Greater Nottingham Planning Partnership

Preferred Approach: Employment Background Paper

December 2022

Broxtowe Borough Council

Gedling Borough Council

Nottingham City Council

Rushcliffe Borough Council

Contents

Introduction

1.1 The Councils (Broxtowe Borough Council, Gedling Borough Council, Nottingham City Council and Rushcliffe Borough Council) are currently consulting on the Greater Nottingham Strategic Plan Preferred Approach. This Preferred Approach consultation document puts forward the Councils' preferred options for allocating strategic sites within the Plan Area. This consultation stage is part of the preparation of the emerging Greater Nottingham Strategic Plan with the next stage being consultation on the draft plan. This Employment Background Paper provides detail on the employment and economic evidence supporting the Preferred Approach in particular whether there is sufficient employment land to meet forecast needs and of the right quality in the right locations and more specifically any need for strategic employment sites or employment land as part of mixed use strategic allocations. It also considers the need for large scale logistic/distribution facilities and reports on the recommendations from the consultants ICENI – Nottingham Core and Outer HMA Logistics Study 2022.

1.2 The Councils commissioned Lichfields to undertake an employment land study called the Nottingham Core and Outer HMA Employment Land Study 2021. This study covers both the Nottingham Core Housing Market Area and the Nottingham Outer Housing Market Area both of which are identified in the study as being coherent Functional Economic Market Areas (FEMAs) the geographical area across which local economies and markets actually operate. The Nottingham Core Housing Market Area comprises the following Councils: Broxtowe Borough Council, Erewash Borough Council, Gedling Borough Council, Nottingham City Council and Rushcliffe Borough Council. The Nottingham Outer Housing Market Area comprises Ashfield District Council, Mansfield District Council and Newark & Sherwood District Council.

1.3 The Nottingham Core and Outer Housing Market Area Employment Land Study 2021 (ELS) prepared by Lichfields provides evidence on the quantity of employment land to be planned for over the plan period 2018 - 2038. ELS has also assessed the quality of key employment sites in the study area. This approach looking at both demand and supply enables the Councils to consider whether there are any gaps in the provision of employment sites. The ELS is available here: https://www.gnplan.org.uk/evidence-base/

1.4 In addition to quantitative considerations, the "is there enough employment space to meet need" question, there is also the question of whether sites of the right type and quality are in the right places to meet demand and/or to achieve specific policy objectives and more specifically the need for any strategic employment sites or strategic employment allocation on a mixed use strategic site.

1.5 This Employment Background Paper is structured around whether the HMA is a functional economic market area, the quantitative need for employment space, the distribution of employment space, the balance between labour demand and supply and qualitative needs. Within this overall structure, the key findings of the ELS report are summarised and where relevant the paper sets out the Councils' response to the numerous recommendations set out in the ELS report. In particular, taking into account the ELS findings it sets out:

- The Councils' consideration of whether the HMA is a functional economic market area;
- The Councils' preferred growth scenario;
- The Councils' approach to adjusting the employment space growth forecasts for future employment losses;
- The Councils' approach to the distribution of employment space between the Partner Councils;
- The Councils' response to the implications of the new class E; and
- The Councils' approach to strategic distribution needs.

1.6 A consultation on the Greater Nottingham Strategic Plan Growth Options Document was undertaken by Broxtowe, Gedling, Nottingham City and Rushcliffe Councils and this document along with the Report of Consultation is available on the website - https://www.gnplan.org.uk/

1.7 A brief summary of key issues raised in relation to employment and employment space is set out in this Employment Background Paper. A key concern raised relates to the impact of COVID-19, which is addressed elsewhere in this Employment Background Paper.

1.8 References to the Councils in this Employment Background Paper includes Broxtowe Borough, Gedling Borough, Nottingham City and Rushcliffe Borough unless specified otherwise. References to 'employment space/uses' and 'employment-based sectors' refer to the following uses which is consistent with the ELS:

- Office: including offices in Eg(i)– former B1(a) - Use Class and research & development in Eg(ii) – former B1(b) - Use Class.
- Industrial: including light industrial in Eg(iii)– former B1(c) - Use Class and industrial and manufacturing space in B2 Use Class.
- Distribution: including storage and distribution, warehousing and wholesale uses typically in B8 Use Class.

Consultation on the Greater Nottingham Growth Options Document: Employment issues

1.9 The Councils consulted on the Greater Nottingham Strategic Plan Growth Options document during 2020 with an extension to the original consultation occurring during the early part of 2021. Amongst the comments made some have relevance both to ELS and this Employment Background Paper including:

- The need for a new employment land study to be commissioned;
- The impact of COVID-19 especially the implications of more working from home;
- Need to take into account the new Use Class E;
- The omission of references to major logistics facilities in the Greater Nottingham Growth Options document;
- Site-specific comments by developers promoting particular sites including sites along strategic road corridors such as the M1, A60 and A46 including their suitability for strategic and more general B8 warehousing.

1.10 The ELS addresses some of these concerns directly including for example, the need for a new employment land study, impact of COVID-19 and implications of Class E. The Councils' position on COVID-19 in relation to the findings of the ELS report is set out in the following section. The issue of strategic distribution is addressed in the ELS and in this Employment Background Paper.

Impact of COVID-19

2.1 The ELS assesses the impact of COVID-19 by referencing the most recent macro-economic forecasts released by Experian at the end of September 2020. These projections reflect the ‘Delayed-V-shape’ scenario, which is Experian’s base case. This base case ‘delayed V-shaped’ recovery scenario implies an overall Gross Domestic Product (GDP) reduction of 11.7% for 2020, following the sharp decline recorded in April as lockdown measures and social distancing stifled consumer spending followed by a delayed recovery of 3.2% GDP growth per annum 2021-2027. Local area forecasts released by Experian in September 2020 provide an up-to-date view on the impact of Covid-19 for the study area. Though viewed as a very significant, albeit hopefully temporary, shock the forecasts imply a significant impact on all sectors of the economy and all parts of the study area.

2.2 The latest economic forecast from the Office for Budget Responsibility ((OBR) Economic and Fiscal Outlook March 2022) reports that the UK has now returned to its pre-pandemic levels of activity with economic output regaining its pre-pandemic level in January 2022. The delayed V shape economic scenario used in the ELS forecasting is consistent with these findings. The OBR forecast in March 2022 forecast a sustained recovery but noted the increasing threats from inflation particularly from rising energy costs as a consequence of the Russian invasion of Ukraine. The latest economic outlook from the Bank of England (Monetary Policy Report August 2022) bears out these economic threats noting that inflationary pressures in the United Kingdom and the rest of Europe have recently intensified largely reflecting a doubling of gas prices owing to Russia’s restriction of gas supplies to Europe. Inflation is now expected to rise to over 13% in the fourth quarter of 2022. Economic growth in terms of GDP is slowing and the United Kingdom is now projected to enter recession from the fourth quarter of 2022 with falls in output in each quarter from 2022 Q4 to 2023 Q4. Consequentially unemployment nationally is forecast to rise and such a rise is also likely to occur locally.

2.3 At the time of writing, as the Bank of England notes in its aforementioned report “the uncertainty around the outlook is exceptionally high, especially for energy prices”. This high level of uncertainty makes economic forecasting particularly difficult at present. However, as explained in this Background Paper the ELS forecasts uses a number of scenarios to predict a range of employment outcomes. Given the need to recover from the impact of the Covid-19 pandemic and to counter the likely onset of a national economic recession which will impact locally the Councils have opted to plan for employment levels towards the upper end of the ELS forecasts (see section on the Quantity of Employment Land).

2.4 The ELS has also considered whether the current shift in working patterns will transform into a longer-term change of more people working from home with knock on effects in terms of demand for workspace. The consultants consider that it is too early to tell. The 2015 Homes and Communities Employment Density Guidance note is used by the study to translate jobs into floorspace. This guide provides employment densities associated with different types of property use, and it has been found to be a robust guide to employment land densities underpinning numerous Employment Land Reviews across the country. As a part of this, an element of home working and ‘hot-desking’ is already factored into the employment densities, although nowhere near current levels.

Policy Context

3.1 The Policy context is clearly set out in ELS chapter 2, which summarises the key requirements of the National Planning Policy Framework and key guidance in the national Planning Policy Practice.

3.2 ELS Chapter 2 also refers to the other relevant strategies and studies notably the D2N2 Local Economic Partnership's Strategic Economic Plan (SEP) Vision 2030 which is a comprehensive economic strategy for the region, forming the basis for future investment decisions by the LEP and its partners (D2N2 is the Local Economic Partnership for Derbyshire and Nottinghamshire). Reference is also made to the Draft D2N2 Local Industrial Strategy [LIS] which was submitted to the government in March 2020 and covers the same time period as the Vision 2030. It sets out a limited number of focused, evidence-backed priorities, which will help drive the region towards the vision, and targets set out in the SEP. This chapter also outlines important local studies and strategies taken into account in the ELS.

Functional Economic Areas

Is the Nottingham Core Housing Market Area a Functional Economic Area?

4.1 It is considered that the Nottingham Core Housing Market Area (HMA) is a Functional Economic Market Area (FEMA) – paragraph 4.41 of the ELS states that:
"On balance, it is considered that the Core HMA forms a self-contained FEMA. Despite the FEMA tests indicating a slightly less conclusive result once applied to three Outer HMA districts, an argument can be made that the Outer HMA is also a self-contained FEMA. With regards to Hucknall, as with the previous 2015 ELFS, this study considers that whilst it is within the administrative boundaries of Ashfield/Outer HMA, Hucknall is highly connected to the Core HMA and could be viewed as being located within that FEMA"

Quantity of Employment Land

5.1 This section goes through a number of key findings from ELS in order to answer the question - How much employment space should be provided for the HMA as a whole and for each Council? There are a series of steps:

- Which growth scenario should the Councils choose?
- What adjustments should be made to the resultant employment space needs derived from the preferred scenario to estimate the “Planned Requirements”? This includes adjustment for “losses” of employment land and to provide a “margin” for choice
- Rebasing the Planned Requirements to match with the housing provision base year of March 31st 2022

What is the Councils’ Preferred Growth Scenario?

5.2 In order to fulfil the requirements of national planning policy and the national planning guidance, ELS uses a variety of scenarios to assess a range of employment space needs for both industrial/warehousing space and office floorspace.

- Baseline employment forecasts (labour demand), using Experian’s Local Market Quarterly Forecasts for September 2020 (compared to the pre-Covid-19 March 2020 projection);
- Trending-forward past jobs growth experienced in the districts over the long term, from 1997-2018;
- Regeneration-led econometric model, which factors in the priority sectors targeted in the D2N2’s “Spark in the UK’s Growth Engine Strategic Economic Plan - 2019-2030”. This refers to 11 priority sectors important to the D2N2 economy for different reasons and which require different interventions in order to effectively contribute to productivity growth;
- Estimated growth in the local labour supply and the jobs and employment space that this could be expected to support. This is based upon the Government’s standard methodology for calculating housing need; and,
- Consideration of past trends in completions of employment space based on monitoring data collected by the Councils, and how these trends might change in the future.

5.3 It should be noted that the above scenarios include both forecasts that take into account policy interventions such as the D2N2 Strategic Economic Plan within the regeneration scenario whilst others based on past trends alone provide projections of job growth. The following table sets out the total jobs forecast or projected under each scenario to provide an indication of total employment demand for office, industrial, warehousing and other jobs such as in the retail and health sectors. This approach allows for the examination of the overall job growth to allow comparison between job demand and potential labour supply as well as the growth and floorspace requirements that can be derived from these estimates for particular sectors. The balance between the labour demand and labour supply is examined in a separate section below.

Table 1: Job forecasts for the various scenarios

Scenario	**Total jobs forecast or projected**
Labour demand base March 2020	58, 700
Labour demand post Covid-19 September 2020	49,600
Labour demand regeneration scenario	58,608
Past trends 1997 - 2018	42,130
Labour supply 2014 household projections	40,500
Labour supply Standard Method with affordability uplift	59,100

Source ELS: Tables 8.3, 8.5, 8.7, 8.10, 8.12 and 8.13

Summary of scenarios and numbers of additional jobs

5.4 The labour demand scenario forecasts provide a range of jobs between 49,600 and 58,608. The labour supply scenarios forecast 40,500 to 59,100. Projections based on actual changes in employment across the HMA recorded for the period 1997 – 2018 indicate 42,130 additional jobs created. The scenarios use different methods and provide a range of job projections. However, the scenarios align reasonably well and indicate a growth in employment of around 50,000 on average.

5.5 The Councils consider the forecasts provide a robust guide of the likely scale of employment growth to plan for and which needs to take into account the Councils' policy approaches towards sustainable employment and housing growth. In this context, the regeneration scenario which takes account of the D2N2 LEP's SEP policy interventions aligns closely with the labour force derived from the housing need based on the standard method (plus the affordability uplift) used by the Councils to assess housing need. Both of these scenarios indicate a demand or need of around 59,000 jobs by 2038.

5.6 The various scenarios are translated into floorspace requirements based on assumptions about which sectors would require floorspace provision namely the office and industrial/warehousing sectors formerly known as the B class sector. These two sectors account for approximately a third of total job growth. Other jobs in the non-B class sector make up the remainder but do not tend to require office and industrial/warehousing space as they occur in sectors such as retail, health or leisure.

Margin for choice or “flexibility factor”

5.7 ELS recommends a margin of additional employment space to provide a degree of flexibility and choice to ensure the smooth operation of the employment space market. This allowance is equal to the equivalent of two years of take up for each Council which is a standard assumption commonly used for employment land studies. The Councils accept the recommendation.

Why the regeneration scenario?

5.8 The Councils are of the view that the regeneration scenario is the most appropriate level of growth to plan future employment space requirements for the following reasons:

- Councils are active partners of the D2N2 Local Economic Partnership and engaged in the preparation of its Strategic Economic Plan (SEP) and Local Industrial Strategy (LIS). In this context, the emerging GNSP and wider corporate plans and policies of the HMA Councils are intended to complement the policy aspirations set out in the D2N2 SEP and vice versa;
- The regeneration scenario derived in the ELS builds in assumptions that take account of the policy interventions identified by D2N2 and its partners set out in the SEP/LIS;
- In comparison with the labour supply scenario, the regeneration scenario assesses the actual demand for employment or jobs and hence can directly translate into likely employment floorspace demand as opposed to focussing solely on the supply side i.e. the supply of potential labour which is indicative of the number of jobs required to sustain the labour force;
- The regeneration scenario is more forward looking than the other scenarios and not solely based on past trends in employment growth or past trends of employment space take-up;
- The regeneration scenario taking into account policy interventions which would assist in addressing the economic impact of COVID-19 and the likely onset of a national economic recession due to the increasing costs of energy is considered the most appropriate scenario on which to base the employment land provisions. In this context, the regeneration scenario assessment of employment space is regarded as a minimum figure for the purposes of the employment provisions set out in the Preferred Approach.

What should the Planned Requirements be?

5.9 In order to provide a figure to actually plan for adjustments are made to factor in losses (so called as it takes into account employment space “lost” as a result of a change of use to other uses). This results in an estimate of gross requirements i.e. takes into account future losses of employment space resulting in a change of use so that older obsolete floorspace is replaced to avoid an aging stock. As stated above, the Councils consider the regeneration scenario is the appropriate growth option to which a number of adjustments are made to arrive at the minimum level of "planned requirements" set out in the Preferred Approach: Employment Development and Economic Development.

Adjusting for employment space Losses

5.10 Paragraph 8.81 of the ELS states that the Councils will need to take a view on the extent to which additional space should be planned for over and above the net requirements, in order to allow for replacement of ongoing losses of employment space during the Local Plan period.

5.11 Paragraph 8.82 of the ELS states:
"Determining an appropriate scale of re-provision is a judgement for the councils to make to align with their particular economic growth and strategic policy considerations. Nevertheless, there are a number of data sources that can be scrutinised to provide some guidance as to what an appropriate level of re-provision might be. These include identifying how much employment land is in the pipeline to be lost to alternative uses (from reviewing extant planning applications and Strategic Housing Land Availability Assessments - SHLAA); reviewing past trends and assessing whether this is likely to continue for the foreseeable future; and a 'rule of thumb' approach looking at the size of the local property market and the extent to which there needs to be an element of replacement of a certain proportion of the current commercial/industrial stock to ensure that portfolio does not become increasingly obsolete".

5.12 ELS Recommendations for each Council are as follows (see ELS paragraph 8.85)

Broxtowe

- It is recommended that the mid-point of the past trend losses (1,276 sq. m per annum of offices and 4,263 sq. m per annum industrial/warehousing) and the adjusted 1% replacement of stock (560 sq. m office, 3,232 sq. m industrial/warehousing), is projected forward over the plan period. This equates to the replacement of 918 sq. m of offices and 3,747 sq. m of industrial / warehousing floorspace per annum;

Gedling

- It is recommended that the current SHLAA estimation of losses is replaced over the plan period (c. 2,100 sq. m per annum or 42,000 sq. m in total over 20 years). This is also reasonably close to the mid-point between the recorded losses (879 sq. m per annum) and the 1% churn figure (4,096 sq. m per annum). Taking the current split of existing stock, this equates to the replacement of around

193 sq. m per annum of office floorspace and 1,907 sq. m per annum of industrial/warehousing floorspace.

Nottingham City

- It is considered that a continuation of past losses could result in an over-provision of land, whilst the SHLAA/officer recommendation alone may be insufficient given the size of the local economy and the age of the existing stock. As such it is recommended that the mid-point of the past losses and officer estimated losses be taken forward in this instance (15,376 sq. m per annum, which is similar to the previous replacement level in the 2015 ELR): office: 7,183 sq. m per annum, or 143,658 sq. m over 20 years; industrial / warehousing: 8,193 sq. m per annum (2.05 ha), or 163,860 sq. m over 20 years (40.97 ha).

Rushcliffe

- It is recommended that in the absence of data on specific future losses from the Council, the mid-point of the past losses and adjusted 1% churn be taken forward in this instance: office: 614 sq. m per annum, or 12,272 sq. m over 20 years; industrial / warehousing: 2,451 sq. m per annum (0.61 ha), or 49,022 sq. m over 20 years (12.26 ha).

Councils' approach to adjustments for employment space losses

5.13 The ELS report makes a number of recommendations, which have taken into account the particular circumstances for each Council as reproduced above and apart from Nottingham City, these are accepted.

5.14 For Nottingham City the recommendation takes account of officer estimated future losses that includes employment space, which is anticipated to change use to residential, and other uses including commercial use. Nottingham City Council considers that this estimate of future losses would result in too a high level of replacement as changes of use to commercial uses provides employment and reflects the changing trend towards a more service orientated local economy. Consequently, it is considered that planned requirements should include an element of floorspace for changes of use to residential only as this use would not provide employment. On this basis, future losses of industrial and warehousing land to residential are estimated at 7,700 sq. m on 1.925ha of land per annum (154,000 sq. m or 38.5 ha over 20 years) and for office 3,000 sq. m. per annum (60,000 sq. m over 20 years).

5.15 As stated above, the Regeneration Scenario is the Councils' preferred range to plan for future employment space. Tables 2 and 3 take the upper end of the regeneration scenario needs for industrial/warehousing requirements and office requirements separately and show the adjustments for flexibility and losses to provide the gross or planned requirements. Turning to replacement for losses, with the exception of Nottingham City, replacement for “losses” are based on the ELS recommendations. For Nottingham City, the calculation is set out in the paragraph above.

Table 2: Regeneration Scenario - Gross requirements Ha industrial/warehousing

	Broxtowe	**Gedling**	**Nottingham**	**Rushcliffe**	**Greater Nottingham**
Net	18.52	12.97	15.72	6.74	53.96
+Flexibility Factor	19.82	13.40	16.28	7.66	57.16
+Loss replacement	38.56	22.94	54.78	19.91	136.19
Total	38.56	22.94	54.78	19.91	136.19

Source: ELS Tables 8.29 – 8.34. Loss replacement for Nottingham supplied by Nottingham City. Note row totals for the flexibility factor and loss replacement are cumulative.

Table 3: Regeneration Scenario - Gross floorspace requirements: Offices

	Broxtowe	**Gedling**	**Nottingham**	**Rushcliffe**	**Greater Nottingham**
Net	17,720	8,630	129,040	36,910	192,300
+ Flexibility factor	19,081	10,727	134,545	38,042	202395
+ Loss replacement	37,445	14,583	194,545	50,314	296,887
Total	37,455	14,583	194,545	50,314	296,887

Source: ELS Tables 8.29 – 8.34. Loss replacement for Nottingham supplied by Nottingham City. Note row totals for the flexibility factor and loss replacement are cumulative.

Implications of New Class E and any need for adjustment

5.16 From 1st September 2020, the Government’s changes to the Use Class Order (UCO) came into effect, with Use Classes A, B1 and D being revoked, and a new Use Class ‘E’ (Commercial, Business and Service) being introduced as well as Use Class F1 (Learning and Non-Residential Institutions) and F2 (Local Community). This essentially means that shops, financial and professional services (not medical), cafés or restaurants, offices, research and development of products or processes and for any industrial purposes (which can be carried out in any residential area without causing detriment to the amenity of the area) fall under the new ‘E’ Use Class. This will allow E Use Class premises to change use without needing to apply for planning permission.

5.17 The ELS study was required to consider the implications of the new E Classes on Employment Land. Paragraph 10.36 of the ELS states that the Government has stated that the main driver of these changes has been the need to enable the repurposing of buildings in town centres and on high streets in order to revitalise town and city centres. Paragraph 10.37 states that it is expected that the new regulations will lead to an increase in premises changing use. While this could help to bring vacant units back into use, it also poses a risk that instead of creating diversity, less profitable or valuable uses may be priced out of town centres. Paragraph 10.38 states that there is also a risk of impacting prime frontages in the Nottingham Core/Outer HMAs' town centres. Should a large retail unit be repurposed for office use, then there is likely to be a break in the prime frontage, potentially having a negative impact on the attractiveness and coherence of town centres. There is also a risk of retailers being drawn out of the town centres to occupy vacant premises on business parks or industrial areas, thus competing with the town centre.

5.18 Paragraph 10.39 states that from a landlord's perspective, the new E Use Class represents an opportunity to secure the most valuable use for their assets. Premises falling into the E Use Class will benefit from being marketed across a number of sectors, widening the pool of potential tenants, which may give rise to some uplift in land values. Paragraph 10.40 states that landlords will likely be assessing whether the current uses of their assets maximise the possible rents that can be achieved through the increased flexibility. This may in turn drive up rents, potentially outpricing smaller businesses.

5.19 Finally, Paragraph 10.41 states that in practical terms, these changes to the new Use Classes Order are likely to mean that it is harder for Councils to prevent future losses of employment land, particularly office and light industry. Whilst this extra flexibility may well be beneficial to the development industry and help them to respond more rapidly and effectively to the current economic uncertainty, it also means that the eight Councils in the Nottingham Core/Outer HMAs cannot take for granted that their former B1a/b and B1c sites can be protected into the longer term with a simple policy designation. For this reason, it may be necessary for the Councils to factor in an additional level of flexibility to their land supply on top of the current need identified to offset any additional unforeseen losses that may occur as a result of an increasingly de-regulated planning system. Equally, they will wish to consider how key employment sites may be protected. For this reason, it may be necessary for the Councils to factor in an additional level of flexibility to their land supply on top of the current need identified to offset any additional unforeseen losses that may occur as a result of an increasingly de-regulated planning system.

5.20 The Councils do not consider that any additional space for flexibility in connection with new class E is necessary at this stage in the absence of evidence on the effect of the new E Use Class in terms of additional "losses" of employment land but will monitor change with a view to take action if necessary. The protection of key employment sites is, however, part of the Preferred Approach. Councils should consider the need to impose planning conditions when granting permission for office uses in order to prevent these office uses changing to other uses which would be unacceptable.

Planned Requirements

5.21 After taking into account, the flexibility factor and the Councils' preferred approach to losses as set out above but making no adjustment in connection with the changes to Class E, the Councils consider the following minimum employment land needs should be met across the HMA as set out in tables 4 (industrial/warehousing) and 5 (offices) below. The planned requirements based on the upper range of the regeneration scenario have been adjusted to a 2022 base in order to match with the housing provisions, which are based at 31st March 2022. This has been done on a pro rata basis by calculating the annual requirement for both office and industrial/warehousing space over the 20 year period and applying it to the 16 year period 2022 – 2038.

Table 4: Industrial/warehousing requirement 2028 – 2038 ha and pro rata 2022 - 2038

	Broxtowe	**Gedling**	**Nottingham**	**Rushcliffe**	**Greater Nottingham**
Target 2018 - 2038	38.56	22.94	54.78	19.91	
Pro rata 2022 - 2038	30.85	18.35	43.82	15.93	
Target rounded up	**31**	**19**	**44**	**16**	**110**

Target 2018 – 2038 taken from Table 2

Table 5: office requirement 2018 – 2038 sq. m and pro rata 2022 - 2038

	Broxtowe	**Gedling**	**Nottingham**	**Rushcliffe**	**Greater Nottingham**
Target 2018 - 2038	37,445	14,583	194,545	50,314	
Pro rata 2022 - 2038	29,956	11,666.4	155,636	40,251.2	
Target rounded up to nearest 1000 sq. m	**30,000**	**12,000**	**156,000**	**41,000**	**239,000**

Target 2018 – 2038 taken from Table 3

Conclusions on the quantity of planned requirements

5.22 The Councils consider the regeneration scenario adjusted for the reasons set out in the section above is the most appropriate level of growth to plan future requirements. The Councils' consider that this is the minimum figure that should be planned for and in summary results in the following need for employment space across the HMA:

- **110 ha** of industrial and warehousing land; and
- **239,000** sq. m of office space.

Distribution of employment land across the HMA

6.1 The tables below show the planned requirements (from Tables 4 and 5 above) and allows comparison with the estimated employment land supply for each Council and across the HMA as at March 31st 2022. This is shown separately for industrial/warehousing and for office in Tables 6 and 7 below.

Table 6: Industrial and warehousing planned requirements and supply ha 2022 - 2038

Industrial / warehousing requirements	**Broxtowe**	**Gedling**	**Nottingham**	**Rushcliffe**	**Greater Nottingham**
Target Hectares	31	19	44	16	110
Supply rounded	6	17	21	136	180
Surplus/minus	-25	-2	-23	120	70
allocation	**6**	**17**	**21**	**136**	**180**

Table 7: Office planned requirements and supply 2022 – 2038 sq. m.

Office requirements	**Broxtowe**	**Gedling**	**Nottingham**	**Rushcliffe**	**Greater Nottingham**
Target square metres	30,000	12,000	156,000	41,000	239,000
Supply rounded	10,000	7000	234,500	43,000	294,500
Surplus/minus	-20,000	-5000	+78,500	2,000	55,500
allocation	**10,000**	**7000**	**234,500**	**43,000**	**294,500**

6.2 In terms of industrial/warehousing supply there is a surplus of potential employment land across the Plan Area of approximately 70 ha. The allocations include a substantial amount of land identified at Ratcliffe-on-Soar Power Station. This is a large site of approximately 207 ha gross (approximately 121 ha net). This coal-fired power station, which opened in 1968, has a long history of power generation being part of the Trent Valley Power Stations network or "Megavolt Valley" and a major employer in the area. As one of the last remaining coal-fired power stations it is due to close in 2024 with the loss of a significant number of jobs. Uniper, the current owners, are in discussions with relevant Councils and other partners over detailed plans for the future of the site and to promote alternative employment. Current uses on site in addition to the power station include the Uniper Technology Centre, which carries out research on power generation. Planning permission has also recently been granted for an energy from waste incinerator called the East Midlands Energy Re-Generation (EMERGE) Centre –which is designed to burn almost 500,000 tonnes of waste a year, reduce landfill and generate enough energy to power 90,000 homes and to create around fifty jobs.

6.3 Rushcliffe Borough are at the early stages of preparing a Local Development Order (LDO) for the site to streamline the planning process and to specify the types of uses in clearly defined areas which would be permitted. The draft LDO, which was published for consultation in July 2022 provides examples of potential business that could locate on site, for example: industrial, manufacturing, low carbon and green energy generation, energy storage, advanced manufacturing, logistics, research and training facilities and the areas of the site where these uses could potentially be located Although the site is not presently categorised as falling within traditional B class uses it is a significant employment site in its own right with a number of employment activities on site continuing. In this context, it is not considered that the site represents entirely new employment land supply, as a large element would in effect be a redevelopment opportunity.

6.4 There is potential for large-scale employment provision at this site for both energy generation (zero carbon technology and energy hub for the East Midlands) and for modern industrial and manufacturing uses. The site benefits from access to high capacity utilities infrastructure. The LDO published by the Council indicates that up to 180,000 sq. m is being considered for B8 distribution/logistics (see also section on strategic logistics/distribution below). It is an early aspiration that redevelopment of the site is likely to take place in three main phases with phase 1 including underutilised areas to the north of the A453 and in and around the ash fields to the south. Phase 2 would follow the closure of the power station in 2024 when the land associated with the coal stockpile would be released. Finally Phase 3, from 2025 onwards following the closure of the main power buildings, cooling towers and other structures would be decommissioned and demolished and any necessary ground remediation undertaken. In this context, it is likely that completion of a significant part of the site would take place beyond the end of the Plan period.

6.5 The employment land allocation for Rushcliffe Borough set out in the Preferred Approach therefore includes a significant allocation at Ratcliffe-on-Soar Power Station with a developable area of around 79 ha which excludes existing energy related activities on site. This quantity of employment land of 79 ha is phased for delivery within the plan period. This quantity is justified on the basis that there is a need to replace existing employment on this site and it would also assist in meeting shortfalls elsewhere in the Plan Area notably Nottingham and Broxtowe Councils over the Plan period.

6.6 The position will be kept under review; however, as more certainty permits there may be a case for an increase in the allocation to be made for Rushcliffe Borough to provide more certainty for the future planning of this site at a future stage of the emerging Greater Nottingham Strategic Plan. In this context, it is not considered that any increase to the Rushcliffe employment land allocation to accommodate additional land being available at Ratcliffe on Soar Power Station would have implications for the planned level of housing provision in the Plan Area. This is on the basis that there is a need to replace land currently in use for energy generation and provide alternative employment opportunities through the redevelopment opportunity, which would provide a supply of employment land beyond the end of the Plan period.

6.7 Turning to the office sector, the supply across the HMA /FEMAis broadly in balance with likely demand and is more than sufficient in quantitative terms to meet the needs of the Plan Area with the focus being the large available supply within Nottingham City.

Conclusion on the general supply of employment space in comparison with the regeneration target

6.8 In quantitative terms, there is sufficient industrial/warehousing and office supply to meet the planned requirements across the HMA /FEMA.

Comparing labour demand and labour supply

7.1 The labour demand scenarios estimate the total number of additional jobs to be in the range of 50,000 – 59,000 (the regeneration scenario prediction is for an additional 9,000 jobs on top of the September 2020 Experian forecast). The labour supply scenarios estimate additional labour supply of 40,500 – 59,100. The upper end (59,100) being based on the ELS labour supply scenario utilising the local housing need and the affordability uplift which applies the same proportional uplift to the potential labour supply. However, the study is clear that there is no way of knowing whether the uplift to the local housing need assessment would result in additional people residing in the area and forming part of the labour force.

7.2 The average of the various scenarios for job growth is in the region of 50,000. Taking the top of the labour demand (58,600) and labour supply scenarios (59,100) as the most aspirational scenarios the two are broadly in balance. Taking the lower end of the ranges between the labour demand and supply scenarios results in a difference of approximately 9,500.

7.3 The ELS calculated the numbers of economically active people (and therefore jobs) using the 2014 household projections by applying projected economic activity rates to the equivalent sub-national population projections. These population projections underpin the household projections which are used in calculating the baseline number of homes in local authority areas as part of the standard method. This provides the baseline number of jobs which would be supported by the baseline number of homes. This baseline calculation forms the bottom end of the range in the ELS labour supply scenario while the upper end of the range is derived by applying the same “affordability” uplift to the labour supply as required for the local housing need.

7.4 The ELS considers the bottom of the potential labour supply range based on the standard method for calculating households as the minimum number of jobs expected. ELS regards the upper end of the range as the theoretical upper end of the jobs expected. Taking the mid-point of the range as being a reasonable compromise would result in a labour supply or jobs of around 50,000 for the Nottingham Housing Market Area. This aligns reasonably well with the average for all scenarios for the Nottingham Housing Market Area including the regeneration scenario where the mid-point is about 54,500. The Councils consider that on the basis of the evidence provided in the ELS report there is unlikely to be any significant shortfall in the labour supply in comparison with the likely demand for jobs across the Housing Market Area.

7.5 As noted in the Housing Background Paper the affordability ratio which forms part of the standard method is published annually, and the methodology also rolls forward a ten year period from the 2014-based household projections each year. This means that the housing need for Greater Nottingham changes each year, which makes strategic planning more challenging. The Government applies the standard method to calculate housing need and includes an urban uplift of 35% in the 20 largest cities which includes Nottingham. However, for the reasons set out in the Housing Background Paper Nottingham City cannot meet the whole of this 35% uplift to its housing figure. The issue of whether changes to affordability ratios, rolling forward household projections and not meeting the 35% uplift in full for Nottingham would render the ELS labour force calculations out of date is considered next.

7.6 As stated above, the ELS calculated the labour force in a consistent manner to the standard method for housing need including use of 2014 household projections, the affordability factor and the 35% uplift for Nottingham City. Although crude, it is possible to use the housing provision in the Preferred Approach for comparison with the level of housing need and resultant labour supply assumed in the ELS. The ELS report based its upper range labour supply calculation on the equivalent of 3,373 homes per annum for the whole of the HMA which also includes Erewash Borough (ELS Table 8.13). After deducting Erewash Borough's contribution to future housing need (assumed as 392 per annum by ELS) then the upper end of the labour supply assumed in the ELS for the Partner Councils is equivalent to 2,981 homes per annum. The Preferred Approach includes a housing target of 49,900 which equates to 3,119 homes per annum or 4.6% higher than ELS. This is very similar to the number of homes and resultant labour supply used in the ELS albeit slightly higher. In this analysis, the proposed housing buffer set out in the Preferred Approach of 10% for Broxtowe, Gedling and Rushcliffe Councils has not been added to the housing target for the purposes of the analysis in this Employment Background Paper as the buffer is to add flexibility to the housing supply to ensure the housing target is actually met and would not necessarily mean accommodating additional households and potentially adding to the labour supply.

7.7 Bearing in mind that additional homes resulting from uplifts to the base line housing need do not necessarily translate into more people moving in to the area, the housing provision in the Preferred Approach may slightly increase the upper end of the labour supply above that calculated by the ELS. Although it is not felt necessary to rerun the ELS model due to the fact that the difference is not that great it is likely that the midpoint of the labour supply forecast would be a little higher than the 50,000 jobs derived from ELS for the Housing Market Area. This would provide a better fit with the chosen jobs target based on the preferred scenario – the Regeneration Scenario (with a range of approximately 50,000 – 59,000 jobs) – and thereby help to reduce the risk of there being any shortfall in labour supply.

7.8 In summary for the Nottingham Housing Market Area as a whole, the labour demand and labour supply scenarios show quite strong alignment as demonstrated when comparing the midpoint of the labour supply range circa 50,000 with the midpoint of the jobs forecast based on demand being around 54,500 jobs. The Councils consider that the forecast demand for labour is broadly in balance with the forecast labour supply.

7.9 The Councils have opted to base the employment space provision on the regeneration scenario based on the labour demand model. This builds in the aspirations of local partners to tackle unemployment and underemployment, which is a priority. In this context, it is accepted that the regeneration scenario results in an overall number of additional jobs that is probably at the upper end of what could be achieved in aspirational terms.

7.10 Whilst the evidence set out in the Employment Background Paper and the ELS study does not indicate that the labour supply derived from the likely housing provision would result in a significant shortfall of labour in relation to forecast job demand across the Nottingham HMA, there is likely to remain a significant pool of unemployment potentially available to meet any possible shortfall. Economic activity rates in Nottingham City are well below the national and regional averages and lower than the surrounding Councils. Increasing economic activity rates particularly in Nottingham City is a key priority along with addressing unemployment. There is also a need to aid economic recovery following the pandemic and it is noted that the short to medium term forecasts in ELS factor in relatively high levels of unemployment in the modelling work, which would need to be urgently addressed.

Conclusions on labour demand and supply balance

7.11 Forecasting employment space is a difficult exercise and like all forecasting has limitations being highly dependent upon the variables inputted into the model, the assumptions used in the model and how these variables actually behave in practice. In general, such forecasts become less reliable over time especially when forecasting forward over the plan period. The ELS sets out the limitations of its forecasting method at paragraph 8.17. To a degree, all the scenarios rely on past trends and it is not always the case that the future will be similar to the past. This is especially true when hitherto unforeseen “events” such as the global pandemic or Brexit occur with their potential for disrupting existing trends in terms of job growth and trade and the inevitable uncertainties they pose for the forecaster.

7.12 However, the various scenarios are a good guide to what may happen in the future and the method employed is consistent with national planning policy and guidance in relation to assessing future employment space. Rather than relying on a single scenario or forecast, ELS utilises several different scenarios to give a range of potential outcomes in terms of job forecasts and employment space. The individual scenarios or forecasts are based on different methodologies but all result in a reasonably consistent range of figures for future employment growth and employment space that gives a robust “ball park” figure for the Councils to plan for within the range of 40,000 – 60,000 new jobs. Furthermore the midpoint of the labour supply scenario of around 50,000 aligns well with the midpoint of the labour demand scenario of approximately 54,500 and therefore the Councils consider that the regeneration scenario is the appropriate option.

7.13 The forecasts cannot take into account all the likely effects of policy interventions and it is the policy aspiration of the Councils to achieve the sort of job growth envisaged at the higher end of the job demand scenario range in order to assist in rebuilding the economy following the global pandemic. The employment space derived from the upper end of the ELS forecasts is therefore the minimum amount to be planned for in the emerging Greater Nottingham Strategic Plan. Given the limitations of the modelling identified above, that the scenarios are based on ranges rather than targets, and the fact that local plans are kept under review and regularly updated or replaced, this level of job growth is considered to be compatible with the planned levels of housing delivery.

Qualitative analysis

8.1 ELS has assessed 77 key employment sites and concluded that 52 sites covering 328 ha are of a good or very good standard with a further 14 sites covering 48 ha being considered as average or better. The summary assessment is set out in Table 7.2 of the ELS reproduced below.

Table 8: Table 7.1 Core HMA Site Scoring Summary (reproduced from ELS)

Site Score	Number of Sites	Size (ha) net
Very Good	12	27.74
Good/Very Good	1	0.15
Good	37	300.1
Average/Good	2	0
Average	14	48.2
Poor/Average	9	24.57
Poor	2	0
Total	**77**	**400.59**

Do we have the right type of sites of a sufficient scale in the right locations?

8.2 The question of whether there is sufficient employment space in quantitative terms has been addressed above. It is now appropriate to turn to whether there are sites of the right quality in the right places. The Preferred Approach is concerned with the allocation of strategic sites. Non-strategic sites may be allocated through Part 2 Local Plans. Strategic sites allocations (including sites with planning permission but not built) are defined as:

- Sites of 5 ha or more and/or 20,000 sq. m of office floorspace.

8.3 ELS assessed 77 key employment sites within the HMA including both strategic and non-strategic sites although less significant local smaller sites were not assessed. In general based on the ELS findings the majority of key employment sites are of average or good quality. The ELS at paragraph 7.21 states:

“Overall the assessments of existing sites indicate that across the 77 Core HMA sites assessed, there is a strong supply of employment sites that vary in their scale and provision of facilities to satisfy their occupiers’ needs: from City Centre sites, to traditional industrial estates, modern office accommodation and rural sites for niche (generally indigenous) uses. The majority of the sites assessed accommodated a mix of office, light industry, B2 and B8 uses.”

8.4 The Councils agree with this finding. A list of employment sites making up the identified employment space supply within the Plan area is set out in **Appendix 1** of this Employment Background Paper. In general the quantity and quality of employment sites is considered sufficient to meet overall needs.

8.5 The preferred approach identifies the following strategic sites which include major employment provision:

- Toton and Chetwynd Barracks;
- Ratcliffe on Soar Power Station (79 ha within the plan period); and
- Employment Allocations within existing strategic sites.

8.6 The sites at Toton and Chetwynd Barracks have potential to generate significant growth providing jobs across all skill levels for both local people and new residents. The Ratcliffe on Soar site represents a major regeneration and redevelopment opportunity located within the Freeport for a range of employment uses including advanced manufacturing, logistics, and research and training facilities. Other sites with significant employment space available include existing strategic sites at Top Wighay Farm north of Nottingham and Teal Close to its east.

Conclusions on qualitative sites considerations

8.7 The Councils consider that the existing and future supply of existing strategic sites provides an appropriate range, size, type and location to meet general needs for industrial, warehousing and office business space needs.

Strategic Distribution/Logistics sites

9.1 The ELS Study recommends at paragraph 9.32 that:

Given the scale and urgency of this issue, the District Councils (potentially working with adjoining districts along the M1 Corridor) may wish to consider commissioning a further strategic study to quantify the scale of strategic B8 logistics need across the Core/Outer HMA and beyond that builds on the indicative suggestions set out above. This future study should seek to quantify the scale of strategic B8 requirements and potentially identify sites where this need should be allocated. Our view would be that the main focus of this future study should be along the M1 Corridor and A-roads near to the Motorway junctions.

9.2 The Councils commissioned ICENI to undertake a logistics study – Nottinghamshire Core and Outer HMA Logistics Study – to assess the specific needs for strategic distribution or logistics facilities across the Nottingham Core and Outer HMA focussing on the area around EMA, strategic routes to the EMA and along the M1 corridor. The study is available here:

https://www.gnplan.org.uk/evidence-base/

9.3 The consultants reported in August 2022 and recommend that the requirement for planning policy purposes should be 1,486,000 sq. m or 425 hectares of logistics space. Taking into account unimplemented permissions and allocations the residual need is 1,171,000 sq. m or 335 hectares. The study notes the position allowing for potential pipeline in the form of draft local plan allocations (Ashfield and Erewash) as well as the proposals at the Freeport in Rushcliffe Borough which would reduce the need to 601,000 sq. m or 172 hectares subject to the allocations being confirmed. The consultants conclude that the residual need would fall to the order of one or more realistically two large strategic logistics parks subject to the final status of the emerging allocations and the Freeport. It is important to stress that the study does not consider planning policy constraints such as Green Belt as it is essentially a technical assessment of need and these policy constraints will be factored into potential site selection by the Councils.

9.4 The consultants recommend that the following areas of opportunity be considered:

- Area adjacent to M1 Junction 28 and 27 (Sutton in Ashfield, Alfreton, Kirkby in Ashfield and towards Hucknall);
- Area adjacent to M1 Junction 26 (Langley Mill, Eastwood and Kimberley);
- Area adjacent to M1 Junction 25;

- Area adjacent to A453; and
- Area surrounding Newark (along A1 and A46).

9.5 A further recommendation is that potential logistics sites should be selected in the following sequential order:

- The extension of existing industrial / distribution sites. Site extensions should only be permitted where there is adequate road capacity serving the site and at adjacent motorway/dual carriageway junctions or capacity can be enhanced as part of any extension;
- Identifying suitable new strategic distribution sites on previously developed land which meet the site selection criteria; and
- Identifying suitable new strategic distribution sites on greenfield land which meet the site selection criteria.

9.6 The Greater Nottingham Councils are considering how to take forward the findings of the ICENI study. During the consultation on the Greater Nottingham Strategic Plan in July 2020 and February 2021, developers argued there was a need to provide for large scale distribution sites. However, no large sites were promoted specifically for large scale logistics/distribution facilities to be considered although some sites for general employment uses including distribution were promoted by various developers in the vicinity of Junction 26 and the A46. The Councils have invited developers to put forward suitable candidate sites for strategic logistics distribution sites through a “call for sites” as part of the preparation of the Greater Nottingham Strategic Plan.

Overall Conclusion

10.1 The Councils have commissioned independent and up to date evidence prepared by the expert consultants Lichfields and published the Nottingham Core and Outer HMA Employment Land Study 2021 available on the gnplan.org.uk website. This Employment Background Paper takes forward the recommendations set out in the ELS 2021 and adds further background detail.

10.2 The ELS 2021 has taken into account the likely impact of the COVID-19 pandemic as far as practical in its econometric modelling work. The aspirations and policy interventions set out in the D2N2 LEP Strategic Economic Plan have been built into the econometric modelling regeneration scenario set out in the ELS which is the preferred growth scenario chosen by the Councils. This regeneration scenario with the adjustments sets out in this Employment Background Paper is considered the most appropriate growth scenario.

10.3 The Nottinghamshire Core and Outer HMA Logistics Study makes recommendations for future provision and is summarised in this Employment Background Paper. The Councils have invited developers to submit candidate sites through a “call for sites” exercise.

Appendix 1: Supply of employment land and office floorspace making up the employment space supply for each Council

Broxtowe Borough Council

Employment land supply - manufacturing and warehousing

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Toton*	3.25 ha	Toton	n/a	3.25 ha	Mixed employment uses
Various		Various	n/a	2.63 ha	Industrial and warehousing
Total				**5.88 ha**	

* identified as a strategic site in the Preferred Approach

Employment supply office floorspace

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Toton*	1.25 ha	Toton	n/a	1.25 ha	Offices, including 'Innovation Campus' and 'high skilled jobs'
Total				**10,000 sq. m****	

* identified as a strategic site in the Preferred Approach

** Capacity is estimated at 10,000 sq. m at 80% plot ratio on 1.25 ha of land

Gedling Borough Council

Employment land supply: manufacturing and warehousing sites

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Top Wighay Farm*		Adjoins Hucknall	Good	5.2	Employment
Colwick Industrial Estate	Various sites including former Total site.	Within the main built up area of Nottingham	Average	5.23	Employment
Teal Close*		Adjoins the main built up area of Nottingham	Very Good	3.05	Employment
Gedling Colliery*	4.12 (gross)		Very Good	2.45 (net)	Mixed
Hillcrest Park	1		N/A	1	Employment
Total				**16.93**	

* identified as a strategic site in the Preferred Approach

Employment supply office floorspace sq. m

site	floorspace	Location	ELS Quality assessment	Land remaining	Suitable uses
Top Wighay Farm*		Adjoins Hucknall	Good	3412	Office
Colwick Industrial Estate		Adjoins main built up area of Nottingham	Average	3,449	Office
Total				**6,861**	

* identified as a strategic site in the Preferred Approach.

Nottingham City Council

Employment land supply manufacturing and warehousing sites

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Blenheim Lane (SR02)	7.05	Adjoins the main built up area of Nottingham	Good	2	Employment
Stanton Tip Hempshill Vale*	42.61	Adjoins the main built up area of Nottingham	Average/poor	5-10 Average = 7.5-	Mixed
Boots*	84.50	Adjoins the main built up area of Nottingham	Very Good	5-15 Average = 10	Mixed
Riverside	13.97	Adjoins the main built up area of Nottingham	Very Good		
Hucknall Road / Southglade Road - Southglade Food Park	0.85	Adjoins the main built up area of Nottingham	N/A	0.85	Employment
Radford Road - Former Basford Gasworks	3.81	Adjoins the main built up area of Nottingham	N/A	1-2 Average = 1	Radford Road - Former Basford Gasworks $
Total				**21.35**	

* identified as a strategic site in the Preferred Approach

Employment supply office floorspace

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Blenheim Lane (SR02)	7.05	Adjoins the main built up area of Nottingham	Good	4,800	Employment
Boots *	84.50	Adjoins the main built up area of Nottingham	Very Good	2,500 – 6,500 Average = 4,500	Mixed

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Thane Road - Horizon Factory	19.9	Adjoins the main built up area of Nottingham	Good	See Appendix 4 of Local Plan Part 2	Employment
Canal Quarter - Island Site	9.77	Adjoins the main built up area of Nottingham	Good	43,900 – 63,400 Average = 54,150	
Abbey Street/Leengate (SR40)	3.68	Adjoins the main built up area of Nottingham	N/A	5,000 – 8,000 Average = 6,500	office
NG2 West - Enterprise Way (SR41)	2.18	Adjoins the main built up area of Nottingham	Very Good	13,000 – 15,000 Average = 14,000	office
NG2 South - Queens Drive	1.62	Adjoins the main built up area of Nottingham	Very Good	10,000 – 12,000 Average = 11,000	office
University Boulevard - Nottingham Science and Technology Park (SR43)	1.89	Adjoins the main built up area of Nottingham	Very Good	6,673	office
Electric Avenue (SR44)	2.30	Adjoins the main built up area of Nottingham	Good	4,400	office
Royal Quarter - Burton Street, Guildhall, Police Station and Fire Station (SR53)	0.89	Adjoins the main built up area of Nottingham	Good	10,000 – 20,000 Average = 15,000	mixed
Creative Quarter - Bus Depot (SR56)	2.55	Adjoins the main built	Good	0 – 5,000 Average = 2,500	mixed

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
		up area of Nottingham			
Castle Quarter - People's College (SR57)	1.44	Adjoins the main built up area of Nottingham	N/A	5,500 – 10,000 Average = 7,750	mixed
Canal Quarter - Station Street/Carrington Street (SR60)	0.76	Adjoins the main built up area of Nottingham	Good	9,000	Mixed
Canal Quarter - Queens Road, East of Nottingham Station (SR61)	1.24	Adjoins the main built up area of Nottingham	Good	5,000 – 15,000 Average = 10,000	Mixed
Canal Quarter - Sheriffs Way, Sovereign House $ (SR62)	0.72	Adjoins the main built up area of Nottingham	Good	21,841	Mixed
Canal Quarter - Waterway Street (SR63)	1.07	Adjoins the main built up area of Nottingham	Good	0 – 9,100 Average = 4550	Mixed
Canal Quarter - Sheriffs Way/Arkwright Street (SR64)	1.31	Adjoins the main built up area of Nottingham	Good	7,000	Mixed
Canal Quarter - Arkwright Street East (SR65)	1.23	Adjoins the main built up area of Nottingham	Good	5,000 – 10,000 Average = 7,500	Mixed
Waterside - London Road, Former Hartwells (SR67)	1.64	Adjoins the main built up area of Nottingham	N/A	10,000 – 19,000 Average = 14,500	Mixed

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Waterside - London Road, Eastcroft Depot (SR68)	4.68	Adjoins the main built up area of Nottingham	N/A	1,000–6,000 Average = 3,500	Mixed
Waterside - Meadow Lane (SR71)	5.0	Adjoins the main built up area of Nottingham	N/A	0 – 3,000 Average = 1,500	Mixed
Waterside - Freeth Street (SR72)	8.45	Adjoins the main built up area of Nottingham	Average / poor	0 – 3,000 Average = 1,500	Mixed
Total				**234,664****	

* identified as a strategic site in the Preferred Approach

** Figure uses the average of the range where indicated and Includes 4,500 sq. m small scale development on allocated sites and 18,000 sq. m on non-allocated sites.

Rushcliffe Borough Council

Employment land supply: manufacturing and warehousing

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
Ratcliffe on Soar Power Station*	206.81 (Whole site area) 121.1 (Net)	Ratcliffe on Soar close to J24A and EMA	Good	79 pre 2038 42 post 2038 as less than certain	North suitable for research & development uses South suitable for science park and advanced manufacturing uses, Freeport proposal
RAF Newton*	10.67	Freestanding	Average	10.6	Mixed
Land North of Bingham*	14.16	Bingham	Good	14.2	Mixed
East of Gamston*	9	Adjoins the main built up area of Nottingham	Good	9	Mixed
South of Clifton*	15	Adjoins the main built up area of Nottingham	Good	15	Mixed
Chapel Lane West		Bingham	N/A	0.5	Mixed
Former Bunny Brickworks		Bunny	N/A	3	Mixed
Hollygate Lane		Cotgrave	N/A	3.4	Mixed
Former Cotgrave Colliery		Cotgrave	N/A	2	Mixed
South East of Platt Lane		Keyworth	N/A	2.7	Mixed
Hardstaffs		Freestanding	N/A	3.6	Mixed
Nottingham Road		Radcliffe on Trent	N/A	3	Mixed
Wood Farm Court, Church Lane		Thrumpton	N/A	0.4	Mixed
Total				**135.5**	

* identified as a strategic site in the Preferred options

Employment supply office floorspace

site	Area	Location	ELS Quality assessment	Land remaining	Suitable uses
East of Gamston*	3	Adjoins the main built up area of Nottingham	Good	12,000**	Office
RAF Newton*	2	Freestanding	Average	8,000	Office
Land South of Clifton*	5	Adjoins the main built up area of Nottingham	Good	20,000	Office
Chapel Lane East		Bingham	N/A	1175	Office
Hardstaffs		Freestanding	N/A	750	Office
Barrington House Leake Road		Costock	N/A	655	
Wellbeing Clinic Ltd		West Bridgford	N/A	200	
Total				**42,780**	

* identified as a strategic site in the Preferred Approach

** Some office could be available beyond the plan period.