housing and employment growth in a sustainable manner. The evidence shows that trend-based econometric models indicate that 'business as usual' will result in these targets not being met. Indeed, building in the potential effects of the present economic recession, the challenge to meet the MKSM / SNEAP aspirations becomes more acute. Moreover, the dwellings/population-based model also indicates that, failure to meet the housing growth targets, will impact significantly on future workforce supply. Constraints in the supply of labour in the future will have a dampening effect on the county's capacity to generate additional jobs.

10.22 Consequently, in pursuing the preferred 'policy scenario', a significant step-change will be required to deliver the required amount and type of employment growth. To achieve this, critical factors must be met which will be central to attracting significant inward investment and facilitating the expansion and diversification of existing businesses: These factors include:

- an increase in population / active workforce through attractive housing delivery programmes;
- an increase in availability of quality new employment sites for targeted sectors and clusters;
- investment in the county's skills capacity;
- timely provision of social infrastructure required to support growth;
- up-front investment in core infrastructure (roads, junctions, rail facilities, broadband/optic fibre networks);
- renovated town centres;

- high quality leisure and green infrastructure to support a good quality of life;
- hard hitting branding and promoting at a strategic geographical level which embraces cross-boundary consistency in the county. It will be critical for Northamptonshire to distinguish itself from competing locations in surround areas such as Milton Keynes, Aylesbury, Derby, Leicester, and Nottingham. Branding and promotion should build on recent successful initiatives such as the 'Let Yourself Grow' theme.

10.23 It is not the purpose of SELA to address all of the above key critical success factors. Primarily it is concerned with:

- Identifying an appropriate portfolio of good quality, viable employment sites that can facilitate timely employment growth across the county.
- Identifying the scope for a viable and enhanced employment role of town centres through the identification of key site development opportunities.
- Recommending key actions and requirements for the public sector to maximise its enabling role through strong policies and targeted intervention.

10.24 In addition to achieving the desired scale of employment growth in the county, and as already highlighted, it will be critical for LDFs to provide sufficient choice and flexibility in the supply of employment land and floorspace. This will be critical to ensuring that the right type of jobs are created in the right place and in accordance with spatial requirements in the county. To do this, it will be necessary to:

- Identify a sufficient number of viable and deliverable good quality employment sites across the county with the capacity to provide over and above future estimated job requirements. Provision of at least 5 years forecast supply at any one time is recommended.
- Allocate a range of new, market-focused sites in order to provide a viable collection of deliverable employment sites. Our recommendations for which are set out later in this Section.
- Promote a strong policy approach to the safeguarding of existing, viable employment land and prevention of loss to other uses. Exceptions to this principle should be supported by evidence that the need for alternative uses clearly outweighs existing and future employment needs. When release of employment sites to non B-use activities is being considered, other employment generating uses (non B-use) should be prioritised subject to other planning policy considerations.
- Provide a more refined structure for defining the type and role of different employment sites which can be applied in the Core Strategies and relevant DPDs. This will include:
    - a bespoke employment site typology which enables a greater degree of flexibility for sites to be considered for a range of B uses. The recommended typology is provided in Appendix G;
    - greater flexibility for including some appropriate non B-use activities on employment sites. This should be permitted where the introduction of non B-use jobs at employment sites assist in ensuring the viability and deliverability of sites.
    - recommendations for the identification of key strategic and priority sites;
    - the identification of key sites with sector-specific strengths and opportunities; and
    - recommendations for the growth and role of identified strategic logistics sites, with a particular consideration for international national facilities at DIRFT and Eurohub expansion.

- Provide recommendations for intervention, development-enabling measures and accelerating delivery (see below).

B-Use / Non B-Use Balance

10.25 As an employment land study, SELA's primary focus relates to identifying the demand / need for and supply of B use land and floorspace. However, the SELA has a role to provide strategic recommendations regarding how the county should plan for overall employment growth.

10.26 The findings set out in this report indicate that, to date, the county has not met annualised MKSM total employment growth targets (particularly in the North). However, on closer examination, performance within the B-use sector has been much stronger compared to non B-use jobs growth. Indeed, growth of B-use jobs in Northamptonshire significantly out-performs the regional and national averages.

10.27 Whilst statistical limitations, including SIC conversion to b space and differing ABI base years, may be responsible for exaggerating the apparent growth of B-use jobs, the general scale of change is significant. Indeed, results from the trend-based econometric models indicate that prospects for enhanced rates of growth in B-use jobs in the county are good.

10.28 Consequently, an important policy consideration will be whether or not to plan for a more prominent role for B-use activities in meeting the preferred growth scenario. Evidence presented earlier in this report suggests that the county's non B-use sectors (e.g. including but not exclusively retail, hotels, leisure and food and drink, social care and health, education and non residential institutions) are lagging behind regional and national trends. This requires a significant shift in policy initiatives for Northamptonshire, including strong and effective policies which will drive forward key and wider town centre regeneration proposals within the Northampton Central Area and town centres within the district and boroughs of Northamptonshire. Whilst it is not the role of SELA to provide detailed advice on planning for non B-use jobs, it will be appropriate for LDF policies and site allocations to consider:

- incorporating an appropriate scale and type of non B-use activities in 'traditional' employment (B-use) sites;
- combining in a viable manner, B and non B-uses in town centre masterplans and development briefs with a particular focus on how the county's town centre regeneration activities can support jobs growth and
- complementary initiative aimed at investing in skills and training in lagging sectors.

10.29 To support the development of Non B class uses, it is recommended that a county wide working group is developed to consider the reasons for disparities in performance within this sector and possible solutions. This working group should operate on a task and finish basis, consisting initially of planning and economic development officers to reflect the emerging planning and economic development priorities for the county. Business sector input and, if required, professional support should be sought as and when needed to identify effective activities to stimulating the demand for and jobs growth in non B use sectors.

Spatial Priorities for Growth

10.30 In accordance with established spatial priorities in the county and the thrust of existing policy, it is important that LDFs aim to promote employment (and housing) growth according to the following hierarchy of locations. Given Northamptonshire's strategic role as a Growth Area, this hierarchy of areas should be reflected by public investment in key infrastructure and other facilities to ensure the respective roles of the county's settlements can be maintained and enhanced:

- Principal Urban Area – Northampton Implementation Area (i.e. functional area of Northampton). The county town currently has a population of around 200,000 with MKSM / SNEAP aspirations to grow to approximately 300,000 over the next 20 years.
- Growth Towns – Corby; Kettering; Wellingborough. Each of the towns have populations of between 60,000 – 75,000 with expansion targets of around 100,000.
- Sub-Regional Centres (*or equivalent*) – Daventry, with a population of around 25,000 should roughly double over the next 20 years. The unique role of DIRFT should be distinguished from the wider economic role of the district and Daventry town. Rushden could also be considered a sub-regional centre which complements Wellingborough as a Growth Town. The town also has set out a masterplan which demonstrates its potential to perform an increasing employment role in the county.
- Smaller Towns – Burton Latimer; Rothwell; Desborough; Irthlingborough; Higham Ferrers; Towcester. Promotion of economic growth at a sustainable scale, primarily through regeneration of the town centres and, smaller scale urban extension
- Rural Service Centres – Brackley; Oundle; Thrapston; Raunds (*each c. 10,000*). Focus on town centre regeneration and in some cases, the promotion of key, significant and viable employment sites as part of smaller scale urban extensions.
- Sector Specific Locations - (e.g. Motorsport) – Silverstone; Rockingham; Brixworth. Where significant sector-specific opportunities are apparent, these will be promoted for growth through the identification of good quality, viable employment sites that meet specific sector needs in key locations.
- Road/Rail Transfer Hubs / – Promoting strategic logistics hubs in sustainable locations, most notably Daventry International Rail Freight Terminal (DIRFT) and Eurohub, Corby.
- Passenger Rail Stations – Promoting higher density, mixed-use development in sustainable, town centre locations. Critical to this will be the need for strong forms of intervention and co-ordinated action. Key locations may include Northampton, Corby, Kettering, Wellingborough, Long Buckby and Kings Sutton.

10.31 Smaller scale but potentially significant employment sites have been identified at Burton Latimer, Irthlingborough, Oundle and Rothwell, all within the North Northamptonshire area. Employment development in these towns is expected to be delivered as part of the overall development strategies in the adopted Core Strategy, to maintain a balance between new housing and jobs and to diversify the local economic base.

Locations for Employment Growth

10.32 Planning policy clearly states that town centre sites should be the preferred location for employment development, especially office-based development, as town centre sites are usually the most accessible and have the greatest potential to enable commuting trips to be made by non-car modes. However, in light of the need to support a range of differing uses, and business sectors, additional locations for growth will need to be identified. These locations must seek to maximise the principles of sustainable development, in terms of minimising environmental impact, maximising accessibility and being attractive to the market.

10.33 The analysis below considers the existing employment sites within the County, in addition to other sites identified through the SELA call for site submissions process from a market suitability and sustainability perspective. From this analysis broad locations for employment growth have been identified for each settlement within the County.

10.34 It is critical that any new locations for growth are aligned to wider spatial planning policies as set out in the Core Spatial Strategies. In most cases these will be in Sustainable Urban Extensions (SUE). Employment within the Sustainable Urban Extensions is a key policy objective of both the

Regional Plan, and is taken forward as a key element of the North Northamptonshire CSS. Furthermore, given that the SUEs being promoted in North Northamptonshire are predominantly owned/promoted by a limited number of developers, they have greater control over the phasing of employment development within the SUE, and therefore this may counter the viability issues are referred to elsewhere in this report.

10.35 Recognising this, in certain circumstances sites will be needed in addition to these, to meet market and business specific needs.

Corby

10.36 Much of the existing employment land in Corby is located towards the north and east of the town in Saint James, Weldon, Willowbrook East and Earlstrees Industrial Estates. This area is a well established location for general industrial businesses and has a significant critical mass of employers within the manufacturing and distribution sectors which suggests that the area is likely to remain attractive to such businesses in the future. Much of the land which has potential for employment development within Corby is also located towards the east and north east of the town, a significant proportion of which is located on brownfield sites. Furthermore, there are plans to construct a new road link which connects the A6003 with the A43, which would improve connectivity with the eastern side of the town, as well as greater highway capacity. The new railway station is also closer to the north and east of the town, with the potential to link major distribution proposals into the national rail network.

10.37 As a result, the logical strategic direction for general industrial and distribution-based employment growth in Corby would be towards the east and north east of the town. These locations represent opportunities to build on the already strong industrial and distribution base in the town, utilise brownfield sites and potentially take advantage of opportunities offered by the railway.

10.38 There are also proposals to develop an urban extension towards the west of the town. It will be important that these proposals include an element of employment space to serve the new community and limit the number of commuting trips across town.

10.39 Whilst we recommend that the east and north east of the town would be most suitable strategic options for general industrial and distribution employment, the town centre will be the most suitable location for office-based employment development. Large and medium-scale office proposals should be directed towards the town centre, particularly the area between the town centre and the new railway station, as identified within the Corby Central Masterplan.

Kettering

10.40 The sites identified with significant potential for employment development in Kettering are largely located around junctions 7, 8, 9 and 10 of the A14. These locations provide key opportunities for distribution and general industrial development. The site at Kettering South (K1) could become particularly attractive if the Wellingborough – Kettering bypass is completed, which would link in to junction 9 of the A14, whilst Cransley Park (K6), at junction 7, is viewed as one of the best employment sites in North Northamptonshire .

10.41 Whilst these locations are seen as particularly attractive from a market perspective, effective public transport links to these sites would be critical in order to reduce commuting journeys and improve their sustainability.

10.42 The Station Quarter site provides one of the few opportunities to develop town centre offices in Kettering. Proposals for office development should be located within this central area wherever possible. However, it may also be necessary to provide a business park environment for office and other research and development-based businesses if there is clear demand for such a facility. Again, there are a number of suitable locations for such a facility at the junctions on the A14.

10.43 The proposed urban extension at Kettering East should also provide employment opportunities to serve it’s resident population. The south of the site, close to junction 10, would be the most suitable location within the urban extension for a mix of general industrial, distribution and possibly some office uses.

10.44 In summary, the strategy for employment growth within Kettering should be to locate employment uses, especially office-based businesses, within the town centre wherever possible, but to also create a number of good quality business parks to accommodate a range of employment types located close to the major junctions on the A14. These would come forward subject to resolving access and other wider infrastructure constraints.

Desborough

10.45 Land which may be able to support employment development has been identified to the north west of the town at 32K, Desborough North and 33K, Land Adjoining Braybrooke Road, however it is recognised that this development is not consistent with the policy framework for North Northamptonshire or the policies emerging from the Rothwell & Desborough Urban Extension Area Action Plan. Both of these locations have good access onto the A6.

10.46 With the majority of the general industrial and distribution uses located at Magnetic Park, to the north of the town, and with land available there for development, this is likely to be the preferred location for employment development in the short term.

10.47 In addition, the town centre sites at 35K, the former bus depot, and 37K, Gladstone Street and Harborough Road should be seen as preferred locations for small-scale office and workshop-based businesses.

Wellingborough

10.48 Wellingborough has sites which may have potential for employment development located at the eastern, northern and western edges of the urban area. However, many of these are constrained and are unlikely to come forward for development in the short term. The Stanton Cross urban extension provides a major opportunity for employment growth that could be linked in with the station, although it is thought to be largely dependent on the development of residential units, which require significant infrastructure to bring forward. This may impede the development of employment uses in this location in the short term.

10.49 If Stanton Cross does not come forward for employment development in the short to medium-term, there are opportunities at 14W, Appleby Lodge and 13W, Wilby Grange. Both of these have access issues and may be dependent upon the development of a link road to Kettering. This new road would make these sites very attractive from a market perspective. If this road link was developed, it would also make 16W, Pulse Park more attractive, which is probably unviable at present and has significant planning constraints.

10.50 In summary, Stanton Cross would be the preferred choice for strategic employment development, but sites towards the west of the town would be attractive, especially if the Wellingborough – Kettering road is developed.

Rushden

10.51 There are a limited number of sites available which are not subject to constraints in Rushden. There are opportunities for small-medium growth at sites within the urban area. The major opportunities exist at 4E, Rushden Lakes, which continues to require further investment to be brought forward for employment development at present and 17W, which it is estimated would be subject to very large infrastructure costs, although this site does have potential for a massive amount of distribution and could be linked to the railway. There are a number of mixed use town centre sites, which provides regeneration opportunities in the town.

10.52 In summary, office-based employment and small workshop businesses should be located within the existing urban area wherever possible, whilst general industrial employment could be located on land close to the A45, such as at 7E, Northampton Road. In the longer term, there may be potential for employment development at Rushden Lakes as part of a wider scheme if infrastructure constraints can be resolved.

Thrapston

10.53 The north and east of the settlement provide natural locations for growth – these locations would be close to the A14 / A605 junction and are close to the existing employment uses. These sites are relatively unconstrained and could probably come forward for industrial and distribution development soon.

10.54 There is also the potential for small amounts of office development within a number of sites identified for redevelopment within the town centre.

Raunds

10.55 There is significant potential for employment development at two sites, E3, Land to North of Raunds and E2, Warth Park, towards the north and west of the town. Both of these sites have very good links onto the A45 and are within a few minutes of the A14. There is clear market demand for distribution and flexible industrial and office units within both of these locations. Employment development within Raunds would also help to reduce the very large imbalance of out-commuting from the town.

Other North Northamptonshire Towns

10.56 Smaller scale potential important employment sites have been identified at Burton Latimer, Irthlingborough, Oundle and Rothwell. Employment development in these towns is expected to be delivered as part of the overall development strategies in the adopted Core Strategy with a view to maintaining a balance between new housing and jobs and to diversify the economic base.

Northampton

10.57 There are a large number of small sites identified within Northampton, most of which are located within existing industrial areas and can be developed immediately. Most of the large sites with potential for employment development are located outside of the local authority boundaries, within urban extensions within the wider Northampton Implementation Area in South Northamptonshire and Daventry district. It is considered that with respect to the scale of employment in borough, the town's role as a regional centre a significant new business park/ Technology Realm development will be required in addition to the town centre development opportunities. This is to ensure a readably available offer and choice for the investors.

10.58 We consider that the most sustainable option for employment development in Northampton is as follows:

- Direct town centre office development towards central Northampton which has the best public transport links in the county, especially towards the Castle Station, Waterside development, St johns Development and Avon Nunn Mills.
- Distribution and general industrial uses should first be accommodated in a number of sites towards the south west of the town, including significant Homes And Communities Agency Land and potential additional development at Junction 15a and 16, which are close to the M1 and of which in particular Junction 15a is most are ready for development in the short to medium term. There are also further opportunities to extend sites on the Brackmills Industrial Estate, Grange Park, other Bedford Road Sites and some limited opportunities to the north of the town.
- There are also opportunities to develop opportunities in the West of the Town, linking into new housing development South West District.
- In the medium term the preferred market opportunities are to develop Grange Park towards the south east of the town. This area has better links to the M1, London and the South East

than many other parts of the town and provides opportunities for employment to come forward alongside proposed residential development.

- There are opportunities to develop around the north of Northampton around Overstone Leys (SELA D30). This location currently does not have as good links to the M1 as Grange Park. It is clear that this general location would require a significant amount of new infrastructure to bring forward development on a large scale. There is also the potential to link development with the university arc. Development may prove to be the catalyst to alleviate the congestion on the A43 which is a Northamptonshire County Council priority. There are further development opportunities in this area, which may need to be explored through further large scale masterplanning in the future liked to major infrastructure improvements in this area.

10.59 Midway Park (site S16) located at J16 of the M1 motorway is one of the largest development sites put forward within the SELA. The site has the potential to support in the region of 11,000 jobs based on approximately 150ha of land, being available which is likely to be developed on a phased basis. The site has been identified as a "Strategic Employment Site" in the West Northamptonshire emerging Joint Core Strategy. Information provided suggests around 60% for B8 purposes leaving a significant residue of land for offices, light industrial, general industrial, special industrial and non B space uses. The site scores green for commercial suitability but scores red for sustainability giving a total quality score of amber. Concerns have been raised by some public partners particularly with regard to major sustainability constraints given the scale and location of the proposed site. These include public transport accessibility and potential impacts on the Strategic Road Network including the M1 and the operation of Junction 16. Whilst the site performs strongly in commercial market terms, significant further investigation will be required to identify whether or not sustainability constraints could be addressed in line with regional and national policy guidance..

Daventry

10.60 Apex Park, towards the north west of the town, is an established location for general industrial and distribution development and would be with a suitable location for continued development of this type.

10.61 There are opportunities for office development within Daventry town centre, including maximising commercial opportunities arising from the I hub development There are also significant opportunities for office and general industrial uses towards the south east of the town. This area provides the best links to the M1 and may help to finance for the new road link to the M1.

10.62 An inspector's decision is due following public enquiry for the Danetree Village proposals (Site D6). A significant employment element is incorporated within this mixed residential and commercial scheme, though it is recognised there may be additional commercial development in this location and the surrounding area, given the potential for redevelopment of the Marches estate. In addition sites D28 and D17 are promoted as future extensions. The promoter indicates that in advance of the delivery of major off site infrastructure it is envisaged that there will be an initial phase of development that will include the provision of approximately 10 ha of serviced employment land. This employment element would potentially be available in 2010

Towcester

10.63 There are initial opportunities to fill out employment land around the A43 / A5 junction, as well as a number of town centre sites. These sites should be prioritised wherever possible and are likely to accommodate employment development in the short term.

10.64 In the medium-term, the strategic opportunities are all located towards the south of the town, where an application has been submitted at Towcester Vale for an urban extension. However this scheme is dependent upon a new road being built which will link the A45 and the A5, and which will only be paid for by the residential scheme. The delivery of this site for employment uses is linked to the wider delivery of wider urban extension scheme. The employment uses within this site is likely to be located closer towards the A45 or the A5 within this site

Brackley

10.65 The only employment sites available for the town are location towards the north and west of the town. All of these sites are within the A43 which provides a natural boundary to the settlement. These sites benefit from direct access to the A43 and are close to the existing urban area.

10.66 Town centre sites should be developed for office units wherever possible.

Future Property Market Prospects, Opportunities & Priorities

10.67 There are a number of key property market factors that have impacted on and will continue to influence the delivery of B-use employment in Northamptonshire. These are discussed below.

Warehousing and Distribution

10.68 There has been a substantial increase in the stock of commercial and industrial building stock over the last 10 years. A large proportion of this has been within the warehousing and distribution sector and a significant percentage of this stock has been delivered in North Northamptonshire rather than West Northamptonshire.

10.69 It is considered that such is the strength of the location for logistics that if there hadn't been limitations in supply, that the amount of the new stock would have been even higher. However, the existing level of vacant B8 facilities and recent market trends as highlighted, may limit the development and demand for new B8 facilities The split between North Northamptonshire and West Northamptonshire is largely attributable to restrictions in the supply allocated and serviced land in West Northamptonshire since 2005.

10.70 Elements of the B8 sector is often perceived as being relatively low skilled, low value with low density employment generating potential. Warehousing development is also associated with negative transport impacts particularly through the generation of significant HGV movements. However, this perception can mask important differences in an increasingly technology-driven sector. Furthermore, recent evidence from the sector indicates that around 15% of all jobs created by warehousing development are provided through office-based (B1) floorspace. Modern B8 activities can also support significant managerial and skilled support jobs which need to be taken into consideration when planning for future allocations and planning decisions.

10.71 Whilst it is not proposed that LDFs promote unfettered support for the development of new B8 facilities, it is important to provide an objective assessment of the future role of the sector in Northamptonshire.

10.72 In defining the future role of B8 in the county, it will be important to assess the opportunities created by measured and planned control of the sector. This should include consideration of factors such as:

- The net additional economic benefits that can be accrued to the county given its competitive strength as a location for logistics activity.
- Scope for profitable B8 development being permitted in optimal locations where consent can facilitate the unlocking of 'difficult' office or light industrial sites in other locations, particularly town centres. Innovative use of the Community Infrastructure Levy could present a valuable tool in spreading the benefits of B8 development to other segments of the economy. This approach could be strongly complemented by targeting public sector investment in similar ('difficult') locations.
- Knowledge-based and technology driven modern B8 developments that can assist in diversifying the range of jobs created in Northamptonshire.

- Environmentally robust, 'green distribution' – can the county present itself as a pioneer in environmentally efficient logistics activity

10.73 In considering the B8 issue generally it is important to differentiate between local, for which we would indicate the unit size of less than 5,000 sq m, regional which would be between 5,000 sq m and 15,000 sq m and national which we would regard as being in excess of 15,000 sq m. Clearly many national occupier requirements have been for unit sizes in excess of 30,000 sq m. In considering a site suitability for B8 an awareness of the different occupational needs between local, regional and national B8 is important.

10.74 With the substantial decline in industrial / manufacturing employment an element of warehousing / distribution can often be required for sites to be opened up, serviced and fully developed.

10.75 For units sizes of less than 5,000 sq m buildings would tend to be constructed by developers that would be flexible to meet the occupier requirements of a wide range of occupiers to include manufacturing (light and general industrial) and warehousing and distribution. Excluding an opportunity for developers to sell / let units to the local B8 market would be a considerable constraint to the delivery of a large number of employment sites.

10.76 The contribution of B8 development to the delivery of offices should not be underestimated. Many developers report that on average B8 buildings offices contribute 15% of the total number of employees.

10.77 Many new potential / allocated employment sites have a considerable up front development cost associated with infrastructure delivery. Often a large scale presale / let is required to facilitate the initial investment required which is generally only likely to be delivered by a warehouse / distribution development. In the prevailing market, sites were there was the potential to deliver an element of residential to provide this initial "kick-start" are now reliant on the delivery of a B8 to move them forward.

10.78 Insufficient allocations for B8 result in developer / occupier demand on other sites that would not be regarded as being prime for warehousing and perhaps better suited to offices / industrial.

10.79 The delivery of B8 on secondary sites over recent years has the potential for large scale B8 units to become "white elephants" in the future. Once the property has been constructed on the site there is limited potential for re-development of the sites in the future for alternative commercial uses.

10.80 National B8 with large scale buildings are inappropriate for the majority of sites. It is important to identify key strategic prime B8 sites for the national warehouse and distribution market.

10.81 Northamptonshire is undoubtedly a strong logistics location. At present it is considered that there is over two million sq ft of B8 units available and vacant with North Northamptonshire. It may be that national B8 occupier requirements will continue to evolve in the future with it becoming ever more important to focus on prime B8 sites. Future changes may relate to an increased importance of rail freight, overall size of buildings reduced with occupiers seeking larger site areas for external / container storage together with an occupational need for shorter term flexible lease agreements rather than for institutional leases of 15 years or more.

Industrial

10.82 Following national trends, Northamptonshire has witnessed significant reductions in industrial / manufacturing floor space stock over recent years.

10.83 Whilst agents continue to report reasonable levels of enquiries from within the industrial / manufacturing market sector, it is important to note that occupational needs within this market sector change over a number of years which can involve occupiers requiring larger or smaller properties and more modern facilities. Many occupiers already based in the area are in dated buildings suffering from obsolescence restricting the ability of occupiers to invest in their businesses.

10.84 Demand is received from enquiries based outside of the area but a considerable number relate to companies already based within the county and an inability to provide these occupiers with a sufficient supply will result in accelerated levels of reductions in the level of employment within this market sector. Many key employers are based in Northamptonshire who are currently reviewing their property needs which may result in them locating outside of the area if Northamptonshire is unable to provide sufficient appropriate alternative site opportunities.

10.85 The occupational and locational needs of the industrial / manufacturing sector tend to be very wide ranging. Consequently, considerable choice needs to be available in terms of sites available in the marketplace.

10.86 Many industrial / manufacturing processes require particularly large site areas as the costs of relocating are extremely high and they need to provide potential for future expansion. There are also often requirements for considerable external storage / servicing area. This therefore would not maximise development potential and therefore there has often been a reluctance from developers to meet such occupational needs. The potential for securing development of industrial / manufacturing sector perhaps evidenced by the construction by Hampton Brook of the 30,000 sq ft facility for Okay Engineering at Magnetic Park, Desborough which was on a site of 3 acres.

10.87 Many industrial / manufacturing operators are prepared to consider the acquisition of sites and developing their own facility. However generally this requires sites to have been fully serviced and effectively be "oven ready". Many potential employment sites have constraints / sizeable upfront infrastructure costs which restrict the ability of occupiers to develop out such sites.

10.88 The supply of sites for industrial (and indeed offices) has been further constrained by developers / occupiers seeking sizeable B8 element on site that would have been suited to industrial / offices.

10.89 There are a number of sectors within some of the towns such as food and drink in Corby for example. However these links are largely associated with historic factors effecting their decision to locate to a particular town. The food and drink element within Corby is considered to have largely been associated with the availability of property and the benefits offered by the Enterprise Zone between 1981 and 1991. To exploit existing sectors based within towns to target further growth within these sectors and to exploit the opportunity to attract different sectors to particularly sites / towns consideration needs to be given to the particularly occupational needs within the different sectors, identified within the preferred economic scenario. The ability to meet the requirements of these sectors is not just related to sites themselves but to provide a wide range "of layers" such as education / training, etc.

10.90 Much of the industrial / manufacturing stock within the county is of a fairly poor quality being in excess of 20 years old and it is envisaged that obsolescence will be an increasing problem. Some of these industrial areas would perhaps now be more suited to alternative development such as residential and / or are in key locations where regeneration is required. Examples would perhaps include the Denington Road Industrial Estate at Wellingborough, Pytchley Lodge Industrial area in Kettering and Long March in Daventry.

Offices

10.91 There has been an increase in the office stock in Northamptonshire between 2005 and 2008. The majority of this has been in West Northamptonshire. The development that has been undertaken has been based on relatively small scale courtyard schemes of less than 1,000 sq m with the majority of deals on a freehold basis taking advantage of initiatives such as Self Invested Personal Pensions (SIPPS) targeting latent local demand, in the early years.

10.92 There remains uncertainty regarding the county's ability to deliver the future office employment targets for the region. With the withdrawal of SIPPS and reduced take up over recent years there needs to be a major step change to deliver significant further offices. This would require the delivery of units in excess of 1,000 sq m with occupiers secured on a regional and national level.

10.93 Northampton is the strongest office location within Northamptonshire and even here it is clear that there have been limited deals to serve regional and national markets.

10.94 It is clear that prime sites need to be targeted and in view of the wide range of occupational needs of different office occupiers, sites should be specifically targeted around stations, within town centres and on prime business parks with excellent accessibility. A wide range of choice needs to be made available.

10.95 Developers need to be able to be flexible to meet the occupational needs of particular occupiers to secure the potential of delivering buildings on a design and build basis. Barriers to development need to be removed. Section 106 liabilities / planning conditions on parking on some of these key office sites need to be looked at to encourage the opportunity of providing for office development.

10.96 Much of the sites allocated for offices form part of substantial urban extensions in primarily residential led schemes. In reality, such sites may not be made available in the marketplace for office development and could be regarded as to secondary by the majority of potential occupiers. In towns where significant allocations are within these areas, consideration should be given to the amount of land allocated and available in the marketplace at any given time to ensure that there are sufficient sites available to potential occupiers.

Sector Specific Sites

10.97 In line with government guidance, consideration has been given to the county's key sectors/ clusters for growth. The draft Northamptonshire Strategy for High Performance Engineering and Motor Sport highlights that the County is a world leading location for research and manufacturing in high performance engineering and for the development of, watching and taking part in motorsport. Silverstone, Brawn GP Racing, BAE and Cosworth are leading examples of Northamptonshire's high performance engineering and motorsport cluster. The strategy has the aim of ensuring that:

'*By 2014 Northamptonshire will be recognised internationally, nationally and in Northamptonshire as the leading location for research, design and manufacturing in High Performance Engineering*.'

10.98 The draft strategy highlights a range of potential activities to promote and develop the sector, but also recognises the importance of providing high quality commercial sites and premises to attract and retain investment within the sector. The strategy highlights the need to:

- Secure Local Authority prioritisation for the clusters in DPDs and other relevant planning documents. For example, in making provision for suitable employment land and buildings.
- Secure agreement and support for the 3 key development hubs:
    - Brixworth
    - Rockingham Motor Speedway
    - Silverstone

10.99 These locations should be considered with regard to their ability to support the High Performance Engineering and Motor Sport sector. These sites should be tested through the full planning process, reflecting the specific needs of activities in terms of energy and design requirements. Consideration should also be given to the suitability of wider ancillary uses to facilitate the effective operation of the cluster, including limited B8 and non B-uses such as sector specific retail facilities.

10.100 Environmental Technologies is another major sector that Northamptonshire is seeking to develop and attract new business investment. This is a broad ranging sector that has activities as diverse as waste processing to research and development. The land and premises requirements of these activities vary considerably and can be aligned closely to statutory waste planning and management legislation. Within Northamptonshire this is currently being developed through the Minerals and Waste Development Framew (MWDF). The MWDF highlights a range of potential locations for waste facilities which should be considered the preferred location for waste activities.

10.101 However, further work should be undertaken with local authorities to identify the potential to maximse the economic impact of the sector in terms of opportunities to support B use activities (predominantly B2 and B1c) sites, which may benefit from agglomeration effects.

Technology Realm

10.102 As highlighted in Section 2, NEL and its public sector partners have undertaken extensive research to pursue the concept of delivering a 'Technology Realm' in Northamptonshire. This has been further developed through the adoption of the Technology Realm concept through the North Northamptonshire Core Spatial Strategy. Focusing on key sectors and niche specialisms, the Technology Realm aims to deliver an integrated network of high quality sites and premises, business services, high end ICT infrastructure, amenities and other facilities which will take on a pioneering role in developing high value employment growth in the county.

10.103 The Vision for the Technology Realm is to:'Develop and deliver new models of innovative property solutions and related business innovation services in Northamptonshire to enable the step-change in job quality and job growth advocated through the Sustainable Communities Plan. In February 2007, the Technology Realm Forward Strategy[13] identified a geographical framework for implementing the concept. This comprises three key components:

- Technology Realm Hub – to be developed in the Northampton Growth Area due to the presence of existing infrastructure for employment, housing, education and support services.
- Technology Realm growth areas – relevant 'spoke' developments in the growth areas of Corby, Kettering and Wellingborough.
- Technology Realm areas of opportunity – relevant support developments and /or services in other parts of the county including Daventry and Towcester.

10.104 In contributing to the development of the Technology Realm, the SELA will provide an important input in identifying potentially suitable sites for accommodating the physical elements of the concept. The Technology Realm will build on existing assets to provide a ladder of commercial premises in the county ranging from 125-500 sqm offices, 200-1,000 sqm industrial units and some targeted 10,00 sqm premises to attract regional and national B1 functions. In particular the Technology Realm will be used to increase B1 accommodation in the county.

10.105 In summary, consultancy advice provided to NEL indicated that at a total net additional 8,500 jobs in Northamptonshire could delivered through the Technology Realm. This was estimated to require approximately 236,000m2 of office, industrial and warehouse premises on approximately 60ha of land.

10.106 As part of the SELA process, potential sites have been identified which score highly and meet the key Technology Realm criteria. These sites warrant further investigation as potential Technology Realm sites and are considered as part of the strategic sites recommendations in this report. Potential public-private partnership mechanisms should be examined in order to bring forward these key sites in line with the Technology Realm policy concept. Other priority sites meeting the minimum size requirements should also be considered as part of this additional investigation.

[13] DTZ for NEL & Partners, 7 February 2007.

Supply Response – Next Stage Evaluation

10.107 In meeting the preferred employment growth scenario for the county there is an urgent requirement to provide an immediate supply for the different market sectors within each of the different districts / boroughs. Our analysis of existing employment allocations indicates that there are significant supply problems relating to many market sectors within key towns in the county. It is a priority for these shortages of supply to be addressed as a matter of urgency. A suitable supply would be on the basis that sites are immediately available for development / occupation and there is an appropriate level of choice available to potential occupiers. Ideally this should relate to sites that would be available from both developers on a speculative or design and build basis or through one purchased being already serviced.

10.108 There are a number of large scale sites currently being promoted for employment development. These may be linked to the provision of key infrastructure which will be important in making a significant contribution to the scale of employment growth required in the county.

10.109 Accordingly, based on comprehensive site assessments, our recommendations are that the following sites, as illustrated in Tables 10.4 – 10.10 should be considered and tested through the planning process for primarily employment purposes. This ‘next stage evaluation’ will be critical to ensuring that sites are comprehensively assessed in line with statutory planning requirements as part of the formal LDF process. Whilst a significant proportion of these recommended sites are already allocated or are contained within emerging DPDs, a substantial programme of public sector intervention and enabling activity will be required to bring many of the identified sites forward. The scale, nature and timing of intervention will vary according to the extent of constraints and other barriers to development which will need to be resolved or overcome for the sites to be brought to market. For sites in each local authority, the tables provide a summary of these constraints for each site. Sites highlighted in green have been assessed as being of the highest quality in terms of suitability for employment. Those highlighted in amber / yellow are considered of fair quality with potential to become high quality employment sites.

10.110 Where sites identified in the Tables 10.4 – 10.10 already have planning consent, these will not require ‘next stage evaluation’.

10.111 In addition to the sites identified in this report, it is recognised that additional sites may come forward through the normal planning and development processes. These sites should be fully assessed in accordance with the criteria utilised in this study as well as relevant, up-to-date policy and development control requirements. Where these are situated in appropriate locations (consistent with relevant policy) and can, through working with statutory bodies demonstrate strong commercial need and viability as well as high sustainability and design standards, such sites should be considered favourably, particularly where they have the scope to support the county’s key economic sectors/ clusters and/or knowledge based initiatives such as the Technology Realm and Environmental Technology sector/ cluster activities.

10.112 As already highlighted in SNEAP, there is a strong need to support the creation of a higher level skills base as a key driver in achieving high value added employment in Northamptonshire. This will include the need to promote non B-use employment including the development of additional Further and Higher Education facilities. These facilities are critical to the development of more knowledge-intensive economy and are often major employers in their own right. Partners in the education sector have a number of existing expansion plans across the county and it will be important to ensure that support is provided to secure the expected increase in student numbers as part of the policy-driven growth agenda in Northamptonshire. In doing so, key sites will need to be identified and promoted particularly where educational and research facilities can stimulate the clustering of other business activities in key sectors. Recent examples of where this clustering effect has taken place include the successful development and expansion of the Portfolio Innovation Centre which supports the growth of the creative industries sector.

Table 10.4 – Corby Sites Recommended for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
C1	Priors Hall	5.8	X												19600	19500	-
C2	North of Birchlington Road	36.3	X												-	82,280	41,140
C4	Cockerell Road	9.3	X												7,914	15,827	7,914
C5	Willowbrook North (Car Storage Site)	25.9		X	X										-	41,440	41,440
C6	Stanion Plantation	60.0						X							-	102,000	102,000
C9	Southern Gateway	2.9	X												4,947	4,947	-
C10	Corby Community College Site	4.0					X								38,488	-	-
C11	Land at Centrix Park	11.3	X												-	25,704	12,852
C12	Site Genner Road	2.0	X												-	6,800	-
C14	Site Bangrave Road	1.9			X			X							6,358	-	-
C 23	Soot Hills	9.6								X					3,716	3,716	3,716
C25	Land at Ironpit Close, Geddington Road, Corby	0.4					X								880	880	-
C26	Parkland Gateway	2.8	X												17,792	-	-
C27	Oakley Hay	1.3			X						X				2,210	2,210	-
Total		**173.5**													101905	305304	209062

Table 10.5 – East Northamptonshire Sites Recommended for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
E 2	Warth Park, Raunds	33.5					X	X	X						-	30,000	100,000
E 3	Land to North and Northeast of Raunds	26.0					X			X					2,000	45,000	45,000
E 7	Northampton Road, Rushden	6.1					X		X						9,712	9,712	-
E 8	East Road, Oundle	1.0					X								-	3,200	-
E 9	Splash Leisure Pool, Rushden	0.8									X				1,280	1,280	-
E 10	Alfred Street Junior School, Rushden	0.7									X				1,120	1,120	-
E 11	Land at Cosy Nook and rear of High Street Properties , Thrapston	1.0		X						X					8,000	-	-
E 12	Cattle Market, Thrapston	1.0		X			X			X					8,000	-	-
E 13	Bull Ring and Church Walk, Thrapston	0.2		X						X	X				1,600	-	-
E 14	Duck Street Car Park, Rushden	0.7							X	X	X				4,480	-	-
E 15	High Street, Thrapston	1.0		X						X	X				8,000	-	-
E17	Nene Park	20.3			X		X								5,699	7,884	-
E 18	Newton Road Car Park and Recycling Centre, Rushden	0.9								X	X				5,760	-	-
E 19	Pemberton Centre , Rushden	2.2							X		X				14,336	-	-
E23	Scotts, Bridge Street, Thrapston	2.5									X				4,000	4,000	-

E24	Plot 2 A1 / M1 Link, Thrapston	2.0	X												-	3,434	3,434
E25	Rockingham Motor Speedway	40.5					X		X						-	129,600	-
Total		**140.4**													**73,987**	**235,230**	**148,434**

Table 10.6 – Kettering Sites Recommended for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
K 1	Kettering South	110.0					X	X	X						102,667	102,667	102,667
K 6	Cransley Park	13.0	X												22,100	22,100	-
K 7	Kettering Hub	15.0					X		X						21,677	21,677	21,677
K 8	Kettering Business Park	15.0	X												9,253	16,192	-
K 10	Kettering East	20.2					X	X		X					30,360	30,360	-
K14	Land adjoining the A6, Burton Latimer, Nr. Kettering	32.6							X						34,816	34,816	34,816
K 31	Magnetic Park	6.0	X												4,430	8,860	4,430
K34	Station Quarter, Kettering	5.0	X												32,000	-	-
K35	Former Bus Depot	0.2							X						-	480	-
K36	Stanier Close, Kettering	2.5	X												-	8,000	-
K37	Gladstone Street and Harborough Road, Desborough	1.0	X												-	3,200	-
Total		**220.5**													**257,303**	**248,352**	**163,590**

Table 10.7 – Wellingborough Sites Recommended for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
W1	Stanton Cross	46.7						X		X					15,000	63,000	123,000
W3	Harrowden Court	2.2	X												-	8,547	-
W4	Central Park	2.3	X												-	8,826	-
W5	Sanders Business Park	1.3	X												-	3,015	1,507
W6	Upper Redhill	10.5	X												-	26,120	-
W13	Wilby Grange	16.2					X	X	X						32,500	32,500	-
W14	Appleby Lodge	65.3					X	X	X						-	104,512	104,512
W15	Ogee Business Park	9.7	X												-	22,009	11,005
Total		**154.3**													**47,500**	**268,529**	**240,024**

Table 10.8 – South Northamptonshire Sites for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
S1	Silverstone Circuit	37.7	X												-	120,640	-
S3	Burcote Road	1.6	X												-	4,992	-
S4	Moat Lane	0.5									X				3,200	-	-
S9	Turweston Road, Brackley	14					X		X						14,933	29,867	-
S12	Towcester Vale	20.6						X	X	X					16,480	32,960	16,480
S13	Turweston Road	10.2				X	X		X						8,000	15,000	15,000
S14	Grange Park	1							X						1,600	1,600	-
S15	Tove Valley	1	X												3,200	-	-
S16	Midway Park	150.0					X		X						134,153	88,723	180,619
S17	Burcote Wood Farm	24.5					X	X	X						19,600	39,200	19,600
S18	Radstone Fields	2				X	X		X						1,600	3,200	1,600
S22	Brackley Saw Mills	2	X												3,200	3,200	-
S30	Preston Green	50						X	X	X					40,000	80,000	40,000
S31	Central Woolgrowers	0.2	X												-	640	-
S32	Old Tiffield Road	1.59	X												1,696	3,392	-
S34	Pineham West	16				X			X						-	-	51,200
S36	GP1 Grange Park	9.13	X												9,739	9,739	9,739
S37	GP4 Grange Park	8	X												12,800	12,800	-
S42	South of Jacks Café	8.5				X			X						13,600	13,600	-
Total		**358.5**													**283,801**	**459,552**	**334,238**

Table 10.9 – Northampton Sites Recommended for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
N2	Caswell Road	1.4	X												70	4,536	-
N3	Pavilion Drive	1.6	X												5,120	-	-
N4	Nationwide Beach Car Park	3.2	X												10,240	-	-
N5	Avon Site	12.0	X												10,500	-	-
N6	Site F & G Upton	1.5	X												4,800	-	-
N7	Reynoldstone Road	0.1	X												-	384	-
N8	Swan Valley	1.6	X												5,120	-	-
N9	Moulton Court	1.0	X												1,600	1,600	-
N10	Coca Cola, Brackmills	12.8		X											-	-	40,960
N11	Former L & H Polymers Site	3.2	X												-	10,336	-
N12	Collingtree	2.0								X					3,200	3,200	-
N13	The Lakes, Bedford Road, Northampton	3.1	X												9,856	-	-
N14	Martins Farm	32.4									X				51,792	51,792	-
N15	Upton Lodge	4.8						X		X					11,000	11,000	-
N16	Upton Park	4.5				X		X		X					7,200	7,200	-
N17	Castle Station	5.3					X								25,584	-	-
N18	Waterside	2.0					X								16,000	-	-

N19	Crow Lane	2.5	X												-	4,000	4,000
N20	St Johns, Northampton	0.6		X											4,425	-	-
N21	Angel Street	0.7		X											5,280	-	-
N22	Timken Site – Aspect Business Park	5.4								X					7,711	13,657	-
N23	Bridge Street, Northampton	1.5		X											1,061	-	-
N24	Pineham E & C	14.0	X												-	-	49,703
N25	Swan Valley, SV1	9.5	X												30,336	-	-
N26	Swan Valley, SV3	1.5	X												2,416	2,416	-
N28	Swan Valley SV7	4.3	X												6,864	6,864	-
N29	Milton Ham	10.0	X												16,000	16,000	-
N30	Round Spinney RS2	0.3	X												480	480	-
N31	Kingsheath, Dallington Fields, Lodge Farm, Northampton	14.0						X							14,933	29,867	14,933
N32	SJ 2 St James	0.9	X												-	2,880	1,440
N33	FC1 Far Cotton	1.4					X								2,304	2,304	-
N34	Lady's Lane	0.4	X												3,200	-	-
N35	TC3 Newland Town Centre	0.4	X												3,200	-	-
N36	TC4, Victoria Street	1.8	X												14,400	-	-
N37	Houghton Gate, Bedford Road	19.5			X		X		X						81,000	-	-
N38	Edgar Mobbs Way	4.6					X								-	7,360	7,360
Total		**185.8**													**355,693**	**175,875**	**118,396**

Table 10.10 - Daventry Sites Recommended for Next Stage Evaluation

Site ID	Site Name	Total area for employment (ha)	No Known Constraints	Ownership and Site assembly	Possible land contamination	Awaiting delivery of other sites	Local infrastructure issues	Wider infrastructure issues	Planning constraints	Dependent on delivery of wider scheme	Other	Sustainability Score	Commercial suitability	Total Quality	Office Capacity (sq.m)	Industrial Capacity (sq.m)	Distribution Capacity (sq.m)
D1	DIRFT Expansion Site	54.0	X												-	-	180,741
D2	Apex Park, Daventry	35.0	X												-	-	112,000
D4	Rugby Radio Station	210.0					X		X						-	-	672,000
D5	Ilmor Way, Brixworth	6.2							X						-	19,840	-
D6	Danetree Phase 1 (Burnt Walls)	10.0							X	X					16,000	16,000	-
D10	Browns Road	3.2			X				X						5,120	5,120	-
D12	Church Fields	2.0							X	X					3,200	3,200	-
D19	Round Hill	45.0						X	X	X					72,000	-	72,000
D21	Former Midland Meat Packers Ltd	38.7									X				-	-	123,840
D22	Heartlands Phase 2	1.6	X												2,560	2,560	-
D23	Holly Lodge Drive	5.2					X		X						5,547	5,547	5,547
D26	Daventry Town Centre Phase 5 South	1.0	X												5,100	-	-
D27	Daventry Town Centre Site 3	1.5	X												8,220	-	-
D28	Long March, Daventry	4.0		X			X								4,267	8,533	-
D30	Overstone Leys	10.0					X		X	X					16,000	16,000	
D32	Daventry Town Centre Site 2	0.6		X											5,000	-	-
D33	Daventry Town Centre Site 4G	0.7	X												2,790	-	-
Total		**428.7**													**145,804**	**76,800**	**1,166,128**

Strategic Sites

10.113 It is recognised that the preferred employment growth scenario for Northamptonshire represents a significant challenge in terms of delivering the volume of B space employment proposed. Whilst it is important there is a focus on the ability to provide immediate readily available sites to meet the needs of existing companies, a critical aim should be to encourage inward investment from regional, national and international sources.

10.114 This will require a number of strategic sites to be made readily available. In many cases the delivery of strategically sized sites will be required in order to support the cost of infrastructure investment and also to provide a critical mass of development suitable in attracting new large scale investment and occupiers to Northamptonshire. These sites must be of a quality to appeal to the national market and as such need to be specifically targeted to meeting specific market sectors.

10.115 The sites will need to be the "flagship sites" for the county and beyond with individual site owners being given significant marketing support from the public sector involved in the promotion of Northamptonshire as a whole. In order to deliver these sites in a timely fashion, it will be important for the planning process to operate efficiently and positively in accordance with the emerging PPS4.

10.116 In order to ensure that the strategic sites can be made available at the earliest opportunity, significant public sector intervention may be necessary. Amongst others, strategic sites should be prioritised for inevitably limited public sector intervention funds.

10.117 An initial portfolio of potential strategic sites in the county has been identified in this study. These sites have been proposed on the basis of their:

- potential to provide a national, regional or sub-regional role in terms of the quantity and/or quality of jobs that can be supported. The sites demonstrate strategic strengths and opportunities in terms of their scope for adding significantly to the growth agenda in Northamptonshire.
- potential to provide a specialist but significant role in terms of sector strengths (as defined by SNEAP or emerging statutory plans).
- potential to delivery high quality development schemes incorporating state-of-the-art technology, physical and electronic connectivity and high environmental standards (e.g. excellent BREEM status and energy efficiency).

10.118 The following key priority sites comprise our proposed portfolio of strategic sites. It should be highlighted that the strategic sites have been identified through the site assessment process conducted by the consultant team. These assessments and associated recommendations do not replace the normal site allocation process to be conducted in the development of LDFs. Consequently, it should be stressed that the site recommendations set out in this report should not in any way prejudice decisions to be taken by the local planning authorities during the LDF process or in the determination of planning applications. Similarly, site infrastructure constraints such as highway and flood risk constraints will also need to be fully considered during the normal site allocation and development control process.

Strategic Distribution Sites

10.119 We recommend that rail served facilities at Eurohub- Stanion Plantation and DIRFT- Expansion site are brought forward specifically to service national B8 requirements. In delivering these sites local partners must seek to maximise their economic contribution, through efforts to optimise the provision of ancillary office accommodation and ICT connectivity whilst minimising the environmental impact. They key details of these sites are as follows:

- **C6 Stanion Plantation, Corby** (Net area 86 ha with planning consent for B8 Warehousing and Distribution). Development costs of the scheme are likely to be relatively high which may impact on its deliverability. However as a general location, the site provides an opportunity to provide a large scale, rail-linked warehouse / distribution facility for north Northamptonshire. It may be that viability / deliverability of the scheme could be improved with a larger scale scheme.
- **D1 DIRFT Expansion Site** (Site has planning approval and a gross area of 54 ha and net area of 43 ha). The site provides an opportunity to extend the existing rail-linked substantial warehouse / distribution facility in west Northamptonshire. It may be that through to 2026 and beyond there will be additional pressures for development in this area which could extend partially into SELA site D3 and more particularly SELA site D4, which offers the potential for further rail served facilities. Any enlargement of the site should have regard to land immediately north of D1 where primarily residential expansion is being promoted. This land is located in Rugby, Warwickshire (West Midlands Region).

Sector Specific Sites

10.120 In light of the county's internationally recognised strengths in the High Performance Engineering and Motorsport Sector and the emerging Northamptonshire Strategy for High Performance Engineering and Motorsport, the following sites are considered as strategic in supporting the continued growth of the sector in the county:

- S1 Silverstone;
- E25 Rockingham Motor Speedway, Corby; and
- D5 Ilmor Way, Brixworth.

10.121 These sites, totalling 84.4 ha in size, could support a range of B and non B use employment. The sites are at differing stages of the planning and commercial delivery process. Local partners should continue to work together, as part the Northamptonshire Strategy for High Performance Engineering and Motorsport in bringing forward these sites to specifically support the county's long term growth opportunities. There is considered to be a realistic prospect of suppliers and sub-contractors being attracted to such sector specific locations where some of their major customers already operate. This opens up the opportunity to stimulate the clustering of cutting edge technology supply businesses which can play a major part in generating new, high-value jobs in the County. It is important to note that site E25 lies across the boundary between Corby and East Northamptonshire. Consequently, in order to maximise the economic potential of the site, it will be necessary for both local authorities to work closely together in planning for its development (e.g. through a joint masterplanning approach).

10.122 Environmental Technologies is another major sector which is being targeted in Northamptonshire in attracting new business investment. This is a broad ranging sector with diverse needs in terms of sites and premises. This includes waste management activities, the preferred sites and locations for which are being identified through the Northamptonshire Minerals and Waste Development Framework (MWDF). Local partners should work together to maximise the economic impact of the sector in terms of opportunities to providing supporting B use (predominantly B2 and B1c) sites, which may benefit from agglomeration effects.

Northampton Central Area

10.123 The redevelopment of Northampton town centre for commercial B uses is a strategic priority. The following sites if delivered will support a significant amount of primarily B1 accommodation: N17 Castle Station (5.3 ha) N18 Waterside, Avon Nunn Mills Site (9.6 ha) plus N20, N23, N21, N35, N36 and N34. The phasing of these sites will need to be carefully planned to ensure a balance of supply and demand in the town centre.

General Strategic Sites

10.124 In addition to the above sites the following locations have the potential to support strategic job growth in the County.

10.125 W1 Stanton Cross extends to a net 37 ha of employment land and forms a smaller part of a much wider urban area extension to the east of Wellingborough. Significant concerns exist regarding the deliverability of the full master-plan which may need to be changed. Similarly, the Section 106 Agreement may also be renegotiated. We consider the office element proposed at Station Island to be a key site for the delivery of office accommodation in Northamptonshire. It is strategically located with excellent rail links to London and good connectivity to be provided with Wellingborough town centre. It provides a significant opportunity to attract inward regional and national office occupiers. However, the timeframe for delivering the industrial element of the scheme may be constrained by the need to fund high up-front infrastructure costs as well as the possibility that competing sites in other locations may be more feasible at least in the short to medium term.

10.126 K1- Kettering South extends to some 110ha and is located on the A14 (a Trans European Network route).This site has the potential to act as a significant strategic site for employment uses that could service national as well as regional and local needs. However, it is recognised that there will be a number of infrastructure constraints, not least access to the A14. Further work on the deliverability of this site should be undertaken with local partners.

Town Centres

10.127 All boroughs and districts in the county have a range of town centre redevelopment opportunities and sites emerging for commercial development. In line with the SNEAP, prioritising these sites for development will be important in ensuring that attractive and vibrant town centres can support sustainable jobs growth. As such it is recommended that local partners continue to work closely together in bringing forward town centre sites which can accommodate a range of B and Non B uses.

District overview

10.128 Many urban area extensions, know as Sustainable Urban Extensions(SUEs) are proposed throughout Northamptonshire, some being a long way from implementation. These mixed-used schemes incorporate significant levels of residential development along side economic, social and community facilities. These major schemes will inevitably require significant infrastructure investment for their delivery. It is important these sites are brought forward to achieve a reasonable balance between jobs and housing growth. However, in some cases a lack of commercial attractiveness of such sites may increase the need to consider employment development at other locations. Our recommended list of sites for further investigation (set out in Tables 10.4 to 10.10) have emerged from our independent site assessment process. We consider that these sites should all be further tested through the planning process for primarily employment purposes.

10.129 Our recommended Priority Sites as set out in Tables 10.4 to 10.10 have emerged from an independent site assessment process. We consider that these sites should be further tested through the planning process for primarily employment purposes.

Wellingborough

10.130 In addition to the potential strategic site at Stanton Cross, it is considered that Appleby Lodge: W14 (65.3ha) provides a deliverable opportunity for high quality mixed employment development. This site would be an extension to Park Farm Industrial Estate. A major step change is required to deliver significant growth in the office sector. High quality sites in the best locations will need to be provided in order to attract regional and national demand.

10.131 Wilby Grange, W13 (16.2 ha of commercial floor-space as part of a larger mixed use scheme) has the potential to attract regional demand. Existing highways problems to the A45 at the Wilby roundabout are a major constraint to development in Wellingborough generally. To support the delivery of significant employment growth in the area, it may be necessary to consider collectively a range of sites in order that a sufficient critical mass can be achieved to address the cost of overcoming highways constraints. The problems at the Wilby roundabout on the A45 are widely recognised and a solution to this highways constraint may be of considerable benefit to Wellingborough and North Northamptonshire as a whole.

Kettering

10.132 Given its location on the A14, Kettering has the potential to attract significant 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 available to the south of the A14 at Junctions 8, 9 or 10, typically K1; K6, K7. Alternatively there is the potential for a major site to be delivered at Junction 7 at the connection with the A14 and A43. Each of these locations has the potential to provide an important "gateway site" into Kettering. This general location is considered to provide the most significant area for employment growth in Kettering, for example through the provision of a new high quality business park within the next five years. Potential also exists for further development to the north of Kettering at K8, although this may be for general B-use as well as non B-use development. It should be highlighted that a major constraint to development in this and the wider area is area between junctions 7 and 10 of the A14. Overcoming capacity constraints in this location will be central to realising the employment potential of Kettering.

Corby

10.133 Corby has a good range of employment sites currently available for delivery in the marketplace or well advanced through the planning process. The successful delivery of the remaining part of the Parklands Gateway Scheme: C26 (2.8 ha) is important. However the area linking central Corby with the new railway station is of equal priority. As such there should be a focus on the delivery of the Corby Community College: C10 (4.0 ha).

10.134 Stanion Plantation is the strategic B8 site for North Northamptonshire. There are concerns regarding its viability. There is potential for the site to be developed in tandem with Brownfield sites C30, C31 and C32, which should be explored further although they individually were not assessed as being sites for further evaluation Aggregating a number of sites may improve commercial deliverability of Stanion Plantation, whilst stimulating regeneration in the southeast/east sector of the town.

East Northamptonshire

10.135 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. Site E7 at Northampton Road, Rushden (6.1ha), provides an immediately deliverable opportunity to extend existing high quality industrial/office development undertaken in Rushden over recent years.

10.136 As part of a mixed commercial / residential development to the northeast of Raunds, employment delivery should be regarded as appropriate at Raunds north/north east sector E3. As currently proposed, the employment area will amount to some 26.0 ha. The site provides an opportunity for mixed-use commercial development on a phased basis.

10.137 Potential extension to Warth Park E2 (33.5 ha) provides a potential opportunity for larger scale warehouse delivery by adding to the original development. It is important to place this within the context of providing only the most suitable sites for B8 development. It is apparent Warth Park has been able to attract demand from outside Northamptonshire, particularly from the east, (from centres such as Huntingdon, Peterborough and Cambridge). This is often not just restricted to high bay large scale warehouse development but a wider range of flexible distribution and industrial enquiries which is encouraged by the developers. The strength of the location is further evidenced by recent and proposed future extensions on-site by existing tenants.

Daventry

10.138 There is potential to increase the area available for employment land in the south east area of Daventry - Marches/ Burnt Walls; D6; D28 (14 ha). Re-evaluation is subject to the outcome of recent inquiries and further masterplanning work. This area provides an opportunity to deliver high quality employment development and we consider that such potential on land near Burnt Walls could be re-examined. There is further potential on land at Apex Park - D2 (35 ha).

10.139 A number of potential high quality employment sites are identified at and adjacent to Crick, serviced by Junction 18 of the M1 motorway. This is a high quality location and continued pressure for occupier-led development in this area is anticipated. Considerable care will be needed to optimise the economic benefits without causing excess damage to the rural character of surrounding villages which is a significant threat in this part of the county.

South Northamptonshire

10.140 In Towcester, S12 Land South and West of Towcester (20.6ha) is part of a proposed major SUE which includes employment proposals south of Towcester on the A5 and to the west serviced by the proposed new bypass link. Whilst significant infrastructure is required for delivery, S12 has the opportunity to provide a range of good quality employment. Land at Burcote Wood Farm S17 (24.5ha) is being promoted and has potential for B-uses.

10.141 More immediately available are sites near the A43/A5 junction to the north of Towcester. Land South of Jacks Hill Cafe S42 (8.5 ha) may be more deliverable in the short term than sites S12; S17 to the south and west of Towcester. In addition, Burcote Road S3 to the southern end of the central area of Towcester close to the A5 provides an opportunity for further good quality employment delivery.

10.142 At Brackley, sites S9, S13, S18 and S22 (totalling 28.2 ha) have been identified, all of which would provide high quality employment locations. Brackley has additional potential from the High Performance Engineering and the Motor sport Sector, which is expected to continue to draw sub-contractors and suppliers into Northamptonshire.

10.143 Land near Junction 16 (site S16 – 150ha) lies in South Northamptonshire but, if developed, would significantly influence the Daventry and Northampton labour markets. The location has been identified in the emergent West Northamptonshire Joint Core Strategy as a potential strategic employment site. This includes around 60% for B8 purposes leaving a significant residue of land for offices, light industrial, general industrial, special industrial and non B space uses. Similar to other large potential sites in the SELA, the promotion of the site is at an early stage and concerns expressed by some public sector partners largely relating to sustainability issues will need to be fully addressed during the next-stage evaluation process recommended in this report.

Northampton (and wider Northampton Implementation Area)

10.144 We have conducted the study on the premise that the town centre sites be considered together to form a single strategic ‘site’ in view of the importance of upgrading the overall offer of the County town as a major business location.

10.145 It is equally important that a number of out of town employment sites are brought forward for development. Continued pressure for development which has the potential for being mainly occupier-led is anticipated around Grange Park (in South Northamptonshire) which has excellent accessibility southbound on the M1 (sites S36 and S37 totalling 18.1ha).

10.146 Other sites which will complete the South West District include Swan Valley (sites N8; N25; N26 and N28 (19.1ha), Pineham East (site N24 totalling 14.0ha) and Upton/Upton Lodge/Upton Park (sites N6; N15 and N16 totalling 10.8ha).These will complete the south west district 170ha strategic employment site.

10.147 There is the potential for a significant employment land allocation to the east of Northampton, building on the existing successful Brackmills and Lakes developments. Sites N10, N13, N14, N16, N37, S30 and potentially others yet to be identified could be brought forward in such a way to maximise the linkages between them and provide a development zone of over 100ha. This seems to have significant merit to be considered as an additional strategic site for the county, although significant land assembly and infrastructure constraints would need to be addressed. It might also provide a potential option for a Technology Realm hub site. Furthermore, the support of the HCA would be of particular importance in delivering this option as a strategic location. We consider that site N14 provides the opportunity for early delivery of prime employment within this wider area.

Public Sector Intervention and Enabling Activity

10.148 Having identified the scale and nature of future employment need and the inability of existing allocations to meet this need, it will be critical that the new portfolio of good quality existing allocations and recommended new allocations is supported by significant enabling activity from the public sector. This must also reflect the more positive approach to employment land planning, notably by operating in accordance with the emerging PPS4 view that that planning applications for economic growth should be considered favourably unless there is a good reason to believe the costs outweigh the benefits

10.149 Interventions and enabling measures to support the delivery of sustainable economic growth should aim to:

- facilitate the provision of the right sites in the right places where and when the market is likely to fail without public sector intervention;
- accelerate the timescale of bringing forward key sites and premises to market in order to contribute significantly to meeting the county's preferred economic scenario;
- ensure the delivery of high quality jobs that will add significant value to and assist in diversifying the Northamptonshire economy;
- bring forward key sites in town centres or close to major public transport hubs with significant employment generating component; and
- enable sustainable economic growth and diversification in market towns and rural villages where market failure is evident.
- Seek innovative solutions to bring forward development, potentially including Accelerated Development Zones.

10.150 Northamptonshire has the opportunity to be a leading centre for new commercial development which seeks to maximise environmental sustainability, for example, being home to the I-Hub. Activities must minimise environmental impact, whilst seeking to demonstrate best practice in new construction techniques. Work previously undertaken by NEL, "*The Workstyles Trend Report*" [14] highlights the potential impact that high quality design and modern forms of business accommodation can have on business success. The report highlights a need to provide flexible accommodation able to meet the changing needs of modern business, whilst also providing innovative network and ICT solutions to business practices. Such developments can provide the county with a competitive advantage in attracting high-value industries.

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[14] http://www.northamptonshireobservatory.org.uk/projects/projectdetail.asp?projectid=66

10.151 Consideration of such principles could be a routine concept in developing sites and premises in the future to this extent all new strategic employment sites should make use of the ICT toolkit [15] to provide maximum potential for connectivity. This should also be considered in line with any emerging national, regional and local initiatives to maximise the supply of and take up of high speed ICT

10.152 Furthermore, given Northamptonshire's growth area status, a key action will be for public sector partners to identify and pilot new initiatives to bring forward high quality development of all types. For example, but not by way of exclusion, the county must be seen as "*leading edge*" in adopting new initiatives (promoted both nationally and internationally) which will help to address the county's employment needs.

10.153 Subject to State Aid rules, local authorities, delivery vehicles and other public sector partners should seek to utilise innovative solutions to bringing forward high quality developments. In some cases the market will bring forward such sites, but where there is a clear economic requirement and impact from developments the public sector should work with private partners to ensure that the county has a sufficient level of commercial sites and premises to meet the needs of businesses and achieve sustainable economic growth. Intervention and enabling measures may include:

- land acquisition and direct development;
- gap funding;
- up-front / early infrastructure provision;
- redistribution of Section 106 funds, including consideration of the appropriateness of section 106 funds of Community Infrastructure Levy (CIL) where such requirements can be demonstrated to make developments unviable.
- grant support for upgrading and refurbishment;
- grant support for land remediation and site preparation;
- special Joint Venture initiative, such as the successful Fit For Market scheme and further consideration of the Asset Backed Vehicle model. Local asset backed vehicles (LABVs)1 are special purpose vehicles owned 50/50 by the public and private sector partners with the specific purpose of carrying out comprehensive, area-based regeneration and/or renewal of operations
- Business Improvement Districts (BIDS) Northamptonshire already has a number of Business Improvement Districts in existence, including on the Brackmills Industrial Estate. Consideration should be given to bids on additional major employment locations and also when considering the development of any new business parks, subject to BIDs legislation and business desires.
- Tax Increment Financing (TIF) TIF is a mechanism for using anticipated future increases in tax revenues to finance the current improvements (such as new or improved infrastructure) that are expected to generate those increased revenues. TIF works on the principle that the supply of new or improved infrastructure usually leads both to new development and to an increase in the value of surrounding property, both of which serve to increase the level of property taxation in the area. Within a designated TIF district, this anticipated increased taxation (the 'tax increment') is captured and used to fund the infrastructure that has been provided.

[15] http://www.emda.org.uk/icttoolkit/

- targeted and responsive business support and inward investment services aimed at efficiently meeting investor and occupier needs with the right sites in the right location at the right time;
- facilitating and encouraging greater choice of freehold sites;
- provision of enterprise units in rural towns and villages.

10.154 Clearly, central to the public sector's ability to take a comprehensive enabling role will be the:

- availability of regeneration and development funding; and
- need to establish efficient and effective mechanisms for managing and delivering intervention / enabling actions.

10.155 In order to facilitate the timely development of key, market-focussed employment sites as well as targeted regeneration of existing industrial sites in the county, we consider it imperative that Northamptonshire is given significantly enhanced access to regeneration and employment development funds. Whilst the current 'Fit for Market' Programme has been effective, and should be continued, the scale of funds available is insufficient to deliver the step change in employment creation required in Northamptonshire. Consequently, highly effective steps should be taken to pursue significant funds from a wide range of sources including:

- Homes & Communities Agency (e.g. Growth Area Fund and Community Infrastructure Fund);
- CLG;
- East Midland RDA; and
- Private sector (via Section 106 funds and Joint Ventures).

Monitoring

10.156 In implementing the recommendations of the SELA and in moving forward towards meeting the jobs growth targets established, the role of an effective monitoring system is essential. In view of the importance of monitoring, the Planning and Compulsory Purchase Act 2004 requires every local planning authority to make an Annual Monitoring Report to the Secretary of State containing information on the implementation of the Local Development Scheme and the extent to which the policies set out are being achieved. Within this context monitoring is becoming an increasingly important aspect of evidence based policy making and must be seen as a continuous process in the development and implementation of successful planning and wider economic development policies.

10.157 Providing a robust evidence base founded on monitoring activities will be the primary means of monitoring employment land development in the county support the delivery of the County's Joint Core Strategies. This should be coordinated by the county's JPU's. This will require the commitment of sufficient resources by local authorities and key stakeholders such as NEL and should be reflected in the Joint Core Strategies and emerging Local Development Frameworks. The provision of robust monitoring data through this process would be a significant element of any future reviews of the SELA.

10.158 In line with CLG guidance, monitoring should be aligned to both national and regional guidance. As a minimum, employment monitoring, through the Annual Monitoring Report, must report on the following Core Output Indicators[16]:

- BD1: Total amount of additional employment floorspace – by type
- BD2: Total amount of employment floorspace on previously developed land – by type

[16] DCLG (2008) *Regional Spatial Strategy and Local Development Framework: Core Output Indicators – Update 2/2008*

- BD3: Employment land available – by type
- BD4: Total amount of floorspace 'for town centre uses'

10.159 At the regional level, an online monitoring portal is used by the LPAs to submit the data required to inform the production of the East Midlands Regional Plan AMR (known as *CDPVision*). The economic indicators against which the Region seeks data are closely aligned to the CLG Core Output Indicators above. Alongside Employment Land information, the Region also requests data on changes to both Leisure and Retail land and so the monitoring of these areas need also be a feature of the SELA monitoring framework. The Regional monitoring requirements are specified below:

- Employment Land Gains
- Employment Land Losses
- Leisure Land Gains
- Leisure Land Losses
- Retail Land Gains
- Retail Land Losses

Additionally, take-up should be classified (at least indicatively) according to the typology of sites recommended in the study (see Appendix H).

10.160 Through the respective Joint Planning Units, the Northamptonshire LPAs have agreed to the procurement of an additional monitoring software tool: *CDPSmart*. This software has been secured to ensure consistency across Northamptonshire in terms of the collection of planning data and its reporting. It is linked to existing LPA development control systems. This allows local data to be fed into CDPSmart and agreed fields be populated accordingly, according to monitoring needs. From this process, ascertaining the effects of policies is facilitated as it shall be easier to extract planning data through use of both common, and bespoke, reports as well as consistency of approach across the county.

10.161 The monitoring framework should also provide the basis for ensuring that sufficient land of the required quality is being made available to the market. This should include the identification of at least 5 years good quality future supply (against forecast) in order to provide the market with sufficient choice and flexibility. Good quality sites should be identified by the monitoring system in accordance with the site provision recommendations made in this study.

10.162 In addition to monitoring employment land, it is important the partners such as the JPUs LPAs, Delivery Vehicles and NEL work together to support wider economic monitoring which must be co-ordinated and consolidated for optimum results. For example the emerging Local Economic Assessment will consider a wide range of socio-economic data that aligns closely to the wider requirements of various spatial strategies. This includes data on employment by sector, economic activity rates, worklessness and areas of deprivation. This adapt should be aligned with other monitoring activities with a planning and economic nature, such as LAA target monitoring.

10.163 In ensuring that Northamptonshire has a balance of supply and demand for employment land, it is important to note current vacancy levels of the existing commercial stock. This data is currently not widely available and Local Authority partners should work together to develop an effective monitoring system for the county. Data on commercial vacancy details can come from a number of sources, including local business rates teams, the Valuation Office Agency and local commercial agents as well as Invest Northamptonshire property schedules. A co-ordinated approach between local authority departments should be made to ensure that consolidated vacancy data and new registrations is available for future employment land reviews. This must comply with any data protection requirements.

10.164 Where possible all data should be made available to the Northamptonshire Observatory, in addition to Local Planning Authority websites to maximise the use of data. Key site and application data should be collected at the point of application and registration to avoid un-necessary research at the end of the year. This would follow the accepted principle of "collect data once and use numerous times (COUNT)". This supports the provision of a coordinated approach to data provision by the LPA partners and the JPU's.

10.165 Further to the monitoring details above, Local Planning and Economic Development partners must also work to provide robust data on the specific issues highlighted through the SELA. Specifically this must address key issues such as the step change needed in the provision of B1 office space, town centre performance and development in these locations and the level of development and demand in the B8 sector linking to the differing scales of B8 development and existing vacant stock. This is in-line with the monitoring requirements set out in Draft PPS4 (2009).

10.166 Partners should work together to maximise the availability of data, and where appropriate new systems of planning monitoring should be introduced to collect the employment land information on these new employment geographies. For example the Northampton Implementation Area (NIA) may need the development of new monitoring systems and boundaries to cover the potential NIA, which may cover a number of existing wards and administrative boundaries. This is particularly important when considering wider economic data analysis which is often only available at district level. This situation can arise in many cases where partners are seeking to monitor functional economic geographies