

**NUNEATON & BEDWORTH
BOROUGH EMPLOYMENT LAND
REVIEW – FINAL REPORT**

Nuneaton & Bedworth Borough
Council

April 2010

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EXECUTIVE SUMMARY

- ES1. This report reflects research and analysis undertaken by GVA Grimley and GHK Consulting regarding the requirements for, and capacity of, employment land in Nuneaton and Bedworth Borough.
- ES2. It provides a full baseline review of key social and economic indicators, summarises relevant planning and economic policies and strategies at the national, regional and local levels and gives commentary on the commercial property market in the Borough. We provide a quantitative and qualitative review of existing and proposed employment land within the Borough and make recommendations for a new portfolio of land moving forward. The supply is compared with forecasts of employment land demand under a range of scenarios, and a gap analysis is undertaken identifying the quantum of land required to be identified up to 2026. Potential future directions of growth to accommodate the required employment land are identified.
- ES3. The report also considers the impact of locating a Regional Investment Site (RIS) in Nuneaton and Bedworth as well as identifying potential locations where such a site could be accommodated within the Borough. Finally, the report makes recommendations for a preferred scenario, a programme of monitoring and review and how the local authority can assist in enabling the delivery of employment land, with a focus on viability and funding interventions.

Baseline Review

- ES4. The key themes arising from the baseline review within the Borough were as follows:
- At the regional level of planning policy, the West Midlands RSS Panel Report identifies a requirement for a short term (five year) reservoir of 32ha and a longer term requirement (to 2026) of 128ha for the Borough. In addition, as a minimum, the indicative requirement for a 10 year period should be identified in order that land or premises will always be available to top up the reservoir as it is used. A requirement is identified for 11,000 new dwellings in Nuneaton and Bedworth during the period 2006 to 2026. Finally the Panel Report identifies that there is a requirement for a Regional Investment Site (RIS) within the Coventry and Nuneaton Regeneration Zone (CNRZ);

- The Warwickshire Structure Plan set out a requirement to provide land for industrial development. It states that the Local Plan must make provision for 132 ha of land for industrial development between 1996 and 2011. Of this, 87 ha were in the pipeline at the time the Local Plan was published, leaving 45 ha to be allocated. Subsequent annual monitoring reports have highlighted that the Local Plan identifies enough employment land to meet the Structure Plan requirement;
- The review of social and economic conditions identifies that population growth within the Borough is expected to be at broadly the same rate as in the West Midlands (at 13.7%), which is below that of the UK. The level of skills attained by the resident population is relatively poor with just 20.5% achieving NVQ4 and above which is lower than the regional and national average. Furthermore, it was identified that Nuneaton and Bedworth is a relatively disadvantaged area according to the Index of Multiple Deprivation rankings. In terms of employment there is a heavy reliance on industrial markets within Nuneaton and Bedworth with a large proportion of the resident population employed in elementary and trade occupations. The current pattern of commuting shows that almost half of residents in the Borough travel outside Nuneaton and Bedworth to their place of work.
- The property market review identifies key locations, market conditions and development land markets for both office and industrial sectors. The key locations for industrial / distribution operations within the Borough are Gallagher Business Park, Prologis Park, Grovelands Industrial Estate, Bayton Road Industrial Estate, Bermuda Business Park, Caldwell Road Industrial Estate, Attleborough Fields Industrial Estate and Hemdale Business Park. Prime rental values are in the order of £5.00 per sq ft (psf), with secondary accommodation valued at £2.00 to £4.00 psf. In terms of office accommodation, the key locations in the Borough are Eliot Business Park, Nuneaton Town Centre and Bedworth Town Centre. Rental values range from £5.00 to £6.00 psf for lowest quality stock to £14.00 to £15.00 psf for new build office accommodation.

Review of Employment Land Supply

ES5. In total, around 290ha of existing employment land was identified within the Borough. The stock was assessed in terms of its physical, market and sustainability characteristics and it was demonstrated that, in general, the Borough has a supply of employment land that is of average to good quality. Recommendations were made to remove some existing areas of employment land from the supply portfolio, as it was identified that these would not be of sufficient quality to serve the economic needs of the Borough over the next 20 years. This reduced the existing supply of employment land moving forward to around 273ha.

ES6. The identified supply of proposed employment land totalled around 45ha. This was assessed in terms its physical, market and sustainability characteristics and it was demonstrated that, in general, the Borough has a supply of employment land that is of good quality. Recommendations were made to remove some proposed areas of employment land from the supply portfolio, as it was identified that these sites had been allocated for some time (around 15 years or more) without being developed, therefore the likelihood of them coming forward over the Plan period was more limited. This reduced the proposed supply of employment land moving forward to around 38ha. An assessment of the capacity of the proposed supply of employment sites was undertaken, having regard to their development potential for B1 (offices), B2 (general industrial) and B8 (distribution) uses, which is shown in Table ES 1 below.

Table ES 1 - Summary of Capacity Assessment

Typology	No. of Sites	Capacity (ha)			Total
		B1	B2	B8	
B1	4	4.66	0.00	0.00	4.66
B1/B2	0	0.00	0.00	0.00	0.00
B1/B2/B8	4	6.15	6.15	6.15	18.46
B2	7	0.00	1.49	0.00	1.49
B2/B8	12	0.00	7.13	7.13	14.26
B8	0	0.00	0.00	0.00	0.00
Total	27	10.81	14.77	13.28	38.87

Source: GVA Grimley, 2010

Economic Projections and Scenarios

ES7. In assessing the demand for employment land in the Borough up to 2026, a number of economic projections and scenarios were developed, taking into account a variety of factors including local authority aspirations for a reduction in out-commuting, housing projections outlined in the WMRSS and an assessment of economic growth within the Borough over the past 10 years.

ES8. Forecasts of employment (numbers of jobs) were converted to forecasts of employment land requirements across a range of land uses, which showed that the total demand for employment land within the Borough up to 2026 is likely to be between 57.48ha to 144ha, shown in Table ES 2 below.

Table ES 2 - Summary of Employment Land Requirements (2007 – 2026)

Scenario	Employment Land Demand 2007 to 2026 (ha)			
	B1a / B1b	B1c / B2	B8	Total
Baseline	9.48	26.34	21.66	57.48
RSS Scenario – 11,000 New Homes	23.48	26.34	25.26	75.07
RSS Scenario – 14,500 New Homes	26.65	26.34	26.36	79.35
Past Trends	17.42	26.34	33.28	77.04
Reduced Out-Commuting	43.54	44.76	55.69	144.00

Source, GVA Grimley analysis, 2010

Comparison of Demand & Supply

ES9. The comparison of the demand for and supply of employment land in the Borough identified a gap of between 18.61ha to 105.13ha, dependent on the scenario and shown in Table ES 3 below. This took into account a variety of factors including an allowance for completions and the revised portfolio of employment land.

Table ES 3 – Comparison of Employment Land Demand and Supply within Nuneaton and Bedworth

Demand (2007 – 2026)	Scenario	Offices	Factories	Warehouses	Total
	Baseline	9.48	26.34	21.66	57.48
	RSS Scenario - 11,000 New Homes	23.48	26.34	25.26	75.07
	RSS Scenario - 14,500 New Homes	26.65	26.34	26.36	79.35
	Past Trends	17.42	26.34	33.28	77.04
	Reduced Out-Commuting	43.54	44.76	55.69	144.00
	Supply	10.81	14.77	13.28	38.87
Difference between Supply & Demand	Baseline	1.33	-11.56	-8.38	-18.61
	RSS Scenario - 11,000 New Homes	-12.66	-11.56	-11.97	-36.20
	RSS Scenario - 14,500 New Homes	-15.84	-11.56	-13.08	-40.48
	Past Trends	-6.61	-11.56	-20.00	-38.17
	Reduced Out-Commuting	-32.73	-29.99	-42.41	-105.13

Source: GVA Grimley, 2010

Impact of a Regional Investment Site within Nuneaton and Bedworth

ES10. The report considers the impact of locating a RIS within Nuneaton and Bedworth by firstly examining the numbers of jobs created, transportation requirements (public and private), economic effects and demand from the property market. Secondly, the report identifies potential locations for a RIS within the Borough, highlighting three broad locations which would be suitable to accommodate such a site. These are Judkins Quarry, to the north west of Nuneaton Town Centre, Bermuda / Griff on the A444 and at Junction 3 of the M6 motorway. Potential sites within these broad locations are identified and assessed in terms of their suitability. The report recommends that the local authority seeks to develop a RIS at either Junction 3 of the M6 or in the Bermuda / Griff area.

Future Direction of Employment Land Growth

ES11. The report has considered future directions of employment land growth in the Borough having regard to emerging planning policy (Nuneaton and Bedworth Core Strategy), site suitability and market attractiveness. In assessing the sites and their ability to deliver economic growth we have considered the following characteristics, which we feel are important when proposing new allocations of employment land - location, strategic access, sustainability, profile, environment, deliverability and attractiveness.

ES12. The report identifies seven broad areas for future employment land growth (although not specific sites at this stage). These are North of Nuneaton, Attleborough, Bermuda Extension, Bermuda / Griff, West of Bedworth, M6 Junction 3 and South of M6. We have ranked these locations based on their ability to meet the key criteria outlined above. These rankings are shown in Table ES 4 below.

Table ES 4 – Ranking of Broad Future Employment Areas

	Location	Strategic Access	Sustainability	Profile and Accessibility	Environment	Deliverability	Attractiveness
North of Nuneaton	6	5	5	5	6	5	6
Attleborough	5	7	1	6	3	4	=4
Bermuda / Griff	4	4	3	4	5	6	=4
Bermuda Extension	3	3	4	3	1	3	=2
West of Bedworth	7	6	2	7	7	7	7
M6 Junction 3	1	1	6	1	4	1	1
South of M6	2	2	7	2	2	2	=2

Source: GVA Grimley analysis, 2010

Conclusions

- ES13. The report provides a number of conclusions to the Study. The RSS scenario based on 11,000 new homes is recommended as a preferred scenario, as it reflects the Panel Report of the WMRSS and is therefore in line with emerging regional policy, which is due to be adopted later this year. The deficit in terms of employment land allocations under this scenario is around 36ha.
- ES14. We provide advice on the monitoring and review of the employment land portfolio, recommending that it be reviewed and updated at least once every five years, with annual monitoring undertaken to ensure that the five year supply is kept as up to date as possible.
- ES15. With regard to delivery, the report makes recommendations for a Delivery Strategy to be developed, which will clearly show where development will happen and those responsible for making it happen. In addition a number of mechanisms are highlighted to assist in the delivery of employment land, which include enabling land assembly through use of CPO powers and negotiation, designations for mixed use development to include phasing obligations to bring employment land forward as a priority and utilising existing stock in a more intensive and effective manner. Finally the report identifies a number of funding streams that can assist with enabling employment land development, including Section 106 contributions and the Community Infrastructure Levy (CIL), Local Asset Backed Vehicles (LABVs) and Joint Ventures.

1. INTRODUCTION AND APPROACH

- 1.1 This report sets out the processes and findings of the Nuneaton and Bedworth Borough Employment Land Review (ELR). It has been produced taking into consideration ODPM (as was) Guidance on conducting employment land reviews (Employment Land Reviews – Guidance Note 2004) and has been undertaken by GVA Grimley and GHK Consulting.

Brief

- 1.2 The Client, Nuneaton and Bedworth Borough Council, issued a brief on 27th February 2009 concerning the future employment land requirements within the Borough Council's administrative area in the period 2006 - 2026.

- 1.3 The main requirements of the Brief were to:

- Build upon the work undertaken in the Sub Regional Employment Land Review for Coventry, Solihull and Warwickshire (June 2007);
- Undertake a quantitative assessment of future employment land requirements within Nuneaton and Bedworth from 2006 – 2026, taking into account new growth proposed within Draft Policy PA6A of the emerging West Midlands Regional Spatial Strategy and the potential housing growth set out in the GOWM response;
- Provide qualitative and quantitative assessments of existing and committed employment areas;
- Compare employment land supply with total future demand to identify any “gaps” in provision;
- Provide guidance on a new portfolio of employment sites;
- Investigate the potential impact of a Regional Investment Site (RIS) being located in Nuneaton and Bedworth Borough Council;
- Provide guidance on future locations of employment land in the Borough;
- Produce an intervention strategy to promote strategic site allocations; and
- Suggest a robust methodology for a monitoring regime for future take up and assessment of employment land provision including indicative timing requirements across five yearly intervals to 2026.

RSS and its Relationship to this work

- 1.4 The West Midlands Regional Spatial Strategy (WMRSS) provides a long term land use and transport planning framework for the Region and guides the preparation of local authority development plans and local transport plans. The RSS is currently undergoing a revision and the consultation period for the Phase Two Revision (housing and employment) closed in December 2008. The RSS sets out requirements for the provision of employment land for each local authority in the Region. Within Nuneaton and Bedworth, there is a requirement to provide a rolling supply of 32 hectares (ha) of readily available employment land and a longer term requirement of 96ha over the plan period, subject to testing and possible revision as part of the Core Strategy. The RSS also identifies that any cross boundary issues will need to be resolved in terms of employment land supply. In the case of Nuneaton and Bedworth it is unlikely that there will be sufficient land within Coventry to meet employment land requirements over the Plan period, and that Nuneaton and Bedworth may have to accommodate some of these requirements.
- 1.5 The outputs from this study will provide evidence in relation to the future employment land needs of Nuneaton and Bedworth to 2026 in response to the employment land requirements as detailed in the RSS. It also provides an evidence base for the recommendation of a new employment land portfolio, including identifying those employment sites that will need to be protected from alternative forms of development in order that Nuneaton and Bedworth's economic aims can be accomplished.

Report Structure

- 1.6 The remainder of the report is structured as follows:
- **Section 2** - Baseline Review;
 - **Section 3** - Property Market Analysis;
 - **Section 4** - Review of Employment Land Supply;
 - **Section 5** - Economic Projections and Scenarios;
 - **Section 6** - Forecasts of Future Employment Land Demand;
 - **Section 7** - Comparison of Demand & Supply;
 - **Section 8** - Impact of a Regional Investment Site within Nuneaton and Bedworth;
 - **Section 9** - Future Direction of Employment Land Growth; and

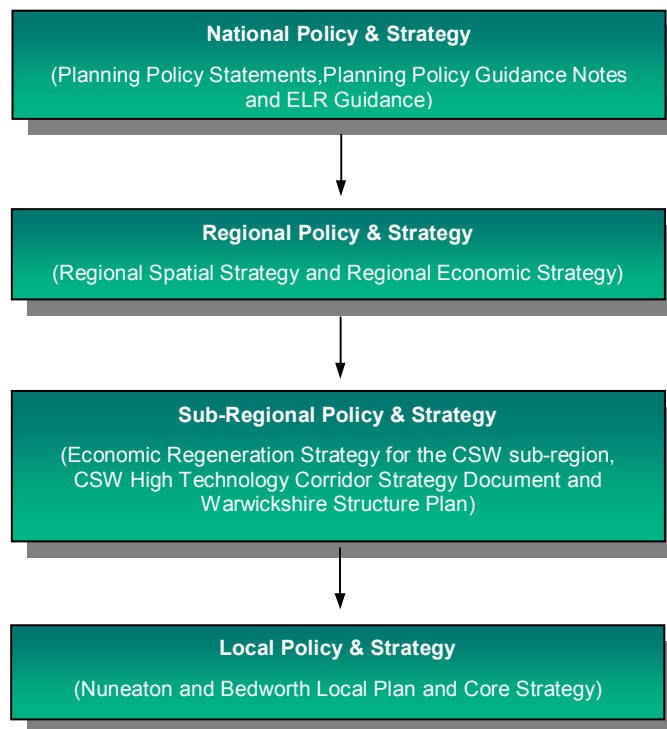
- **Section 10 - Conclusions.**

2. BASELINE REVIEW

Background Document Review

2.1 In this part of the baseline review we highlight the key themes and recommendations coming from a number of key policy documents at the national, regional, sub-regional and local levels that are of particular relevance to this study, highlighted in Figure 2.1 below. This work has accentuated our appreciation of the key issues affecting the economic growth of Nuneaton and Bedworth Borough in the context of the West Midlands and the Coventry, Solihull and Warwickshire (CSW) sub-region.

Figure 2.1 - Structure of Planning and Economic Policies Affecting the Nuneaton and Bedworth ELR



Source: GVA Grimley, 2010

National Policy and Strategy

2.2 National planning policy comprises a series of Planning Policy Guidance Notes (PPGs) and Planning Policy Statements (PPSs). These provide material considerations in the production

of Local Development Frameworks and in the determination of planning applications. Policies of particular relevance to employment land within Nuneaton and Bedworth are as follows:

Planning Policy Statement 1: Delivering Sustainable Development (2005)

- 2.3 PPS1 sets out the Government's overarching planning policies on the delivery of sustainable development. It requires local planning authorities to facilitate and promote sustainable and inclusive patterns of urban development by contributing to sustainable economic development, protecting the natural environment and ensuring high quality development through good design and the efficient use of land. It also seeks to ensure that development supports existing communities and contributes to the creation of safe, sustainable, liveable and mixed communities with access to good housing, jobs and key services for all members of the community.

Planning Policy Statement: Planning and Climate Change - Supplement to Planning Policy Statement 1 (2007)

- 2.4 This PPS on climate change supplements PPS1 by setting out how planning should contribute to reducing emissions and stabilising climate change, taking into account the unavoidable consequences. Patterns of urban growth should be delivered which provide a mix of residential, retail and employment opportunities and promote public transport to cut reliance on private transport and thus cut carbon emissions. Development plan documents should encourage energy supply for new development to be renewable or low carbon.

Planning Policy Statement 3: Housing

- 2.5 PPS 3, the replacement for PPG 3, was produced in November 2006. The draft PPS 3 for consultation, produced in December 2005, continues to seek to ensure that a wide choice of housing types is available to meet the needs of the community, to widen opportunities for home ownership, ensure high-quality housing for those who cannot afford market housing, improve affordability, and create sustainable, inclusive and mixed communities.
- 2.6 The priority for where housing development should take place will continue to be previously-developed land, particularly where this is vacant or derelict. As part of determining the appropriate location of housing, and an overall approach to previously-developed land, local authorities should consider whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development.

PPS4: Planning for Sustainable Economic Growth

2.7 The aim of the new PPS4 is to create a coherent, modern set of policies to meet the challenges that the country faces now and over the longer term. It sets out a comprehensive policy framework for planning for sustainable economic growth in urban and rural areas, particularly town centres. Some of the key policy themes emerging from the new PPS4 include regions \ local authorities developing robust economic evidence bases, identifying suitable locations for development, encouraging mixed-use development with a strong emphasis on regeneration, high quality and sustainable environment – recognising the importance of good design for sustainable economic development and securing low carbon emissions and development management – local authorities adopting positive approaches to proposals, using robust evidence to weigh up the costs and benefits of development.

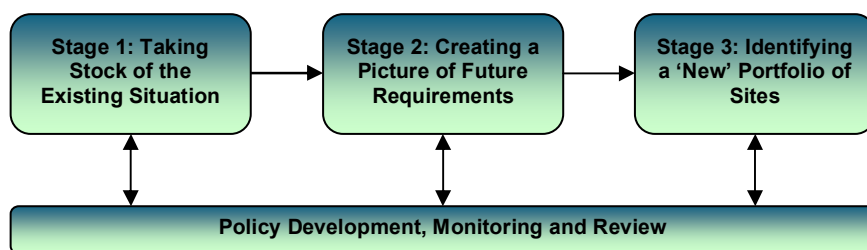
PPG13: Transport

2.8 PPG13 recognises the key role planning has in delivering the Governments integrated transport strategy by shaping the pattern of development and influencing the location, scale, density, design and mix of land uses. New development should help reduce the need to travel, reduce the length of journeys and make it safer and easier for people to access jobs, shopping, leisure facilities and services by public transport, walking, and cycling. The policies of PPG13 aim to reduce some of the need for car journeys (by reducing the physical separation of key land uses) and enable people to make sustainable transport choices.

Employment Land Review Guidance

2.9 The Employment Land Review Guidance, published by the Office of the Deputy Prime minister (as was) in 2004, proposes a three-part methodology for undertaking employment land reviews. These three stages are set out in Figure 2.2 below:

Figure 2.2 – Three Stage Process for Employment Land Reviews



Source: CLG Guidance Note on ELRs, December 2004

-
- 2.10 The main objective of Stage 1 is a simple assessment of the ‘fitness for purpose’ of the existing employment land portfolio, principally in order to identify the ‘best’ employment sites to be retained and protected and identifying sites that should clearly be released for other uses. The principal outcome of Stage 1 is the identification and protection of the ‘best’ employment sites and the identification and potential release of those existing or allocated employment sites which clearly do not meet sustainable development criteria, and are unlikely to meet future market requirements.
- 2.11 The main objective of the Stage 2 analysis is to quantify the amount of employment land required across the main business sectors within the study area during the plan period. This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. The outcomes of Stage 2 are a quantitative assessment of future employment land requirements for the plan period. First, there is a need to undertake a quantitative assessment of the total future demand for employment land across the main sectors. The second element is to undertake a quantitative assessment of suitable employment land stock or supply remaining from Stage 1. The two outcomes will need to be compared to identify gaps in provision and any areas of over or under-supply.
- 2.12 The objective of Stage 3 is to undertake a review of the existing portfolio of employment sites, against defined site assessment criteria, in order to identify those sites which should be retained and protected and those which should be released for other uses. Where there are identified gaps in provision, a site search will be required where potential new sites are subjected to rigorous assessment in order to create a ‘balanced’ portfolio. The outcome is a portfolio of sites that will meet local and strategic planning objectives while serving the requirements of businesses and developers.

Regional Policy and Strategy

West Midlands Regional Spatial Strategy – Background and Timetable for Revision

- 2.13 The West Midlands Regional Spatial Strategy (WMRSS) was adopted in January 2008. It sets out a vision for the region until 2021, seeking to promote economic growth and sustainable development within the region.
- 2.14 Since adoption, a review of the WMRSS has been undertaken in three phases, as follows:
- Phase 1: Incorporating Black Country policies into the WMRSS. First stage revision published January 2008;

-
- Phase 2: Includes housing and employment issues. Development of the Preferred Option took place up to March 2007 and consultation took place between January 2008 - December 2008. The Examination in Public (EiP) took place between April – June 2009 and the EiP Panel Report was published on 28th September 2009 (see para 2.19 for further information); and
 - Phase 3: Includes environmental issues. Preferred options consultation took place between 29th June - 14th August 2009 and development of Policy Statements and Policy Recommendations will be undertaken from November 2009 - March 2010.
- 2.15 The Phase Two Revision of the WMRSS is most relevant to this Employment Land Review, and a number of the key policies are set out below.

WMRSS Phase Two Revision – Key Policies

- **Policy CF3, Level and Distribution of New Housing Development** – identifies that development plans should make provision for additional dwellings (net) for the period 2006 – 2026.
- **Policy UR3, Enhancing the Role of City, Town and District Centres** – City, Town and District Centres, in particular those identified in Policy PA11, such as Nuneaton, should play a leading role in urban renaissance programmes. This should include driving the economy forward by providing services for local communities and a sense of identity;
- **Policy PA2, Urban Regeneration Zones** – Identifies five Regeneration Zones, including one at Coventry and Nuneaton. The purpose of these zones is to encourage urban renaissance and to boost economic activity within the area;
- **Policy PA3, High Technology Corridors** – The RSS identifies three High Technology Corridors including one at Coventry, Solihull and Warwickshire (CSW). New development should be focused within the Corridor at specific nodes, including Nuneaton;
- **Policy PA6, Portfolio of Employment Land** – Local Authorities should provide a range and choice of readily available employment sites. Regionally significant sites should include Regional Investment Sites (RIS), Major Investment Sites (MIS) and Regional Logistics Sites (RLS). Locally significant sites should include sub-regional employment sites, good quality employment sites and other employment sites;
- **Policy PA7, Regional Investment Sites** – Provision should be made for a series of Regional Investment Sites (RIS) to support the diversification and modernisation of the Region's economy. When identifying RIS the existing needs of the High Technology Corridor should be taken into account. At least one RIS should be made available within

or linked by public transport to the High Technology Corridor (i.e. Blythe Valley Park in CSW); and

- **Policy PA11, The Network of Town and City Centres** – 25 Strategic Towns and Cities have been identified, including Nuneaton. These towns and centres will be the focus for major retail developments (those exceeding 10,000 sq m gross floorspace), large scale leisure and office developments (those exceeding 5,000 sq m gross floorspace) and cultural, tourist, social and community uses which attract a large number of visitors.
- 2.16 Policy CF3 identifies the levels and distribution of new housing development within the West Midlands. For Nuneaton and Bedworth the level of new (net) housing was set at 10,800 new homes between 2006 – 2026. This is equivalent to 540 new homes per annum.
- 2.17 Policy PA6A sets out a requirement for Local Authorities to make provision for a five year rolling supply of employment land outside of town centres. It also outlines a further requirement for likely longer term land requirements. At the time that the Preferred Option was developed the five year rolling supply for Nuneaton and Bedworth was set at 32ha, with a longer term indicative requirement to 2026 of 96ha. In terms of housing, Policy CF3 identified a requirement for an additional 10,800 new homes within the Borough over the Plan period.
- 2.18 Policy PA11 identifies Nuneaton as a Strategic Town Centre and a centre for economic development. The CSW High Technology Corridor will also be a focus for economic development and a possible location for future Regional Investment Sites.

WMRSS Phase Two Revision – Examination in Public and Panel Report

- 2.19 The Examination in Public (EiP) for the WMRSS Phase Two Preferred Option took place between April – June 2009 and adoption is anticipated in Spring 2010. The Panel Report to the EiP was published on September 28th 2009 and set out a number of revisions that affect the supply of housing and employment land in Nuneaton and Bedworth.
- 2.20 In respect of Policy CF3 a revised requirement was identified of 11,000 new dwellings in Nuneaton and Bedworth (200 more than was identified in the Preferred Option) during the period 2006 to 2026. This equates to an annual average of 550 dwellings.
- 2.21 Having regard to Policy PA6A (Employment Land Provision), the Panel Report identifies that the longer term requirements, over a period of 20 years, were based on 3x the five year rolling supply, logically equivalent to only 15 years supply. The Panel felt that such a calculation was illogical and therefore recommended that the long term requirements were based on 4x the five year rolling supply. There were no recommended changes to the five year rolling supply

for Nuneaton and Bedworth, hence the Panel Report identified a short term (five year) reservoir of 32ha and a longer term requirement of 128ha for the Borough. In addition the Panel Report recommends that, as a minimum, the indicative requirement for a 10 year period should be identified in order that land or premises will always be available to top up the reservoir as it is used.

- 2.22 In respect of Policy PA7, the Panel Report identified that evidence from the supporting Employment Land Background Paper to the WMRSS indicated that there was a requirement for a RIS within the Coventry and Nuneaton Regeneration Zone (CNRZ) and therefore recommended that the Policy was re-worded to specifically include a RIS to meet the needs of the CNRZ.
- 2.23 These proposed changes to the WMRSS are likely to be taken forward by the Government Office for the West Midlands (GOWM) in July 2010 for a period of consultation with a view to being adopted in Autumn 2010.

West Midlands Regional Economic Strategy

- 2.24 The West Midlands Regional Economic Strategy (WMRES), published in December 2007, sets out an ambitious vision for the region: "To be a global centre where people and businesses choose to connect". This means becoming more prosperous, more cosmopolitan, more inclusive and more sustainable.
- 2.25 The strategy builds on four pillars: business, place, people and a powerful voice:
- **Business** - Aims to seize market opportunities, improve competitiveness and harness knowledge on the business strand;
 - **Place** - Identifies the substantial land base of under-utilised industrial land within the Region which offers great scope and potential for supporting further economic growth;
 - **People** - Aims to create sustainable living, raise ambitions and aspirations and achieve full potential and opportunities for all; and
 - **Powerful Voice** – Identifies the need for a strong voice and evidence base to attract increased investment and stimulate greater levels of ambition within the region.
- 2.26 Together, these strands need a strong voice and a compelling evidence base so that the region can attract increased investment, stimulate greater levels of ambition and animate support for its economic vision.

2.27 Six Regeneration Zones were created in 2001/02, in order to target the region’s regeneration resources on the areas of greatest need and improve the coordination and impact of regeneration. Coventry and Nuneaton has been identified as a Regeneration Zone, and the Delivery Framework recognises the importance of maximising the employment and enterprise opportunities created by the proximity of this Regeneration Zone.

Sub-Regional Policy and Strategy

CSW Sub-regional Economic Strategy (December 2009)

2.28 This Strategy, produced by the Coventry, Solihull and Warwickshire Partnership (CSWP), sets out a 15 year economic vision and strategy for the sub-region. The location of Nuneaton and Bedworth Borough within the CSW sub-region is highlighted in Figure 2.3 below.

Figure 2.3 – The CSW Sub-Region



Source: CSWP, 2008

2.29 The Strategy identifies that the sub-region is marked by contrasts, with GVA per head in some areas, such as Solihull, among the highest in the country, whilst areas in the north of the sub-

region (including Nuneaton and Bedworth) and North Solihull have higher than average levels of worklessness.

- 2.30 The Strategy builds upon the four pillars concept identified in the WMRES, focussing delivery around three of the pillars: people, places and businesses. Cross cutting across these pillars are five principal themes, namely:
- Principle 1 – Provide access to economic opportunities;
 - Principle 2 – Develop a sustainable and resilient economy;
 - Principle 3 – Grow aspirations;
 - Principle 4 – Enable self developing communities; and
 - Principle 5 – Connect the sub-region.
- 2.31 For each of the cross-cutting principles, the strategy identifies a “roadmap”, detailing indicative milestones between the present day and 2026 and also sets out a spatial strategy, aligned with the spatial principles of the WMRSS, which identifies settlements of significant development (which includes Nuneaton and Bedworth town centres) as being one of the locations where economic development should be focussed.

Coventry, Solihull & Warwickshire Employment Land Review

- 2.32 The CSW Sub-Region Employment Land Review was published by DTZ in June 2007 and reviewed the supply of, and demand for, employment land and premises across the sub-region. It provided a basis for identifying / specifying the amount of employment land to be provided in Coventry, Solihull and Warwickshire at a sub-regional level. The outputs from the study were used to inform the partial review of the RSS. The study was produced in accordance with the government’s guidance on Employment Land Reviews (ELR). As a comparison, data on Coventry, as well as Nuneaton and Bedworth, has been included due to the spatial proximity of the two authorities.

Employment Forecasts

- 2.33 The study constructed baseline, medium growth and high growth scenarios to demonstrate the potential number of jobs that could be created within the sub-region between 2006 and 2026. Based on the Demand Forecasting model, the CSW sub-region could generate between 44,000 and 63,500 jobs by 2026, as indicated in Table 2.1 below.

Table 2.1 – Projected Employment Growth within the Study Area

	Baseline Scenario	Medium Growth Scenario	High Growth Scenario
Nuneaton & Bedworth	2,900	3,600	4,300
Coventry	12,600	14,900	17,500
CSW Total	44,000	53,700	63,500

Source: CSW Employment Land Review, DTZ, 2007

Alternative Scenario

- 2.34 The population will inevitably increase and based on future population change there will be an increase of 27,100 in the labour force by 2026. Housing growth within the sub-region could also create an additional 15,000 – 20,200 people in employment. When adding the total additional employment figure to this, the total labour supply increase would be 42,100 – 47,300 between 2006 and 2026. The lower end of this range is in line with the baseline scenario of 44,000 based on demand forecasting, but there is still a large shortfall between the upper end of this range and the high growth scenario figure of 63,500.
- 2.35 Interestingly, the study adopted the high growth scenario in its conclusions as it best reflects the strengths of Coventry, Solihull and Warwickshire and its ability to outperform the West Midlands region as a whole in terms of attracting employment related investment.

Employment Land Requirements

- 2.36 The study provided a detailed assessment of the employment land requirements with regards to each Use Class. Below in Table 2.2, is a summary of the employment land requirements (net additional) for Nuneaton and Bedworth, Coventry and the sub-region, against each of the forecasting techniques, over the period 2006-2026.
- 2.37 In the left-most columns of the table, the employment land requirements are shown for each land use class that have been derived using the Cambridge Econometrics (CE) data, based on the high growth employment scenario as detailed in Table 2.1. These figures indicate a total requirement of around 15.7 ha within Nuneaton and Bedworth.
- 2.38 The figures in the central part of the table are derived using trends of past take up of employment land. This method analyses take up of employment land over a set period of time and projects this rate forward over the period to 2026. For Nuneaton and Bedworth the Past Take-Up (PTU) method indicates a total requirement of around 154ha. The figures in the right-most columns provide the range of employment land requirements that can be derived from the two forecasting methods. On the basis of these figures, Nuneaton and Bedworth is forecast to have between 15.7 and 154 ha of employment land demand to 2026, whilst

Coventry has a demand for 50.4 – 266 ha. Coventry, Solihull and Warwick were expected to experience the highest levels of demand for office workspace.

Table 2.2 – Employment Land Requirements

	Forecasting Technique												
	Cambridge Econometrics					Past Take-Up				Figures rounded – CE & PTU			
	B1a	B1b/c, B2	B8	SG	Total	B1a	B1b/c, B2	B8	Total	B1a	B1b/c, B2	B8	SG
Nuneaton & Bedworth	2.2	0.4	8.9	4.2	15.7	38	38	78	154	2 - 38	0.4 - 38	9 - 78	4
Coventry	10.4	3.7	23.8	12.5	50.4	78	78	110	266	10 - 78	4 - 78	24 - 110	12.5
CSW Total	40.6	24.4	76.3	34.8	176.1	244	316	558	1,118	40 - 244	24 - 316	76 - 558	35

Source: CSW Employment Land Review, DTZ, 2007

N.B. Other districts have not been included in this summary table.

- 2.39 Whilst the figures presented in Table 2.2 above are considered to be robust, the fact that they provide a wide range of results means that they are not particularly helpful in assisting with development of employment land policies for inclusion in the emerging Nuneaton and Bedworth Core Strategy.

Employment Land Supply

- 2.40 A total of 22 sites (a mixture of proposed sites and existing premises) were assessed in Nuneaton and Bedworth and the key findings are summarised below:
- **Location and Accessibility** – The larger, more recent developments to the south of Nuneaton enjoy good accessibility to the M6, M69 and M42. However, the smaller sites on the outskirts of Nuneaton and Bedworth town centres suffer from local highway constraints but benefit from Nuneaton’s general accessibility to the motorway network. Bedworth has particularly good accessibility to the M6;
 - **Site Conditions** – Condition of sites varies throughout the Borough; the new distribution parks offer modern facilities in attractive locations, however many of the smaller industrial sites are in an ageing condition and contamination may be an issue;
 - **Availability** – Whilst there has been considerable development in recent years, a number of other allocated sites remain, which are constrained by a lack of infrastructure and demand. There is a reasonable supply of existing premises across the Borough, although much of this availability involves manufacturing space, which is difficult to let in a market suffering from a decline in traditional industry; and

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- **Developer Interest** – There has been considerable investment and development, primarily to the south of the Borough. It is now important to consider how to stimulate interest from developers that will help to diversify the economy.
- 2.41 The analysis showed that there were 46.1 ha of available land and 151,670 sq m of available premises. In addition, approximately 50% of employment sites and premises are classified as good / very good in terms of quality.
- 2.42 In comparison, there were 65.6 ha of available land and 133,432 sq m of available premises in Coventry and approximately 50% of employment sites and premises were classified as good / very good.

Conclusions

- 2.43 The main finding of the report was that there is enough land available in the entire sub-region to meet the needs to 2011, based on Cambridge Econometrics (CE) and Past Take Up (PTU) forecasts. Furthermore, under the CE forecast, there is also enough land to meet requirements up to 2016.
- 2.44 Nuneaton and Bedworth has an oversupply of employment land within the Borough to meet needs to 2011, whilst Coventry has sufficient land to meet forecasting requirements to 2011.

Local Policy and Strategy

Nuneaton and Bedworth Borough Local Plan (2006)

- 2.45 The Nuneaton and Bedworth District Local Plan was adopted 28th June 2006 for the period up to 2011, providing a framework for planning decisions. The main theme of the plan is 'Building Sustainable Communities'. It recognises the need for sustainable development and the need to ensure communities are well served by facilities.
- 2.46 The Warwickshire Structure Plan identifies a requirement for 5,600 dwellings to be built in the Borough up to 2011. 3,256 dwellings were provided between 1996 and 2003 and there were 1,749 outstanding allocations. An additional 595 dwellings are required to meet the requirement set out by the Structure Plan. The Local Plan Policy H1 identifies a number of sites which will meet the remaining Borough requirement.
- 2.47 The Warwickshire Structure Plan sets out a requirement to provide land for industrial development. It states that the Local Plan must make provision for 132 ha of land for industrial

development between 1996 and 2011. Of this, 87 ha were in the pipeline at the time the Local Plan was published, leaving 45 ha to be allocated.

2.48 The following policies set out in the Nuneaton and Bedworth Local Plan are particularly relevant to the future employment land development within Nuneaton and Bedworth. These include a number of saved policies from the current Local Plan:

- **Emp1, Employment Allocations** – Emp1 identifies a number of sites for employment land. The amount of employment land either in the pipeline, with permission, completed or under construction in Nuneaton and Bedworth at the time of the Local Plan publication was 87.74 ha. There was an additional 16 ha of land available without permission. This exceeds the Warwickshire Structure Plan target of 87 ha;
- **Emp2, Judkins** – 16ha of land at Judkins, Tuttle Hill are allocated for industrial purposes in accordance with a revised Development Brief to be produced as part of a Supplementary Planning Document (SPD);
- **Emp3, Redevelopment of Existing Sites or new Windfall Sites** – Industrial or commercial development on such sites will be permitted provided that a number of criteria can be met including the protection of nearby residential amenity, no adverse impact on highways and, in the case of a greenfield windfall site, it can be demonstrated that there are no suitable brownfield sites available;
- **Emp4, Colliery Lane** – The redevelopment of the site off Colliery Lane will be encouraged for B1 and B8 uses;
- **Emp5, Griff Clara** – The redevelopment of the Griff Clara site will be encouraged for B1, B2 and B8 uses;
- **Emp9, Planning Obligations** – The Council will seek appropriate planning obligations to meet any increased demand for social, community and public transport services and facilities that arise directly from a proposed development; and
- **Emp14, Protecting Employment Land** – The redevelopment or change of use of existing and committed employment land will only be permitted provided a number of criteria can be met including that there is no longer a requirement for that employment use, the location of the existing employment land would have an adverse affect on neighbouring residential areas and the proposed redevelopment would satisfy sustainability criteria.

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- 2.49 The Nuneaton and Bedworth Local Plan identifies enough employment sites to meet the requirement set out by the Warwickshire Structure Plan. It goes into further detail on how some of these sites should be implemented and how employment sites will be protected.

Nuneaton and Bedworth Core Strategy

- 2.50 The Core Strategy for Nuneaton and Bedworth is currently at the Issues and Options stage. Once adopted it will supersede the Local Plan. The Issues and Options document underwent a period of consultation between 8th June – 14th August 2009 with the Preferred Options document likely to be consulted on in September 2010.
- 2.51 The document will set out the Borough's spatial strategy and objectives to 2026. It will explain how these objectives are to be achieved and who will deliver them.
- 2.52 The Issues and Options document identifies that the Borough is likely to have to find land for at least 10,800 new dwellings (though the Panel Report to the RSS has subsequently increased this requirement to 11,000) during the period 2006 – 2026. Land has already been identified for 3,000 new homes. It is estimated that there is capacity within the existing urban fabric for further additional dwellings but around 6,000 homes will have to be provided on Greenfield sites.
- 2.53 The Issues and Options document identifies a requirement for 96 ha of employment land between 2006 and 2026 (though the Panel Report to the RSS has subsequently increased this requirement to 128ha). Around 45 ha of employment land has already been identified, with a further 51 ha to account for. It is likely that 41 ha of this will need to be provided on Greenfield land. In addition, there may be a need to identify a further 25-50 ha of land for a Regional Investment Site within, or close to, the Coventry and Nuneaton Regeneration Zone.

Annual Monitoring Reports

- 2.54 The Nuneaton and Bedworth Annual Monitoring Reports (AMR) cover the period from April 2004 to March 2009. In terms of employment land the 2007/08 report identifies a supply of around 77.58 ha of completed employment land from 1996, with a further 2.5 ha under construction (at April 2008) and 45.41 ha available for development. The 2008/09 report identifies that a further 6.08ha of employment land was completed between April 2008 and March 2009, a further 0.9ha was under construction and 47.75ha had planning permission or was allocated in the Local Plan. In total therefore, Nuneaton and Bedworth has a total of 132ha of employment land, which meets the Structure Plan target up to 2011.

Socio-Economic Review

2.55 This part of the Baseline Review identifies the key socio-economic characteristics of the Nuneaton and Bedworth Borough, comparing local statistics with those at a regional and national level. In this section we outline the current socio-economic position of Nuneaton and Bedworth Borough, using a variety of Census based and Nuneaton and Bedworth Borough Council data sources. We also provide an overview of the key indicators of the property market and economic development issues. Where possible, data for Nuneaton and Bedworth Borough has been compared to regional and national statistics.

Brief Socio-Economic Profile of Nuneaton and Bedworth Borough

2.56 This section provides an overview of the key socio-economic issues which have a direct relation to the production of this Employment Land Review (ELR). The key issues that are highlighted in this section are as follows:

- Population;
- Index of Multiple Deprivation;
- Skills;
- Economically active;
- Employment sector;
- Wages for residents and workforce; and
- VAT registrations.

Population

2.57 Table 2.3 below demonstrates the projected population increase for Nuneaton and Bedworth Borough during the period 2006 – 2031.

Table 2.3 – Population Projections for Nuneaton and Bedworth Borough 2006-2031

	Nuneaton and Bedworth Borough	West Midlands	United Kingdom
2006	120,700	5,367,000	50,763,000
2031	137,200	6,114,000	6,114,000
% Increase	13.7%	13.9%	19.0%

Source: Warwickshire Observatory (<http://www.warwickshireobservatory.org/>) (2008)

2.58 The projected population increase for Nuneaton and Bedworth is 13.7%. This is on par with the regional (13.9%) projected increase in population, but lower than the national average of 19%. This figure is trend based on the assumption that recent demographic trends continue into the future, i.e. the continued out migration of people from the major conurbations of the region to the District. The WMRSS is seeking to address this trend.

Index of Multiple Deprivation

2.59 The Index of Multiple Deprivation provides a relative ranking of areas across England based on a number of social and economic criteria. These are:

- Income;
- Employment;
- Health;
- Education;
- Skills and Training;
- Housing;
- Living Environment; and
- Crime.

2.60 Each local authority is given a score and these are then ranked to provide an indication of the level of relative deprivation within an area.

2.61 The 2007 Index of Multiple Deprivation gave Nuneaton and Bedworth an average score of 22.41 and a ranking of 112 out of 354 local authorities, showing that Nuneaton and Bedworth Borough is a relatively deprived area.

Skills

2.62 Table 2.4 below details the highest level of qualifications achieved by the population of Nuneaton and Bedworth Borough.

Table 2.4 – Qualifications within Nuneaton and Bedworth Borough

Qualification	Nuneaton and Bedworth Borough	West Midlands	Great Britain
NVQ4 and above	20.5%	24.6%	28.6%
NVQ3 and above	42.5%	42.0%	46.4%
NVQ2 and above	68.3%	61.1%	64.5%
NVQ1 and above	80.0%	75.4%	78.1%
Other Qualifications	9.5%	7.7%	8.8%
No Qualifications	10.5%	17.0%	13.1%

Source: Nomis (www.nomisweb.co.uk) – Annual Population Survey (December 2007)

- 2.63 As can be seen in Table 2.4 above, the percentage of Nuneaton and Bedworth Borough residents who achieve qualifications of Level NVQ4 and above¹ is around 20.5%, slightly lower than the percentage in both the West Midlands (24.6%) and Great Britain (28.6%), highlighting the fact that fewer residents within Nuneaton and Bedworth Borough enter higher and further education. The proportion of Nuneaton and Bedworth Borough residents with no qualifications (10.5%) is considerably lower than the regional average (17.0%) and slightly lower than the national average (13.1%), indicating that there is a high level of educational attainment within the Borough, particularly when compared with the West Midlands.

Economic Activity

- 2.64 Table 2.5 below demonstrates the percentage of the population of Nuneaton and Bedworth Borough that are economically active and economically inactive.

Table 2.5 – Economic Activity in Nuneaton and Bedworth Borough, September 2008

	Nuneaton and Bedworth Borough	West Midlands	Great Britain
Economically Inactive	19.8%	23.1%	21.2%
Wanting a Job	5.4%	5.3%	5.6%
Not Wanting a Job	14.4%	17.8%	15.6%
Economically Active	80.2%	76.9%	78.8%
Employees	68.7%	63.3%	64.8%
Self Employed	5.9%	8.4%	9.3%
Unemployed	5.7%	6.2%	5.3%

Source: Nomis (www.nomisweb.co.uk) – Annual Population Survey (September 2008)

¹ i.e. those with a degree, higher degree, NVQ levels 4 and 5; HNC; HND; qualified teacher status; qualified medical doctor; qualified dentist; qualified nurse; midwife; or health visitor

- 2.65 The percentage of economically active (80.2%) people within Nuneaton and Bedworth is higher than at the regional (76.9%) and national levels (78.8%), indicating higher than average participation rates in the labour market and demands for employment. The number of unemployed people living in Nuneaton and Bedworth Borough (5.7%) is slightly below that at a regional level (6.2%) but above national (5.3%) level.

Employment Sectors

- 2.66 Table 2.6 below illustrates the occupation groups of the resident population of Nuneaton and Bedworth Borough in 2001.

Table 2.6 – The Economic Structure of Nuneaton and Bedworth Borough

	Nuneaton and Bedworth Borough	West Midlands	England
Managers and Senior Officials	12.1%	14.0%	15.3%
Professional Occupations	8.0%	10.0%	11.2%
Associate Professional and Technical Occupations	10.9%	12.0%	13.8%
Administrative and Secretarial Occupations	12.6%	12.7%	13.4%
Skilled Trades Occupations	13.8%	13.3%	11.6%
Personal Service Occupations	7.1%	6.7%	6.9%
Sales and Customer Service Occupations	7.6%	7.4%	7.7%
Process, Plant and Machine Operatives	12.9%	10.9%	8.4%
Elementary Occupations	15.0%	13.0%	11.7%

Source: Neighbourhood Statistics (www.neighbourhoodstatistics.gov.uk) (2001)

- 2.67 A high percentage of the resident population of Nuneaton and Bedworth Borough are employed in elementary occupations (15.0%), skilled trade occupations (13.8%) or as process, plant and machine operatives (12.9%), reflecting the relatively poorly educated population or poor availability of skilled jobs in the Borough. The high proportion of Nuneaton and Bedworth Borough residents employed in elementary and trade occupations means that there is likely to be a high demand for industrial premises as opposed to office space in the Borough. A low percentage of the population of Nuneaton and Bedworth Borough residents are employed in managerial and professional occupations compared with a regional and national level.
- 2.68 Table 2.7 below demonstrates the distribution of employees by industry within the Borough when compared with regional and national figures.

Table 2.7 – Workforce Jobs by Industry within Nuneaton and Bedworth Borough (2007)

		Nuneaton and Bedworth Borough	West Midlands	Great Britain
Manufacturing		12.8%	14.0%	10.6%
Construction		4.7%	5.1%	4.9%
Services		82.4%	79.4%	83.0%
	Distribution, Hotels and Restaurants	28.2%	23.3%	23.3%
	Transport and Communications	10.2%	5.6%	5.9%
	Finance, IT and other business activities	17.4%	19.0%	21.6%
	Public Admin, Health and Education	22.9%	26.5%	26.9%
	Other Services	3.7%	5.0%	5.3%
Tourism-related		6.8%	7.7%	8.2%

Source: Nomis (www.nomisweb.co.uk) – Office for National Statistics Annual Business Inquiry Employee Analysis (2007)

- 2.69 Table 2.7 identifies a similar percentage of people working within the service sector in Nuneaton and Bedworth Borough (82.4%) to the national level (83.0%). Within the service sector, a large number of people work in distribution, hotels and restaurants (28.2%) compared to a regional (23.3%) and national (23.3%) level. Additionally, the proportion of people working in the Transport and Communications sector (10.2%) is significantly higher than for the West Midlands and Great Britain (around 6%).

Earnings

- 2.70 Table 2.8 below illustrates the average earnings for residents and the workforce population of Nuneaton and Bedworth Borough.

Table 2.8 – Average Gross Weekly Pay of People Living and Working in Nuneaton and Bedworth Borough (2008)

Group		Nuneaton and Bedworth Borough	West Midlands	Great Britain
Residents	Full-time Workers	£453.30	£450.00	£479.30
	Male Full-time Workers	£482.20	£488.30	£525.00
	Female Full-time Workers	£372.60	£388.30	£412.70
Workforce	Full-time Workers	£421.00	£448.90	£479.10
	Male Full-time Workers	£460.00	£488.70	£523.50
	Female Full-time Workers	£344.70	£379.40	£412.40

Source: Nomis (www.nomisweb.co.uk) – Office for National Statistics Annual Survey of Hours and Earnings (2008)

- 2.71 As can be seen in Table 2.8 above, residents of Nuneaton and Bedworth earn slightly above the regional average, yet below the national average with £453.30 per week compared with £450.00 per week in the West Midlands and £479.30 per week in Great Britain. The average earnings of residents compared with the earnings of those working in Nuneaton are higher (£453.30 compared to £421.00), which may indicate that a significant proportion of residents of Nuneaton & Bedworth work outside the Borough. The workforce tend to earn, on average, less than those in the region (£448.90) and nationally (£479.10).

VAT Registered Businesses

- 2.72 The number of businesses, together with the percentage of registrations and de-registrations in Nuneaton and Bedworth Borough in 2007 is shown in Table 2.9 below.

Table 2.9 – VAT Registered Businesses within Nuneaton and Bedworth Borough (2007)

	Nuneaton and Bedworth Borough	West Midlands	Great Britain
Registrations	11.2%	9.4%	10.2%
Deregistrations	7.7%	7.2%	7.3%
Stock (at end of year)	2,845	-	-

Source: Nomis (www.nomisweb.co.uk) – BEER (2007)

- 2.73 As can be seen in Table 2.9 above, the number of registered businesses in Nuneaton and Bedworth Borough (11.2%) is higher than that at a national level (10.2%) but higher than that at a regional level (9.4%). The number of deregistered businesses in Nuneaton and Bedworth Borough is also slightly higher than that at a regional and national level.
- 2.74 Overall there were more registrations than de-registrations in 2007, therefore indicating growth of the economy. However, due to the current economic downturn, this trend may have been reversed in 2008.

Commuting

- 2.75 The commuting patterns of the resident population of Warwickshire are shown in Table 2.10 below.

Table 2.10 - Commuting Patterns within Warwickshire

	Percentage commuting by car/van	Percentage commuting by public transport	Percentage commuting outside their home district
Nuneaton & Bedworth	73.4	5.8	51.2
North Warwickshire	75.3	4.4	59.5
Rugby	70.2	4.8	39.9
Stratford-on-Avon	70.4	3.1	41.9
Warwick	68.8	5.3	36.4
Warwickshire	71.2	4.8	42.4

Source: Census, 2001

- 2.76 The data from the Census shows that almost half of employed people living in Nuneaton and Bedworth travel outside the Borough to their place of work. This is higher compared with a number of local authorities in the County such as Warwick, Rugby and Stratford-on-Avon. This reflects the pull of the stronger economies of neighbouring cities such as Coventry and Birmingham, which have the attraction of a wide range of skilled jobs, coupled with the excellent transport links that, whilst are of benefit to the Borough in terms of attracting investment, also mean that commuting outside of the area is a viable option for the resident population.

Summary

- It is predicted that the population of Nuneaton and Bedworth Borough will grow between 2006 and 2031 by 13.7% which is broadly at the same rate of population growth in the West Midlands, but below that of the UK;
- Table 2.4 illustrates that the resident population of Nuneaton and Bedworth Borough is relatively poorly skilled with just 20.5% achieving NVQ4 and above which is lower than the population of West Midlands and the UK;
- Nuneaton and Bedworth is a relatively disadvantaged area with a 2007 Index of Multiple Deprivation ranking of 112 out of 354 local authorities (where 1 is the poorest scoring authority);
- Table 2.7 indicates a heavy reliance on industrial markets within Nuneaton and Bedworth with a large proportion of the resident population employed in elementary and trade occupations;

- The economy of Nuneaton and Bedworth Borough is growing as illustrated by the larger number of business registrations than de-registrations in 2007. However, due to the market downturn, this may have slowed or reversed in 2008; and
- The current pattern of commuting shows that almost half of residents in the Borough travel outside Nuneaton and Bedworth to their place of work. In order to address this, the Borough will need to attract more skilled, better paid employment to the area, through the provision of high quality employment premises.

Stakeholder Interviews

2.77 As part of the evidence gathering process, a number of interviews were undertaken with key stakeholders from across Nuneaton and Bedworth and the wider sub-region. The purpose of these interviews was to gain a greater understanding of the issues affecting the demand for, and supply of employment land within Nuneaton and Bedworth. This included talking to planning officers, inward investment officers, local commercial agents and the education sector. A number of stakeholders recommended to the consultant team by the Client were unresponsive to invitations to be part of the ELR process. After three attempts to invite stakeholders, no further contact was made. A full list of stakeholders who were interviewed as part of this process is shown in Table 2.11 below.

Table 2.11 – List of Stakeholders Interviewed as part of the ELR Process

Name	Organisation
Peter Thomason	Advantage West Midlands
Suzanne Clear	Advantage West Midlands
Rebecca Miles	Advantage West Midlands
Guy Hands	Cartwright Marston
Pat Moroney	Deeley Properties
John Pugh	Loveitts
Andrew Pittaway	North Rae Sanders
Robert Rae	North Rae Sanders
Richard Morcombe	North Warwickshire and Hinckley College
Andrew Daw	Nuneaton & Bedworth Borough Council
Rose Selwyn	Nuneaton & Bedworth Borough Council
David Penn	Shortland Horne
Adam Weaver	Smithsgore
David Hill	Warwickshire County Council
Sackie Somal	Warwickshire Investment Partnership

Source: GVA Grimley, 2010

2.78 Below, we have summarised the key themes that arose from the stakeholder interviews.

Supply of Employment Land

2.79 The key issues relating to the supply of employment land were:

- Key locations for employment land at present are Bermuda Park, Bayton Road Industrial Estate, Attleborough Fields Industrial Estate, Pool Road Industrial Estate, Shepperton Business Park, Hemdale Business Park, Century Park and Prologis Park;
- Overall there is a lack of supply of large units, which means that Nuneaton and Bedworth struggles to attract larger occupiers;
- There is a north-south divide with larger occupiers tending to locate to the south of Nuneaton town centre, where there is better access to the motorway network. Land to the north of Nuneaton town centre is seen as being less accessible and therefore commands lower rental values than land to the south;
- There is an east – west divide with east of the Borough being favoured due to better transport links. Land to the west is fairly inaccessible due to the network of local roads and areas of residential; and
- Land south of the M6 seen as being more related to Coventry than Nuneaton, but this has some positive impacts as rental values tend to be higher than land north of the M6.

Nuneaton and Bedworth's Economy

2.80 The key characteristics of Nuneaton and Bedworth's economy were identified as being as follows:

- There is an over reliance on manufacturing and public sectors (e.g. hospitals, schools, council), whereas the economy is weak in sectors such as finance, knowledge based and creative industries and ICT which has lead to a low productivity rate (now the lowest in Warwickshire);
- Supply of land for businesses looking to relocate to the Borough is low, which leads to higher prices, although they are still lower than neighbouring areas such as Coventry. Companies tend to choose to locate in other areas of the County such as Warwick, Stratford or Coventry due to them having a better skilled population and superior housing stock;
- The economy is made up largely of small employers (up to five employees), with few large companies (50+ employees);

- Potential to expand the economy using the strong manufacturing presence as a base for growth in high value manufacturing, research and development (building on the two universities in the area and the presence of companies such as Mira), applied learning and environmental technologies. An increase in sectors related to distribution type uses would not be welcome within Nuneaton and Bedworth;

Growth within Nuneaton and Bedworth

- Nuneaton should continue to be the main centre within the Borough, although there will need to be improvements to the overall image of the centre to achieve a competitive market;
- Nuneaton and Bedworth needs to focus on its position within the country, excellent linkages, lower rents and close relationships to Coventry and Birmingham;
- Growth within Nuneaton and Bedworth should be employment led, rather than housing led, in order to ensure sustainable growth within the Borough and discourage out-commuting;
- Infrastructure improvements are required to unlock land to the west of the A444 and the area around the Longshoot to the east of Nuneaton town centre. Employment growth should be well connected to the A444 as this offers the most convenient connection to the M6. Public transport connections along the A444, such as the proposed railway line from Nuneaton to Coventry would be a welcome addition, however this also could encourage greater out-commuting to Coventry;
- There is likely to be a rise in certain sectors (such as construction and technologies relating to sustainable homes) as a result of the housing growth that is forecast within Nuneaton and Bedworth; and
- Land to the south of the M6 offers the most lucrative development opportunities for employment as it is adjacent to the M6 at Junction 3.

Employment Land Demand

2.81 Stakeholders have highlighted the following issues in relation to the demand for employment land within Nuneaton and Bedworth Borough:

- Demand for employment has decreased in the last 12 months, with space becoming increasingly more difficult to let. This has led to a reduction in rental and freehold values and a halt to speculative building;

- There is little in the way of an office market at present. Nuneaton and Bedworth town centres and the newly built Eliot Park have struggled to attract office occupiers to date. The only demand for offices is at out of town locations such as Bermuda Industrial Park and Attleborough Fields;
- There is likely to be greater demand for smaller units (less than 5,000 sq ft) and start up units, which could also encourage entrepreneurship and innovation in the local population and assist in the formation of new businesses; and
- Demand for further education is likely to increase in the current economic climate, particularly for apprenticeships, on-the-job training and National Vocational Qualifications (NVQs); therefore there could be demand for additional educational facilities relating to North Warwickshire and Hinckley College.

Future Employment Locations

2.82 Stakeholders have identified the following as being key future employment locations within the study area:

- **Bermuda Park** – occupies the best location in terms of the industrial / distribution / office market. There are still plots remaining to be developed, though some of these (such as the plots to the far west), may be more suited to residential development;
- **The Arbury Estate** – a key development opportunity with potential for a mix of employment, residential and new infrastructure to the west of the A444;
- **ProLogis** – a few plots remaining here and excellent access to the M6 motorway, although related more to Coventry than Nuneaton and Bedworth;
- **Pool Road Industrial Estate** – potential to develop land to the north east and west – would be dependent on land being largely in WCC ownership;
- **Bayton Road Industrial Estate** – a reasonably successful estate with a number of redevelopment opportunities;
- **Judkins Quarry** – Potentially a good site but not ideally located in relation to Nuneaton town centre to make it very attractive to the market as access to the A444 and M6 motorway are time consuming. However, the right mix of uses, including residential and retail, would make it economically viable and an attractive proposition for prospective developers, especially if the site area were extended across the railway line up towards the A444.

Skills

- 2.83 Stakeholders identified the following key themes in terms of the skills of the workforce population of Nuneaton and Bedworth (both present and future workforce);
- Nuneaton seen as having a low skilled workforce, with a high proportion of workers in manual / unskilled labour – this is due largely to Nuneaton’s history as a commuter town to Coventry where many of Nuneaton’s residents worked in the automotive industry. Now that the majority of these employers have closed down, this has had a huge impact on Nuneaton’s workforce who have failed to adapt to the changing economic climate. This has had a knock effect that prospective businesses are no longer attracted to Nuneaton and Bedworth, preferring to go to places such as Warwick, Stratford and Coventry, where there are more highly skilled workforces;
 - There is a strong manufacturing skill base within the Borough – it will be important that this evolves and adapts to new emerging business sectors in order for Nuneaton and Bedworth to have a successful, growing economy; and
 - Educational institutes in the Borough, such as North Warwickshire and Hinckley College have responded to the current economic downturn by assisting those people who are looking for employment to gain the appropriate vocational and basic skills. During times of recession this demand increases significantly.
- 2.84 The next section of this report analyses the property market within Nuneaton and Bedworth Borough.

3. PROPERTY MARKET ANALYSIS

Introduction

- 3.1 In this section of the report, we provide an overview of the office and industrial property markets within the study area. For each we examine the following topics:
- The key locations, quality of existing stock, new build and pipeline development;
 - Occupational market conditions, including leasehold and freehold values; available properties and market competition;
 - Investment market conditions; and
 - The market for development land.
- 3.2 This section concludes with a summary of the main characteristics of the Borough's commercial property market. Industrial accommodation is much more prevalent in the study area when compared to offices, and as such, this section focuses on industrial accommodation, and highlights key office locations where relevant.

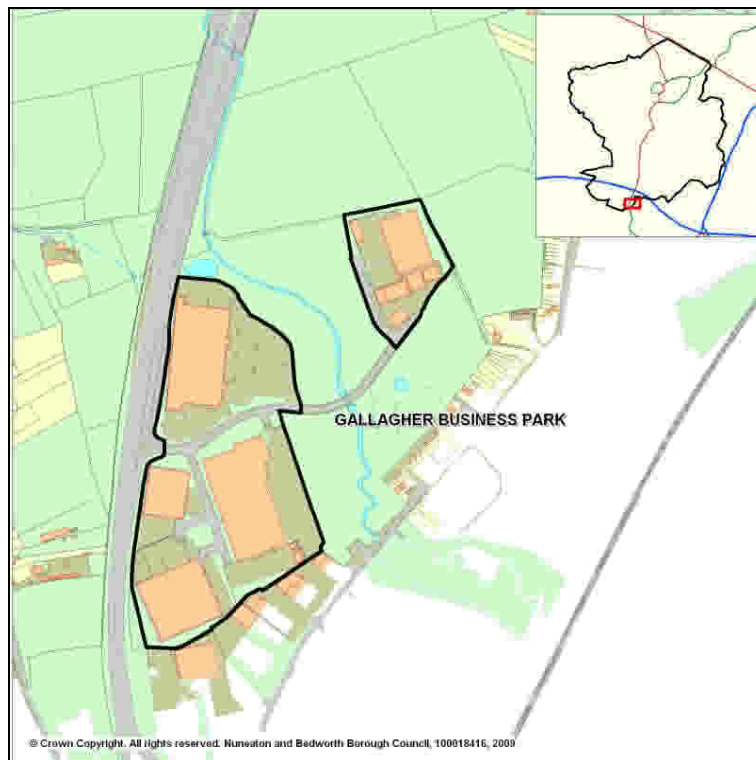
Key Locations

Industrial / Distribution

- 3.3 This section highlights key locations and discusses the industrial / distribution market conditions. There are a number of industrial areas throughout the study area which are of local and regional significance.

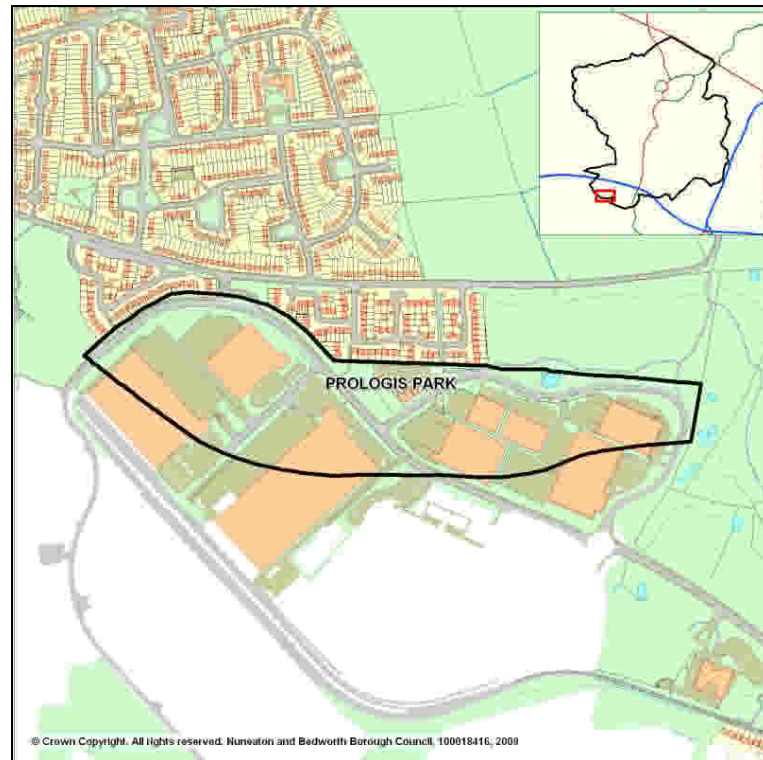
Gallagher Business Park

Figure 3.1 - Location of Gallagher Business Park



Source: GVA Grimley, 2010

- 3.4 Gallagher Business Park is situated to the south west of the study area, to the south of M6 Junction 3, shown in Figure 3.1 above. The estate is accessed from the A444 and is approximately 9.9ha in size. The existing site comprises mostly industrial accommodation, although a large retail unit (formerly occupied by Macro) is also located here. Industrial units are typically of modern, steel portal frame construction with profile metal cladding to the walls and roofs. There are a number of small speculatively built units which are vacant at the rear of the business park.
- 3.5 There is an area of undeveloped land to the rear, although it is believed that this land is undevelopable for industrial purposes, as it forms part of a flood attenuation area. In addition, there is an area of undeveloped land to the south and west of the park, although it is anticipated that this area of land forms part of a buffer to the residential land lying to the south, and hence is not developable for industrial/distribution purposes. Key occupiers on the park include Melville, City Link and Telent.
- 3.6 The former Macro unit is currently available on a freehold and leasehold basis, and extends to 9707.5 sq m (104,000 sq ft).

*Prologis Park, Coventry***Figure 3.2 - Location of Prologis Park, Coventry**

Source: GVA Grimley, 2010

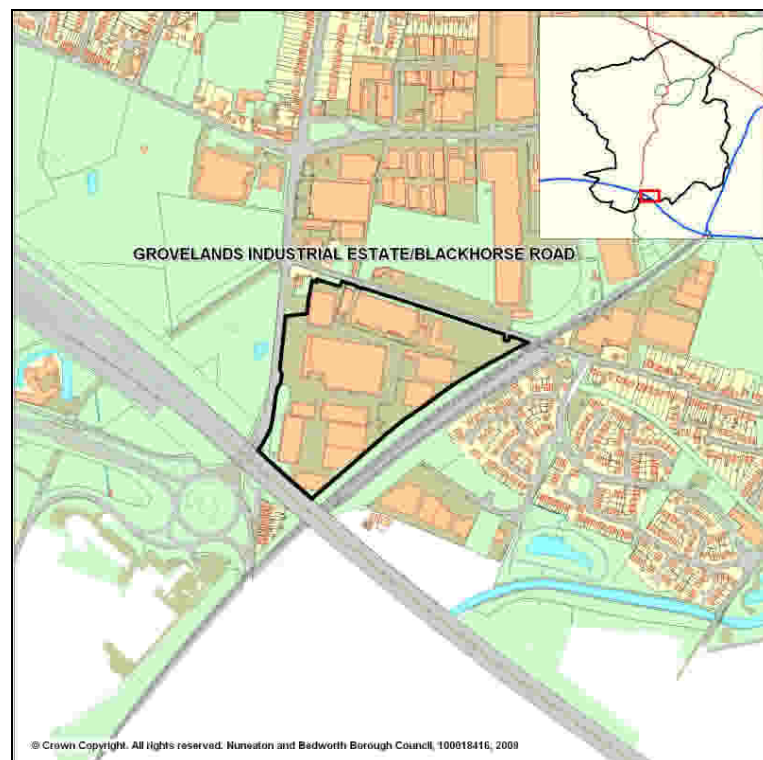
- 3.7 Prologis Park is located in the south of the study area on the edge of the Coventry conurbation. Part of the park lies within the Nuneaton and Bedworth Borough, however, over 50% of the park lies within Coventry. The area of the park that lies within Nuneaton and Bedworth Borough is approximately 16.2ha.
- 3.8 Prologis own the majority of the park, who are a specialist industrial developer of international significance. The site was formerly used as a colliery. The majority of existing units have been developed within the last eight to ten years, are of modern construction and high specification, and cater towards the requirements of distribution occupiers. As a consequence, many of the units are above 5,000 sq.m (53,820 sq.m), and are of high quality specification. The park also benefits from an existing rail freight connection, which is mainly used by DHL to service the 'Danone' water contract, however, they are in the process of relocating. In addition, there is no rail terminal, and as such GVA Grimley industrial surveyors believe that this facility is used on an intermittent basis.
- 3.9 There is an area of land available for development on a 'design and build' basis for units from 929 to 16,258 sq m (10,000 to 175,000 sq ft) in size. One new building has been developed

on a speculative basis comprising approximately 9,755 sq m (105,000 sq ft) is available and being marketed by D&P Holt. In addition, Colliers CRE are letting a modern unit which comprises 7,990 sq m (86,000 sq ft). The majority areas of land readily available for expansion are within the Nuneaton and Bedworth Borough.

- 3.10 Key occupiers include third party logistics operators DHL, a Co-op distribution centre and Terex.

Grovelands Industrial Estate

Figure 3.3 - Location of Grovelands Industrial Estate



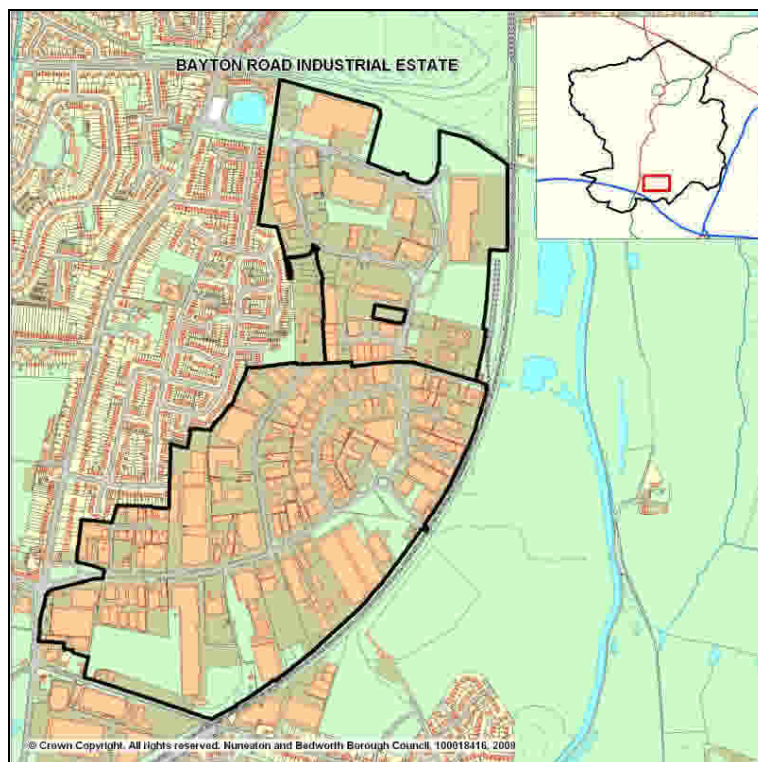
Source: GVA Grimley, 2010

- 3.11 This industrial estate is located to the west of Junction 3 M6, and is accessed off Longford Road. The estate extends to around 7.2ha and comprises a variety of industrial buildings from the 1960s to 1980s eras. Buildings vary in specification and quality from brick built units with low eaves heights, limited loading facilities in average condition. There are a number of modern steel profile buildings also present, which are generally in better condition. Some buildings have been the subject of recent refurbishment programmes. The estate offers units ranging from 222.95 to 2,229.5 sq m (2,400 to 24,000 sq ft).

- 3.12 There is a two storey office building on site which is from the inter / post war era, of brick construction. This building has been recently refurbished. Two lettings of single wings of this building are current under offer to two local occupiers.

Bayton Road Industrial Estate

Figure 3.4 - Location of Bayton Road Industrial Estate



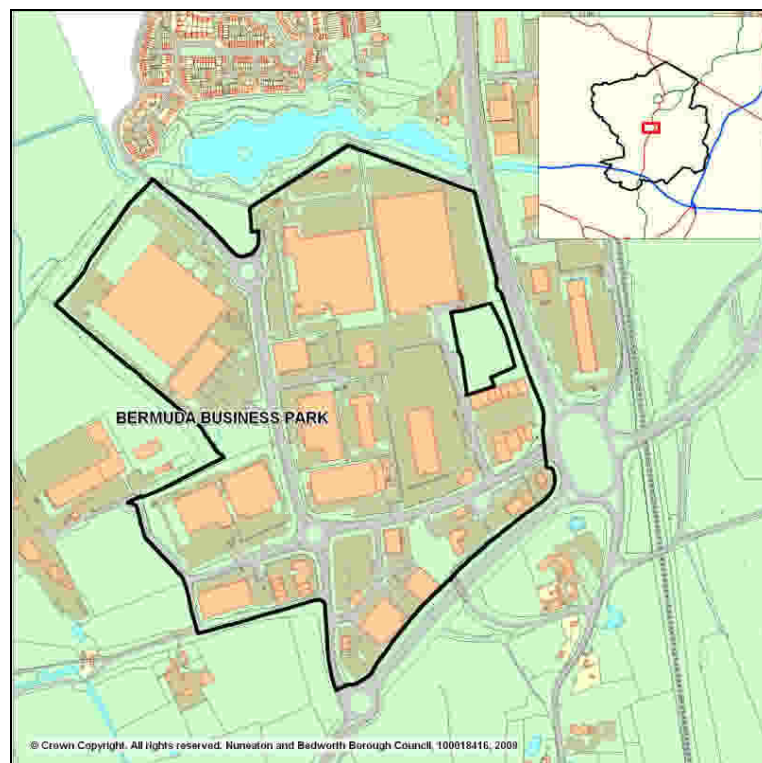
Source: GVA Grimley, 2010

- 3.13 Bayton Road Industrial Estate is situated to just to the north of Grovelands Industrial estate, to the west of Junction 3 M6 and is accessed from the Coventry Road Exhall. It comprises around 70.3ha and is the largest single employment area in the Borough. Similar to the Grovelands Industrial Estate, a variety of industrial buildings from the 1960s to 1980s eras can be found here, with buildings ranging from brick built units with low eaves heights, to more modern buildings of steel profile construction. There is a large area of land to the north of the estate which could be considered for expansion purposes in the future. In addition, a fuel terminal is also located on part of this estate. There are a number of smaller units known as ‘Colliery Court’, although it appears that several of these units are currently vacant.
- 3.14 Although a number of the buildings have been refurbished on the estate, one issue is the quality of the environment on this estate, given that many of the estate roads do not appear to be adopted or effectively managed by those responsible for their upkeep. There is an area of

expansion land marketed by Countrywide which is understood could accommodate a building up to 3,716 sq m (40,000 sq ft). There has been a recent application by Loades plc for a mixture of unit sizes and there are likely to be further redevelopment opportunities on this estate in the future given the age and condition of the stock. Occupiers on the estate tend to be of local or sub regional significance; however, there are several occupiers of regional / national significance such as Ocado (Waitrose) and Murco.

Bermuda Business Park

Figure 3.5 - Location of Bermuda Business Park

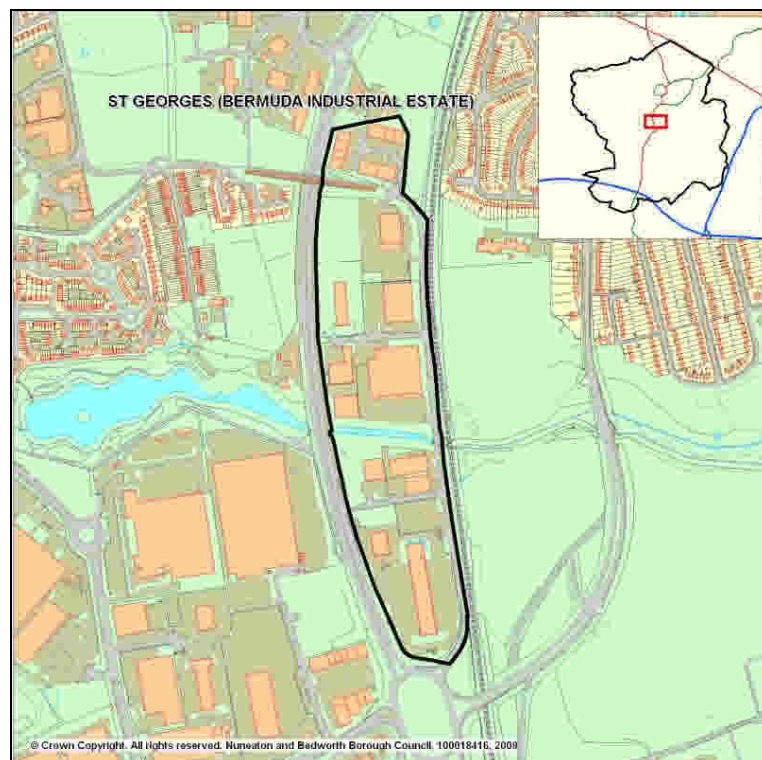


Source: GVA Grimley, 2010

- 3.15 Bermuda Business Park is located approximately equidistant between Nuneaton and Bedworth town centres, and is one of the premier industrial areas in the study area. Access is gained off the A444 which runs north south from Nuneaton to Coventry. This provides good access to Junction 3 M6 to the south, but also access to Nuneaton and the A5 further to the north. The total area of the park is around 53.5ha.
- 3.16 The estate comprises a mix of modern industrial and commercial buildings which have been developed approximately from the 1990s onwards. There are a number of retail/trade counter units at the front of the estate adjacent to the A444. Occupiers here tend to be of national

- significance and include Screw Fix. Other uses on the park include a separate leisure area, a budget hotel and a public house / restaurant.
- 3.17 There is a significant amount of industrial space on the park, which tends to cater towards the demand of distribution occupiers seeking larger industrial/distribution units. Typical occupiers include Unipart, Dairy Crest, Norbert, Langstone Plastics, Bermuda Innovation centre and RS Components.
- 3.18 To the rear is a larger warehouse unit owned by Deeleys, which is currently on the market. However, access to this unit may concern potential occupiers, given that access is gained through residential areas. In addition, there is a modern housing estate to the rear of the industrial area, and a number of areas for expansion at the rear of the estate.
- 3.19 A key area for potential expansion is to the rear of Langstone Plastics, which planned to accommodate a 19,045 sq m (205,000 sq ft) industrial distribution unit available on a design and build basis. Alternatively, the site could accommodate smaller units from 4,645 sq m (50,000 sq ft) subject to planning permission.

St. Georges (Bermuda Industrial Estate)

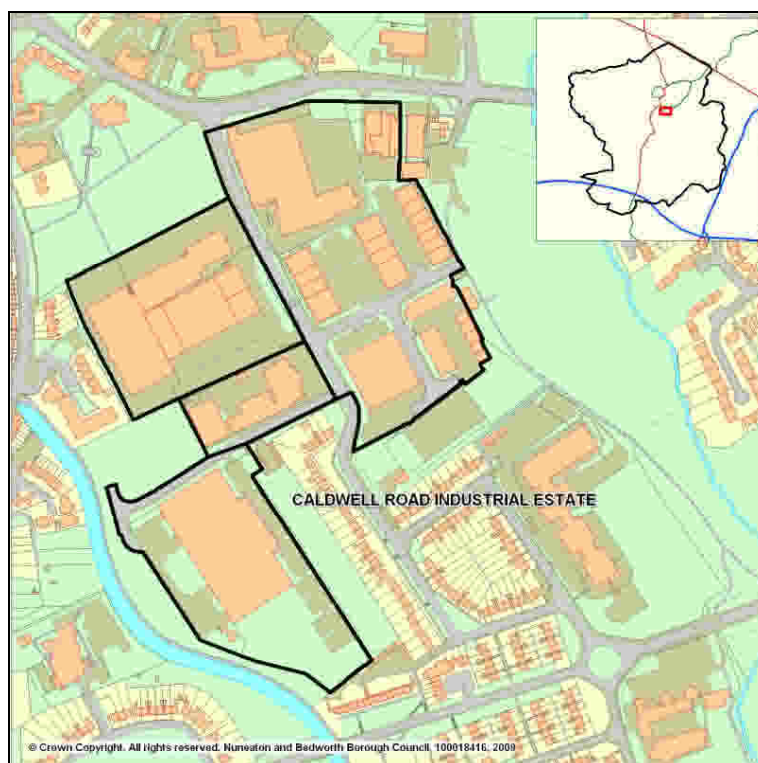


Source: GVA Grimley, 2010

- 3.20 St. Georges (Bermuda Industrial Estate) is situated to the east of Bermuda Business Park, just to the north of the A444 Island. It is bounded by the A444 to the west and a railway line to the east and comprises around 18ha. Most of the estate was used by ‘UPS’. The front of the estate has been cleared, and is now being marketed by ATIS REAL Chartered Surveyors for open storage (B8) uses, having originally been marketed for industrial development. Renault Trucks have recently commenced their operations from this site.

Caldwell Road Industrial Estate

Figure 3.6 - Location of Caldwell Road Industrial Estate



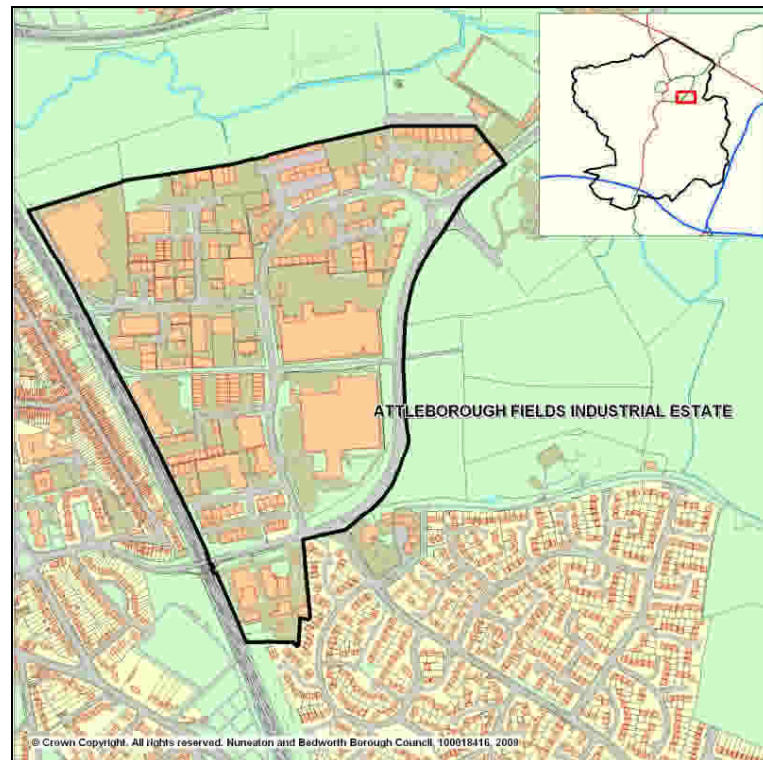
Source: GVA Grimley, 2010

- 3.21 Caldwell Road Industrial estate is situated to the south of Nuneaton, and is accessed off Avenue Road to the east of the A444. The estate extends to around 10.7ha and comprises steel portal frame industrial buildings from the 1970s to 1980s, although there are a number new buildings known as Eden Business Park which have been speculatively developed being marketed by North Rae Sanders. Units range from 159 to 585 sq m (1,712 to 6,303 sq ft), and have 6 metre eaves heights, are of steel profile construction and have designated parking and loading areas.
- 3.22 Evans Easy Space are also located in this industrial area, and occupy new industrial units (subletting them to individual occupiers to provide flexible business space). To the rear is

Shepperton Business Park. The key occupier on this part of the estate is Triton, who occupy a large unit to the rear of Shepperton Business Park.

Attleborough Fields Industrial Estate

Figure 3.7 - Location of Attleborough Fields Industrial Estate



Source: GVA Grimley, 2010

- 3.23 Attleborough Fields Industrial Estate is situated to the east of Nuneaton, and is accessed off Eastboro Way to the north, which in turn provides good access to the A47, leading to the A5 to the north.
- 3.24 The estate extends to around 31.7ha and comprises modern buildings of steel portal frame construction. There are a number of distribution occupiers of regional and national significance, such as Holland and Barrett, TNT, Norbert and Dulux. Nuneaton Rugby club is situated to the rear. There are also older buildings on the estate ranging from 1960s to 1980s style buildings, which are generally well occupied. There is a 1 hectare (2.6 acre) development site available adjacent to the estate known as Attleborough Fields. This site is being marketed for office development.

Hemdale Business Park

Figure 3.8 - Location of Hemdale Business Park



Source: GVA Grimley, 2010

- 3.25 Hemdale Business Park is located on Eastboro Way, just to the north of Attleborough Fields Industrial Estate. There are a number of smaller industrial units that appear to have been built on a speculative basis which are being marketed. Key occupiers include 'BITO' and Butcher Hydraulics.

Other Industrial / Distribution Locations

- 3.26 There are a number of other smaller industrial developments located throughout the study area, most of which are focussed around the Nuneaton area, as highlighted below:
- **Whitacre Road** – This estate is located to the north east of Nuneaton to the south west of the Horeston Grange residential area. The estate is accessed via St Nicholas' Road through a mainly residential area. Industrial units are typically of brick construction, and are in average condition with low eaves heights, although there are a number of more modern buildings on the estate of steel portal frame construction. There are a number of units that are vacant on the estate. Key occupiers include Magnet and Gardene

Aerospace. There is one office building which appears to have been built by an occupier of the estate to cater for their operational purposes;

- **Holman Way, Attleborough** - Located off Attleborough Road, just to the east of Nuneaton. This estate is surrounded by a residential area, and provides a mix of industrial units from the 1970s to 1980s which are in average to good condition. Whilst the access to this estate is via residential areas, there are a number of trade counter occupiers of national significance on this estate such as Speedy Hire, Plumb Centre and Howdens. There are also offices available in Albion Quarter, a brick built office building on the edge of the estate;
- **Pool Road Industrial Estate (Camp Hill)** – This industrial estate is located in the Camp Hill area to the west of Nuneaton town centre. It is accessed via Arrow Road to the north which leads to Turtle Bank, or via Hilary Road to the south through mainly residential areas. There are a variety of buildings in this area, many of which are in poor condition and are nearing the end of their useful economic life. There are also areas used for open storage purposes. Smart Development (Midlands) Ltd are currently developing proposals at the Midland Quarry site to the north which will include a mixed use development incorporating 5400 sq. ft. of B1 / B2 industrial usage; and
- **Marston Hall Industrial Park** - There are a number of industrial units in Marston Jabbett, a small hamlet situated to the east of Bedworth town centre. Units are of steel portal frame construction, appear to be relatively modern and cater to the needs of local occupiers. There are some offices near to the site, which appear to have been converted from a former agricultural use. Access to the site is gained, via Marston Lane. However, all vehicular access routes are subject to restrictions. To the west of the site is the Coventry Canal; the only crossing point is Marston Bridge, where a 10 tonne weight restriction applies. The only other access is to the east. However, access via the east is limited by a 12 foot height restriction. These factors severely restrict access to the estate, prohibit large vehicles from reaching the area and constrain the area's attractiveness to potential industrial occupiers.

Offices

- 3.27 The office market is divided into two main sub-markets; the town centre market and the out-of-town market. There is little office accommodation of significance in the Borough when compared to surrounding centres, but also when contrasted with the study area's industrial market.

3.28 Neighbouring out of town markets outside of the study area of Coventry, Leamington and Warwick cater towards occupiers of local, regional and national significance, and have therefore witnessed significant new-build development in recent decades. In contrast, office development in the Borough has been piecemeal, and has mostly focused on out of town location in the form of 'courtyard' schemes (such as Eliot Business Park). Stand alone units on industrial estates have also been built on a design and build basis to meet specific occupier requirements, however, examples of this are fairly limited. One example includes Ashbrook Court, Prologis Park, which comprises 5,000 sq m (50,000 sq ft) and is currently available on the market.

3.29 There are a limited amount of purpose built office buildings in Nuneaton and Bedworth town centres, although these buildings tend to be occupied by either local authorities or organisations carrying out a civic function, rather than catering to the needs of businesses or occupational requirements from the wider market.

3.30 Key office locations in the study area are highlighted below:

- **Eliot Business Park** is a small courtyard style office park speculatively developed by Deeley Properties Limited, situated to the south west of Nuneaton Town Centre located next to George Eliot Hospital. It is located to the south of Nuneaton town centre to the North of Bedworth town centre, to the west of the A444 which provides direct access to J3 M6 to the south.

The offices are set out in a secure 'Courtyard' style configuration and comprise small, self contained office units, with their own front doors with access control, have allocated car parking and flexible layouts to allow sub-letting. Typical office specifications range from 182 to 930 sq m (1,959 to 10,011 sq ft), and includes column-free open plan offices, carpeted raised floors, suspended ceilings, recessed light fitting and double glazed windows. In addition, the Eliot Park Innovation Centre (EPIC) is a modern office building providing office suites from 25 to 179 sq m (269 to 1927 sq ft) which are available on flexible licence or lease terms. The EPIC caters towards the requirements of technology and knowledge based small to medium sized enterprises, and provides business support, training, and workshop, meeting / conference rooms. Key occupiers on the park include St John Ambulance and the Department of Work and Pensions.

Quoting rents on Eliot Business Park are believed to be in the order of £161.46 per sq m (£15 per sq ft) however, discussions with local agents suggest that rental transactions are more likely to fall within the range of £134.55 to £139.93 per sq m (£12.50 to £13 per sq ft). Freehold capital values were believed to be in the order of £1,776 per sq m (£165 per

sq ft) prior to the market downturn, however, discussions with local agents suggest that £1,245.49 per sq m (£125 per sq ft) is now more appropriate.

Despite this location providing the only speculative new build office accommodation in the study area of significance, local market agents highlight that there are a number of units that remain vacant. This is a function of the limited demand for office accommodation throughout the study area.

- **Nuneaton Town Centre** is the larger neighbour to Bedworth, and is located in the north of the study area. As with Bedworth town centre, the office market caters towards occupiers of local, and perhaps regional, significance. However, most larger office occupiers tend to operate a civic rather than market function. Examples include the 'Justice Centre' located to the north of the town centre, which has recently been completed. This area of the town centre is earmarked as an 'office quarter', which will in the future seek to accommodate new office development, catering towards the needs of local firms providing professional services. Given its sustainable location near to Nuneaton railway station, this location in Nuneaton town centre is best placed to accommodate any future aspirations for office development in Nuneaton town centre, and it is expected that office development in the town centre will be addressed through the emerging Town Centre Capacity Study.

There are a number of purpose built office buildings in Nuneaton town centre of significance. Nuneaton Police Station is located within the Justice Centre, and Fed Ex occupy an older 1960s / 1970s style building on Bond Gate. The Job Centre occupy a modern building to the east of Bridge Street adjacent to the River Anker. Nuneaton Bedworth Borough Council (NBBC) occupy two office buildings on Coton Road to the east of the town centre.

Most of the office accommodation in Nuneaton is focussed towards the requirements of local businesses, and much of the office accommodation comprises either upper floors of retail units or former retail units used for 'A2' Financial and professional services, as apposed to B1a uses. However, such quasi retail/office uses are outside the scope of this employment land review.

- **Bedworth Town Centre** has several larger office buildings dating from the 1960s to 1980s era, which are occupied by local authorities. One such example is Kings House, occupied by Warwickshire County Council (WCC). In addition, domestic appliance insurer Domestic and General has offices in Bedworth town centre, which provide substantial

employment for the local community. Facilities in the town centre include a leisure centre, Civic Hall and train station.

Aside from those highlighted above, there is limited office accommodation of significance in Bedworth town centre. The centre caters mainly for local businesses, and much of the office accommodation comprises either upper floors of ground floor retail units and retail units used for 'A2' (Financial and Professional Services).

Occupier requirements tend to be for small amounts of office space where flexible lease terms are required. Tenants are typically of local and perhaps sub-regional significance. There are a number of smaller office units available on the market.

Investment Market

- 3.31 Investment yields have seen a sharp rise in the last year as a consequence of the 'credit crunch', the subsequent downturn in the property investment market and wider recession of the UK economy. An increase in investment yields will, all other things remaining equal, cause a fall in the value of properties purchased as an investment (with a tenant in place generating a rental return). The current climate has seen the flight of both institutional and debt backed investors from the property investment market.
- 3.32 Investment yields have seen a further rise throughout 2008, as market conditions have deteriorated further after the near collapse of a number of the UK's leading financial institutions in the third quarter of 2008. Prior to the downturn, GVA Grimley research indicated that prime industrial yields were as low as 5.75% in the West Midlands, with correspondingly high capital values achievable for such investments. As such, the yields quoted below are based upon limited investment evidence, and should be viewed with a high degree of caution.
- 3.33 Prime industrial yields in the wider Coventry area are in the order of 8%, according to GVA Grimley in house research. In the current market uncertainty, it is likely that investment yields in 2009 will be in the order of 8-9%. GVA Grimley in house research suggests that prime office yields are as high as 8.5% in the study area, which is higher than those anticipated for industrial development. Office yields are usually lower than industrial yields, and this research provides a further indication of both the abnormality of prevailing market conditions and the level of uncertainty that exists across all property sectors.
- 3.34 Many property investments in the study area are unlikely to provide prime investment stock, and have the yields applicable to such properties will be significantly above prime yields. As

such, with correspondingly lower investment values are likely to be applicable in the study area.

Occupational Market Conditions

- 3.35 This section focuses on the industrial / distribution market conditions relevant to the study area. Office market conditions specific to the key locations identified are considered above, given that the office space in the study area plays a more muted role in the study area.
- 3.36 The local industrial market has demonstrated healthy levels of take up over the last five to 10 years and demand has generally come from local / regional companies trading up to larger / newer properties. There has been selective speculative development throughout the study area.

Rental Values

- 3.37 GVA Grimley research shows that prime industrial rents have remained relatively static over three to five years being in the order of £62 psm (£5.25 psf) for new accommodation in the Coventry area. However, in the last quarter, rents have seen their first decline since records began (2002) to £54 psm (£5.00 psf). This is an indication of falling occupational demand as a consequence of prevailing property market conditions and wider economic uncertainty.
- 3.38 The prime rent achievable depends upon the specification and size of the units. In general, smaller units of up to 93 sq m (1,000 sq ft) are best placed to achieve higher rents (as shown by Table 3.1). As with land values, pressure is now being applied to rents given the current economic conditions, as occupiers are re-considering (and sometimes postponing) their property requirements in light of the UK Economy's recession. It should be noted that the majority of industrial accommodation in the study area is older in nature and hence nearing the end of its useful economic life.

Recent Transactions

- 3.39 The majority of recent transactions (particularly for larger units) derive from the distribution sector, as opposed to the industrial / manufacturing sector. This reflects the national picture which has, over the last five to 10 years, shown a reduction in the fortunes of the UK's manufacturing base.
- 3.40 Table 3.1 below shows the 10 most recent (known) industrial transactions both in the study area and surrounding industrial locations as follows:

Table 3.1 – Industrial Market – Recent Transactions

Location	Type / Quality of Stock	Area	Rental Value	Transaction Date
Unit 1 Attleborough Industrial Estate, CV11 6RS	Light industrial business unit	46 sq m (500 sq ft)	£75.35 psm (£7.00 psf)	28.03.09
Unit 1 Trident Business Park, CV11 4PN	Industrial park	661 sq m (7,110 sq ft)	£45.42 psm (£4.22 psf)	15.03.09
Unit 10 Hemdale Business Park, CV11 6GL	General Industrial	256 sq m (2,759 sq ft)	£63.34 psm (£5.88 psf)	15.02.09
Former A Plant Premises, CV11 6SQ	Industrial garage / workshop	580 sq m (6,241 sq ft)	£301,650	31.10.08
Gallagher Business Park, CV6 6PA	Industrial park	3,914 sq m (42,125 sq ft)	£54.36 psm (£5.05 psf)	16.07.08
Bayton Road Industrial Estate, CV7 9RJ	General Industrial	274 sq m (2,950 sq ft)	£43.06 psm (£4.00 psf)	15.07.08
Unit 5 Bayton Road Industrial Estate, CV11 9EJ	Industrial Park	414 sq m (4,459 sq ft)	£36.21 psm (£3.36 psf)	15.05.08
Haunchwood Park Drive, CV10 9SP	Industrial Park	595 sq m (6,400 sq ft)	£50.37 psm (£4.60 psf)	15.05.08
36 Whitacre Road, CV11 6BY	General Industrial	238 sq m (2,566 sq ft)	£50.35 psm (£4.68 psf)	01.05.08
Oaston Road, CV11 6JX	Light industrial with yard and office space	195 sq m (2,100 sq ft)	Not stated	15.04.08

Source: EGi (July 2009)

- 3.41 Turning to the study area, the prime rental values of new build industrial accommodation, if any were available, would probably be in the region of £54 psm (£5.00 psf), with rents of secondary accommodation (depending on exact condition, specification and size ranging from £32 - £46 psm (£2.00 to £4.00 psf). Freehold values lie in the order of £323 - £753 psm (£15 - £65 psf) depending upon size, condition and specification, however the latter are rarely available in the study area.
- 3.42 Table 3.2 highlights recent office transactions in both the study area and surrounding industrial locations as follows:

Table 3.2 – Office Market – Recent Transactions

Location	Area	Value	Transaction Date
21 Coton Road, CV11 5TJ	72 sq m (780 sq ft)	Not stated	23.02.09
2A Henry Street, CV11 5SQ	239 sq m (2,571 sq ft)	£210,000	15.12.08
Unit 9 Eliot Business Park, CV10 7RH	465 sq m (5,000 sq ft)	Not stated	29.07.08
1 Coton Road, CV11 5TQ	49 sq m (532 sq ft)	£101.17 psm (£9.40 psf)	15.04.08
Unit 7 Eliot Business Park, CV10 7RH	182 sq m (1,960 sq ft)	Not stated	10.03.08

Source: EGi (July 2009)

3.43 The above highlights that there are limited office transactions in the study area upon which to base an opinion of rental value. This is a consequence of the limited amount of office accommodation in the study area.

Availability

3.44 As of 15th July 2009 there were circa 100 available industrial properties in Nuneaton and Bedworth Borough. Table 3.3 below highlights some available properties in the study area.

Table 3.3– Industrial Market – Availability

Location	Area	Quoting Price	Comments
Unit 22 Alliance Business Park, CV11 6SD	160 sq m (1,725 sq ft)	£147,500 pa £920 sq m (£85.50 sq ft)	<ul style="list-style-type: none"> • Single storey industrial unit; • Office facilities; • Agent – Cartwright Marston.
Unit 23 Alliance Business Park, CV11 6SD	137 sq m (1,470 sq ft)	£125,000 pa £915 sq m (£85 sq ft)	ES16. Modern, brick built; ES17. Agent – Cartwright Marston.
Unit 18 Alliance Business Park, CV11 6SD	137 sq m (1,470 sq ft)	£6,500 pa £48 sq m (£4.42 sq ft)	<ul style="list-style-type: none"> • Two storey unit; • Agent – Loveitts.
Warehouse 5, Bayton Road Industrial Estate, CV7 9EL	921 sq m (9,910 sq ft)	£34,685 pa £37.67 sq m (£3.50 sq ft)	<ul style="list-style-type: none"> • Large open plan warehouse; • 3.5 m eaves height; • Agent – North Rae Sanders.
42 Bayton Road, CV7 9EJ	339 sq m (3,650 sq ft)	£11,862 pa £34.87 sq m (£3.24 sq ft)	<ul style="list-style-type: none"> • Open plan warehouse; • Agent – Shortland Horne
Warehouse 10, Bayton Road Industrial Estate, CV7 9EL	2,775 sq m (29,867 sq ft)	£104,534.50 pa £37.67 sq m (£3.50 sq ft)	<ul style="list-style-type: none"> • Large open plan warehouse; • Agent – North Rae Sanders.
Units 3-4 Buckingham Close, CV10 7JT	939 sq m (10,108 sq ft)	£55,600 pa £59.20 sq m (£5.50 sq ft)	<ul style="list-style-type: none"> • Perimeter trunking; • Roller shutter doors; • Agent – Innes England.
Unit 3a Eden Business Park, CV11 4NR	221 sq m (2,375 sq ft)	£13,694.85 pa £62 sq m (£5.76 sq ft)	<ul style="list-style-type: none"> • High specification shell units; • Agent - North Rae Sanders.
Unit 2 Central Avenue, CV11 5AW	342 sq m (3,686 sq ft)	£8,500 pa £24.70 sq m (£2.30 sq ft)	<ul style="list-style-type: none"> • Single storey premises; • Two workshop areas; • Agent – Loveitts.

Location	Area	Quoting Price	Comments
Unit 1 Bermuda Trade Centre, CV10 7RA	436 – 872 sq m (4,692 – 9,384 sq ft)	£79,764 pa	<ul style="list-style-type: none"> • Flexible shell units; • Two available; • Agent - North Rae Sanders.
Unit 3 Attleborough Fields Industrial Estate, CV11 6RS	126 sq m (1,361 sq ft)	£8,500 pa £65.76 sq m (£6.11 sq ft)	<ul style="list-style-type: none"> • Agent – Castle Commercial.
Unit 2 Paragon Way, CV7 9QS	472 sq m (5,076 sq ft)	£19,000 pa £40.25 sq m (£3.74 sq ft)	<ul style="list-style-type: none"> • Steel portal frame warehouse and office; • Agent – Countrywide Property Management.
Pool Road Industrial Estate, CV10 9AE	35 – 1,634 as m (378 - 17,588 sq ft)	£40,000 pa	<ul style="list-style-type: none"> • Two bay unit; • Office accommodation; • Agent – Howkins & Harrison.

Source: FOCUS (July 2009)

3.45 The above highlights that a range of rental values are applicable in the study area depending upon size, specification and quality of units. However, in prevailing market conditions, many available properties are taking longer to secure tenants/occupiers, and landlords/owners are increasing rental incentives to induce potential occupiers to secure a commitment to enter into lease agreements.

3.46 As of 15th July 2009 there were circa 50 available office properties in Nuneaton and Bedworth Borough. These are detailed in Table 3.4 below.

Table 3.4 – Office Market – Availability

Location	Area	Quoting Price	Comments
3 Abbey Gate, CV11 4EH	(339 – 1,386 sq ft)	£8,000 per annum	<ul style="list-style-type: none"> • First and second floor offices available; • Agent – Adam Perrey & Co.
7 Church Way, CV12 8NA	45 sq m (488 sq ft)	£6,950 per annum (£153.27 psm, £14.24 psf)	<ul style="list-style-type: none"> • Ground floor office; • Agent – Nuneaton and Bedworth Borough Council.
Unit 3 Evans Business Centre, CV11 4NF	44 sq m (475 sq ft)	£7,260 per annum (£164.47 psm, £15.28 psf)	<ul style="list-style-type: none"> • Self contained office; • Single storey; • Agent – Evans Easyspace Ltd.
Unit 4 Evans Business Centre, CV11 4NF	60 sq m (650 sq ft)	£8,820 per annum (£145.95 psm, £13.56 psf)	<ul style="list-style-type: none"> • Modern office unit; • Agent – Evans Easyspace Ltd.
1 Century Way, CV11 5NE	274 sq m (2,950 sq ft)	£18,500 per annum (£67.48 psm, £6.27 psf)	<ul style="list-style-type: none"> • Open plan office; • Agent – Countrywide Property Management.
264 Queens Road, CV11 5LY	26 sq m (284 sq ft)	£4,500 per annum (£170.5 psm, £15.84 psf)	<ul style="list-style-type: none"> • Small retail / property office; • Agent – Hawkins Commercial.
Eliot Business Park, 4 The Courtyard, CV10 7RH	(1,960 sq ft)	£29,400 per annum (£15 psf).	<ul style="list-style-type: none"> • High specification; • Agent – King Sturge.

Source: FOCUS (July 2009)

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- 3.47 The above shows that quoting rents for office accommodation are generally higher than industrial rents, and range between £150 sq m to £161 sq m (£14-15 sq ft) for new build office accommodation to circa £54-£65 sq m (£5-6 sq ft) for office accommodation of lowest quality.

Competition

- 3.48 The majority of competing accommodation is located on the edge of the main centres of Leamington and, to a lesser degree, Warwick, to the north and south of Coventry, Rugby, Hinckley (Logix Park, Dodwells) and Tamworth which attracts industrial occupiers. In addition, the A5 corridor is a key distribution location in the area, examples further afield including Magna Park, Lutterworth, Hams Hall and Birch Coppice. The south of the study area around the A444 corridor is a key industrial location, evidenced by the presence of Prologis and Gallagher Business Parks.
- 3.49 The supply of new industrial units is limited at present, with few units under development and the majority of developers with B1 / B2 / B8 sites seeking pre let agreements / pre sales on a design and build, rather than providing units speculatively to the market. This trend is set to continue as few developers are currently considering speculative development due to the lack of funding and lack of occupier confidence.
- 3.50 Other regional locations with a supply of existing modern units are likely to attract 'footloose' regional occupiers who need units immediately rather than waiting nine to 12 months for units to be built.

Industrial Land Values

- 3.51 As with other sectors of the property market, downwards pressures on industrial land values have been experienced in the current market conditions. This is due to increases in investment yields (discussed above) which have lowered the value of the end development, and increases in developer's margins to reflect risk and return. In addition, the shortage of debt finance and deterioration of wider economic conditions have subdued the appetite of industrial developers for speculative industrial development. Factors such as the changes to Empty Rates liability and introduction of Energy Performance Certificates (EPC) have provided additional concerns throughout 2008 and into 2009.
- 3.52 In the study area, very few land sales have occurred in the last 12-18 months and, as is the case within the office market, a number of sites have been controlled by a range of developers for some time. These developer's aspirations are typically for higher value uses, as opposed to industrial / warehouse uses.

-
- 3.53 GVA Grimley industrial surveyors estimate that a cleared site with planning consent for B1 / B2 / B8 uses would achieve a land value in the order of £617,750 - £679,525 per hectare (£175 - £225,000 per acre). There are few transactions to support this view, and land values quoted should be viewed with caution in light of current market conditions.
- 3.54 Many occupiers are unwilling to sell of land at a lower level than which they bought the land 3-10 years ago. Some vendors still have unreasonable expectations of the values of their land holdings which could result in large tracks of otherwise developable land remaining undeveloped for a long period of time. Office land values are particularly uncertain in the study area, and as such are likely to be within the range anticipated for industrial land or perhaps at a slight premium. However, given the limited amount of office accommodation in the study area, there are little (if any) transactions or land available on the market to support this proposition.

Summary

- 3.55 Industrial accommodation is more prevalent in the study area when compared to offices, the latter playing a less significant role in the local property market. There are a limited amount of purpose built office buildings in Nuneaton and Bedworth town centres, although these buildings tend to be occupied by local authorities or organisations carrying out a civic, rather than market, function.
- 3.56 Eliot Business Park is the only speculatively built new office development of significance in the study area. However, local agents suggest that demand for accommodation on this business park has been limited, and at present a number of office suites remain vacant. This is a consequence of the market's perception of the attractiveness of the study area to potential office occupiers, and hence demand for office space in the area is more subdued when compared to the demand for industrial premises.
- 3.57 There are a number of industrial areas throughout the study area which are of local and regional significance. Prime industrial locations in the area tend to be situated with excellent connections to the A444, and include Gallagher Business Park, Prologis Park, Bermuda Business Park, Attleborough Industrial Estate and Hemdale Business Park. These locations have been the focus of new build industrial development in recent decades.
- 3.58 The majority of industrial areas comprise older industrial stock of varying degrees of ages and quality, which the market perceives as 'secondary' to the prime locations highlighted above. Examples include Grovelands Industrial Estate and Bayton Industrial Estate, located in the southern section of the study area. In addition, there are a number of secondary industrial

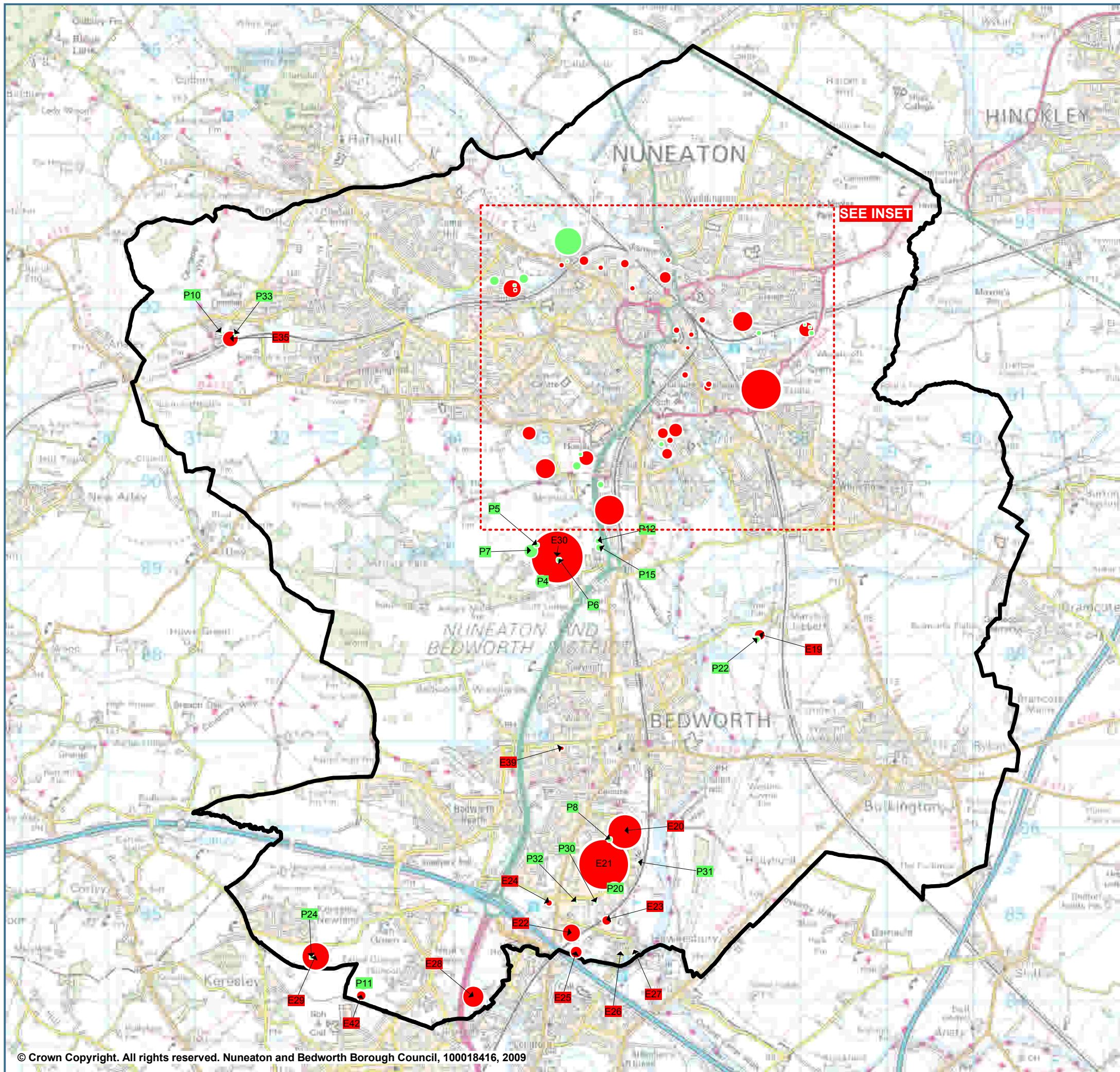
- estates situated around the suburbs of Nuneaton, examples including Caldwell Road Industrial Estate.
- 3.59 Industrial areas of less significance include Whitacre Road, Holeman Way, Attleborough and Pool Road Industrial Estate. These industrial areas provide a mix of accommodation, the majority of which caters towards the local market and hence attracts occupiers of local and sometimes regional significance. Buildings in these areas are more likely to reach the end of their useful economic life over the course of the plan period, and hence these areas could provide opportunity sites for either industrial or residential re-development in the future.
- 3.60 Both office and industrial investment yields have seen a sharp rise throughout 2008 and 2009, as a consequence of the 'credit crunch', the subsequent downturn in the property investment market and wider recession of the UK economy. Prime industrial yields in the wider Coventry area are in the order of 8%, according to GVA Grimley in house research. In the current market uncertainty, it is likely that investment yields in 2009 will be in the order of 8-9%. GVA Grimley in house research suggests that prime office yields are as high as 8.5% in the study area, which unusually is higher than those anticipated for industrial development. However, many property investments in the study area are unlikely to provide prime investment stock, and have the yields applicable to such properties will be significantly above prime yields, with correspondingly lower investment values.
- 3.61 The local industrial occupational markets have demonstrated healthy levels of take up over the last five to 10 years, and demand generally derives from local / regional companies trading up to larger / newer properties. GVA Grimley research shows that prime industrial rents have remained relatively static over three to five years being in the order of £62 psm (£5.25 psf) for new accommodation around the wider Coventry area. However, in the last quarter, rents have seen their first decline since records began (2002) to £54 psm (£5.00 psf). This is an indication of falling occupational demand as a consequence of prevailing property market conditions and wider economic uncertainty. In the study area, prime rental values of new build industrial accommodation (if any were available) would probably be in the region of £54 psm (£5.00 psf), with rents of secondary accommodation (depending on exact condition, specification and size) ranging from £32 - £46 psm (£2.00 to £4.00 psf).
- 3.62 The majority of competing accommodation is located on the edge of the main centres of Leamington and, to a lesser degree, Warwick and to the south of Coventry, although Tamworth attracts industrial occupiers as well. In addition, the A5 corridor is a key distribution location in the area, key distribution locations further afield including Magna Park, Lutterworth.

The south of the study area around the A444 corridor is a key industrial location, evidenced by the presence of both Prologis and Gallagher Business Parks.

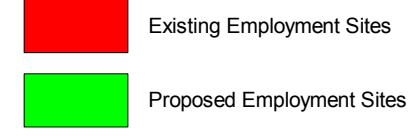
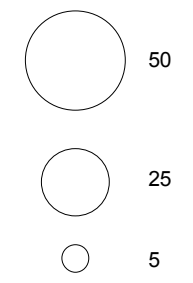
- 3.63 As with other sectors of the property market, downwards pressures on development land values have been experienced in the current market conditions and factors such as the changes to Empty Rates liability and introduction of Energy Performance Certificates (EPC). Few land sales have occurred in the last 12-18 months, and a number of sites have been controlled by a range of developers for some time. Developer's aspirations are typically for higher value uses, as apposed to industrial / warehouse uses. In addition, some vendors still have unreasonable expectations of the values of their land holdings which could result in large tracks of land being available and undeveloped for a long period of time.

4. REVIEW OF EMPLOYMENT LAND SUPPLY

- 4.1 This section of the report provides a review of the existing supply of employment land within the Nuneaton and Bedworth Borough Council administrative area. The review comprises three elements:
- A quantitative and qualitative assessment of employment land supply;
 - Recommendations for a new portfolio of employment land; and
 - A capacity assessment.
- 4.2 The supply of employment land in Nuneaton and Bedworth consists of three components:
- Existing employment land which will continue to serve the needs of businesses within the area throughout the Plan period. This category includes employment land that was currently in use at the time of the study;
 - Identified proposed employment sites that may be developed within the Plan period and contribute to meeting future employment land requirements. This categorisation includes employment sites that were under construction at the time of the study, those with planning permission for employment uses, those that are the subject of a published development brief or employment allocations within the Local Plan; and
 - Sites that are identified for employment uses within NBBC's Strategic Land Availability Assessment (SLAA). Sites to be considered in the SLAA were submitted over a six week period which started on Monday 9th June 2008 and ended on Friday 18th July 2008. These sites are due to be reviewed on an annual basis in accordance with best practice.
- 4.3 The review of these components includes both quantitative and qualitative elements (in accordance with ODPM guidance). Figure 4.1 and Figure 4.2 below show the broad location and quantum of both existing employment land and proposed employment sites within Nuneaton and Bedworth (though not SLAA sites). More detailed site plans can be seen at Appendix A. In identifying these sites we have use data provided to the Consultant Team by NBBC as well as reviewing Annual Monitoring Reports produced by NBBC. The following paragraphs review the characteristics of these sites in more detail.



Size of Employment Sites (ha)



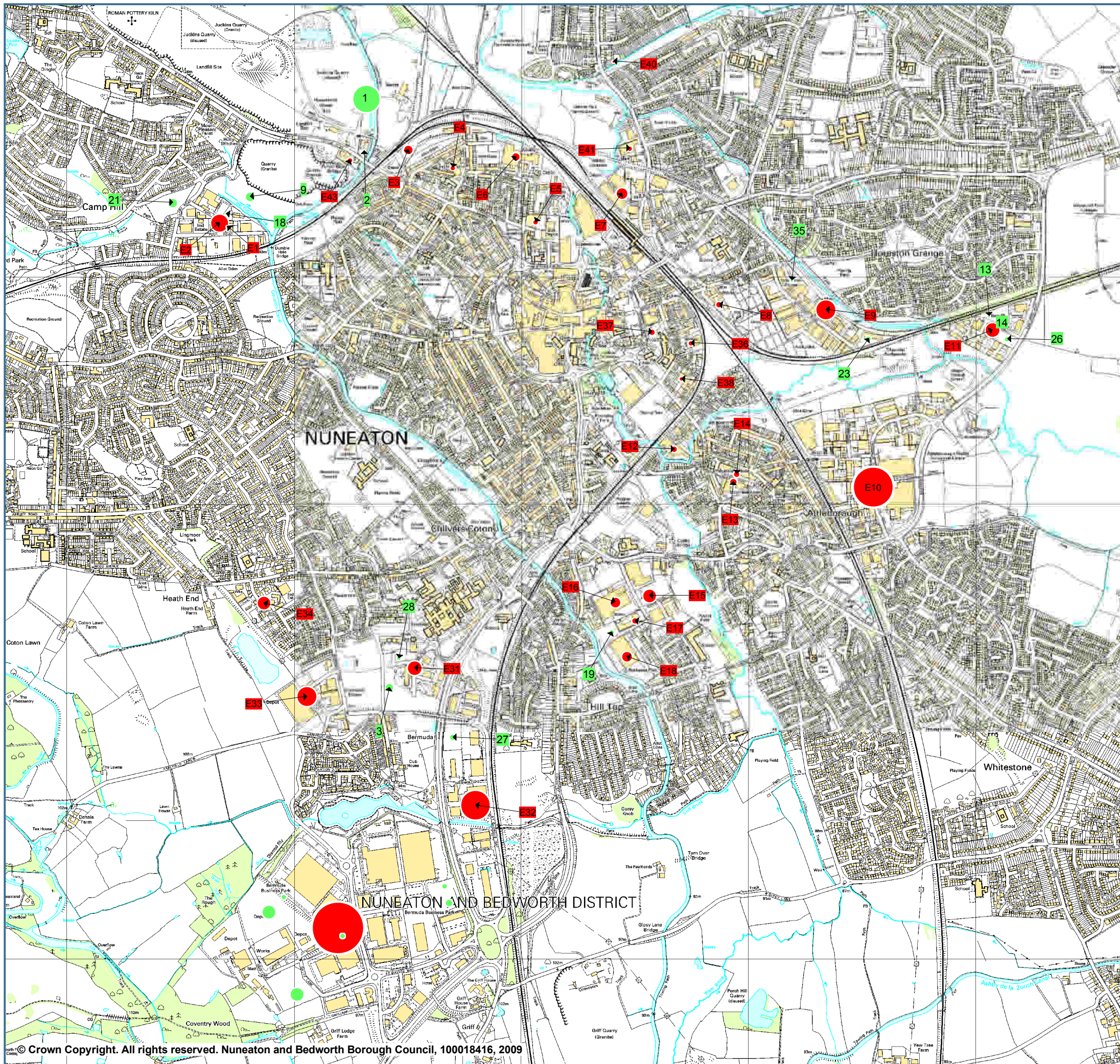
Site References

- | | |
|---|---|
| E1 - Pool Road Business Centre | E42 - Ashbrook Court |
| E2 - Pool Road Industrial Estate | E43 - Tuttle Hill |
| E3 - Midland Road Rail Network | P1 - Midland Quarry Tuttle Hill (North Of) |
| E4 - Aston Industrial Estate | P2 - Judkins Tuttle Hill |
| E5 - Bath Road | P3 - Paradise Farm |
| E6 - St Mary's Road | P4 - Griff Clara |
| E7 - Weddington | P5 - Griff Clara |
| E8 - Oaston Road | P6 - Bermuda Park |
| E9 - Whitacre Road | P7 - Griff Clara |
| E10 - Attleborough Fields | P8 - Colliery Lane Bedworth |
| E11 - Hemdale Business Park | P9 - Camp Hill Urban Village - Midland Quarry |
| E12 - Seymour Road | P10 - Haunchwood Park Drive Nuneaton |
| E13 - Trident Business Park 1 | P11 - Prologis Park |
| E14 - Trident Business Park 2 | P12 - Bermuda Park |
| E15 - Caldwell Road Industrial Estate 1 | P13 - Hemdale Business Park |
| E16 - Caldwell Road Industrial Estate 2 | P14 - Hemdale |
| E17 - Caldwell Road Industrial Estate 3 | P15 - Bermuda Park |
| E18 - Shepperton / Centrovell | P18 - Pool Road Industrial Estate |
| E19 - Marston Jabbett | P19 - Shepperton Business Park |
| E20 - Bayton Road Industrial Estate 1 | P20 - Bayton Road Industrial Estate |
| E21 - Bayton Road Industrial Estate 2 | P21 - Camp Hill Urban Village |
| E22 - Grovelands Industrial Estate | P22 - Marston Jabbett |
| E23 - Part of Blackhorse Road Industrial Estate | P23 - Whitacre Road Industrial Estate |
| E24 - School Lane | P24 - Prologis Park |
| E25 - The Moorings Business Park | P26 - Hemdale Business Park Nuneaton |
| E26 - Blackhorse Road Industrial Estate | P27 - Bermuda 1 |
| E27 - Hawkesbury Lane Industrial Centre | P28 - Paradise Farm |
| E28 - Gallagher Business Park | P30 - Bayton Road Industrial Estate |
| E29 - Prologis Park | P31 - Bayton Road Industrial Estate |
| E30 - Bermuda Industrial Estate 1 | P32 - Bayton Road Industrial Estate |
| E31 - Eliot Park | P33 - Haunchwood Park |
| E32 - St Georges | P35 - Whitacre Industrial Estate |
| E33 - Hazell Way Industrial Estate | |
| E34 - Tenlons Road Industrial Estate | |
| E35 - Haunchwood | |
| E36 - King Edward Road | |
| E37 - Justice Centre | |
| E38 - Anker Street | |
| E39 - Newton Road | |
| E40 - Heritage Business Centre | |
| E41 - Weddington Road | |

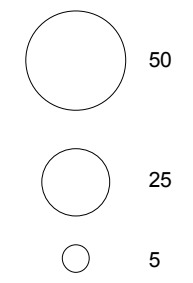
NUNEATON AND BEDWORTH BOROUGH COUNCIL EMPLOYMENT LAND REVIEW

FIGURE 4.1 - LOCATION OF EMPLOYMENT LAND WITHIN NUNEATON AND BEDWORTH





Size of Employment Sites (ha)



- Existing Employment Sites
- Proposed Employment Sites

Site References

- | | |
|--|---|
| <ul style="list-style-type: none"> E1 - Pool Road Business Centre E2 - Pool Road Industrial Estate E3 - Midland Road Rail Network E4 - Aston Industrial Estate E5 - Bath Road E6 - St Mary's Road E7 - Weddington E8 - Oaston Road E9 - Whitacre Road E10 - Attleborough Fields E11 - Hemdale Business Park E12 - Seymour Road E13 - Trident Business Park 1 E14 - Trident Business Park 2 E15 - Caldwell Road Industrial Estate 1 E16 - Caldwell Road Industrial Estate 2 E17 - Caldwell Road Industrial Estate 3 E18 - Shepperton / Centrovell E19 - Marston Jabbett E20 - Bayton Road Industrial Estate 1 E21 - Bayton Road Industrial Estate 2 E22 - Grovelands Industrial Estate E23 - Part of Blackhorse Road Industrial Estate E24 - School Lane E25 - The Moorings Business Park E26 - Blackhorse Road Industrial Estate E27 - Hawkesbury Lane Industrial Centre E28 - Gallagher Business Park E29 - Prologis Park E30 - Bermuda Industrial Estate 1 E31 - Eliot Park E32 - St Georges E33 - Hazell Way Industrial Estate E34 - Tenlons Road Industrial Estate E35 - Haunchwood E36 - King Edward Road E37 - Justice Centre E38 - Anker Street E39 - Newton Road E40 - Heritage Business Centre E41 - Weddington Road | <ul style="list-style-type: none"> E42 - Ashbrook Court E43 - Tuttle Hill
<ul style="list-style-type: none"> P1 - Midland Quarry Tuttle Hill (North Of) P2 - Judkins Tuttle Hill P3 - Paradise Farm P4 - Griff Clara P5 - Griff Clara P6 - Bermuda Park P7 - Griff Clara P8 - Colliery Lane Bedworth P9 - Camp Hill Urban Village - Midland Quarry P10 - Haunchwood Park Drive Nuneaton P11 - Prologis Park P12 - Bermuda Park P13 - Hemdale Business Park P14 - Hemdale P15 - Bermuda Park P18 - Pool Road Industrial Estate P19 - Shepperton Business Park P20 - Bayton Road Industrial Estate P21 - Camp Hill Urban Village P22 - Marston Jabbett P23 - Whitacre Road Industrial Estate P24 - Prologis Park P26 - Hemdale Business Park Nuneaton P27 - Bermuda 1 P28 - Paradise Farm P30 - Bayton Road Industrial Estate P31 - Bayton Road Industrial Estate P32 - Bayton Road Industrial Estate P33 - Haunchwood Park P35 - Whitacre Industrial Estate |
|--|---|

NUNEATON AND BEDWORTH BOROUGH COUNCIL EMPLOYMENT LAND REVIEW

FIGURE 4.2 - LOCATION OF EMPLOYMENT LAND WITHIN NUNEATON AND BEDWORTH (INSET MAP)



i) Existing Employment Land within Nuneaton and Bedworth

- 4.4 This definition includes existing employment land that was in use at the time of the study. Data on these sites was supplied by Nuneaton and Bedworth Borough Council to GVA Grimley. A total of 43 sites, comprising 291.06ha were identified. GVA Grimley have subsequently undertaken an independent assessment of each site, based upon site visits by surveyors from GVA Grimley. This assessment included a range of market, sustainability and physical assessment criteria using a standard proforma to record details of each area. Details of the proforma can be found at Appendix B.

Quantitative Assessment

- 4.5 As mentioned above, GVA Grimley have undertaken independent site assessments of each employment site in the Study area, using the information supplied by the Client as a base. We have added value in terms of providing Agency and Planning advice to the assessments which were undertaken by surveyors from our team. It should be borne in mind that this analysis reflects existing baseline conditions for the sites assessed and does not take into account any proposed improvements / investment to any of these areas of existing employment activity.
- 4.6 Using the scores from the proforma, we have been able to undertake some quantitative analysis of the scores based around three character themes; market, physical and sustainability, which is detailed below. A more qualitative assessment, considering each site's strengths and weaknesses, can be found in the Property Market Review (Section 3).

Market Assessment

- 4.7 Detailed site assessments are provided at Appendix C. Here we have summarised the market based characteristics of the employment land supply. The market assessment takes account of the following characteristics:
- Access;
 - Prominence;
 - Site Layout;
 - Character of Area;
 - Economic Constraints;
 - Strategic Location; and

- Market Attractiveness.

4.8 The scores are then ranked into a number of categories which determine how well the site scored. Full details of this methodology are detailed at Appendix D. Table 4.1 below shows the results of this analysis.

Table 4.1 – Summary of Market Scores of the Existing Employment Land Supply

	No of Sites	% of Sites	Total Land (ha)
Poor	5	12%	3.79
Average	17	40%	200.09
Good	15	35%	43.51
Excellent	6	14%	43.88
Total	43	100%	291.27

Source: GVA Grimley, 2010

4.9 As can be seen in Table 4.1 above, a total of 17 sites (40%) were scored as average quality in terms of their market attractiveness, accounting for around 200ha, well over two thirds of the total supply. A further 35% (15 sites) were scored as good and seven sites were scored as being excellent in terms of their market attractiveness, amounting to a total of 44ha of land being considered excellent in terms of market opportunity in the future. Five sites were considered to be poor, which were Bath Road, Aston Industrial Estate, Caldwell Road Industrial Estate 3, Tuttle Hill and Seymour Road.

Physical Assessment

4.10 Detailed site assessments can be seen at Appendix C. Here we have summarised the physical based characteristics of the employment land supply. The physical assessment takes account of the following characteristics:

- Building Age;
- Building Quality;
- General External Environment; and
- Local Access.

4.11 The scores are then ranked into a number of categories which determine how well the site scored. Full details of this methodology are detailed at Appendix D. Table 4.2 below shows the results of this analysis.

Table 4.2 – Summary of Physical Scores of the Existing Employment Land Supply

	No of Sites	% of Sites	Total Land (ha)
Poor	3	7%	1.54
Average	15	35%	33.37
Good	11	26%	107.01
Excellent	14	33%	149.35
Total	43	100%	291.27

Source: GVA Grimley, 2010

- 4.12 As can be seen above in Table 4.2, 33% (14 sites) were scored as excellent, in terms of their physical characteristics, providing a total land supply of 149ha, which represents around half of the existing employment land supply. This includes around 54ha at Bermuda, 24ha at Bayton Road and 16ha at ProLogis.
- 4.13 A total of 35% (15 sites) were scored as average in terms of their physical characteristics, and a further 11 sites (26%) were scored as good. The remaining three sites were scored as poor and included Newtown Road, Aston Industrial Estate and Bath Road.

Sustainability Assessment

- 4.14 Detailed site assessments can be seen at Appendix C. Here we have summarised the sustainability based characteristics of the employment land supply. The sustainability assessment takes account of the following characteristics:
- Public Transport;
 - Local Amenities; and
 - Strategic Location.
- 4.15 The scores are then ranked into a number of categories which determine how well the site scored. Full details of this methodology are detailed at Appendix D. Table 4.3 below shows the results this analysis.

Table 4.3 – Summary of Sustainability Scores of the Existing Employment Land Supply

	No of Sites	% of Sites	Total Land (ha)
Poor	1	2%	2.56
Average	20	47%	95.67
Good	21	49%	192.07
Excellent	1	2%	0.97
Total	43	100%	291.27

Source: GVA Grimley, 2010/2010

- 4.16 As can be seen in Table 4.3 above, in terms of the sustainability assessment 49% (21 sites) were scored as good providing a total of 192.07ha of land. Just one site was scored as being excellent – The Justice Centre in Nuneaton town centre. A further 20 sites were scored as average and one site, Marston Jabbett, was scored as being poor in terms of sustainability.

ii) Proposed Employment Sites within Nuneaton and Bedworth

- 4.17 This definition includes allocations of employment land as identified in policies Emp1 – Emp5 of the current Nuneaton and Bedworth Local Plan, as well as employment land that was under construction at the time of the study and committed sites with planning permission (either outline or full). Information on these sites was supplied by Nuneaton and Bedworth Borough Council to GVA Grimley. A total of 36 sites, comprising 48.19ha were identified.
- 4.18 After an initial review of the data, a number of sites were recommended for removal, either due to them being already completed, or them being within centres and therefore will be incorporated into the Town Centres Capacity Study. The sites that were removed at this stage are detailed in Table 4.4 below.

Table 4.4 - Proposed Sites Removed from the Portfolio

GVA Ref	Name	Reason for Removal	Area (ha)
P 16	King Street, Bedworth	Included within Town Centres Capacity Study	0.12
P 17	Gallagher Business Park	Completed	0.51
P 25	Bermuda 1	Completed	0.85
P 29	A444 Griff Way	Alternative non-employment permission / development option	0.37
P 34	Corporation Street	Included within Town Centres Capacity Study	0.01
P 36	Camp Hill Urban Village Midland Quarry Tuttle Hill	Alternative non-employment permission / development option	1.7
Total			3.56

Source: GVA Grimley, 2010

- 4.19 As a result of these changes to the portfolio, the overall quantum of proposed employment land that was assessed was reduced to 44.63ha.

Quantitative Assessment

- 4.20 GVA Grimley surveyors have subsequently undertaken an independent assessment of each site, using the information supplied by the Client as a base, but excluding those sites listed in

Table 4.4 above. The assessments included a range of market, sustainability and physical criteria using a standard proforma to record details of each area. Details of the proforma can be found at Appendix E. It should be borne in mind that this analysis reflects existing baseline conditions for the sites assessed and does not take into account any proposed improvements / investment to any of these areas of proposed employment activity.

- 4.21 Using the scores from the proforma, we have been able to undertake some quantitative analysis of the scores, which is detailed below. A more qualitative assessment of the key locations within the District can be found in the Property Market Review (Section 3).

Market Assessment

- 4.22 Detailed site assessments can be seen at Appendix F. Here we have summarised the market based characteristics of the proposed employment land supply. The market assessment takes account of the following characteristics:

- Access;
- Prominence;
- Site Layout;
- Character of Area;
- Economic Constraints;
- Strategic Location; and
- Market Attractiveness.

- 4.23 The scores are then ranked into a number of categories which determine how well the site scored. Full details of this methodology are detailed at Appendix G. Table 4.5 below shows the results of this analysis.

Table 4.5 – Summary of Market Scores of the Proposed Employment Land Supply

	No of Sites	% of Sites	Total Land (ha)
Poor	0	0%	0.00
Average	2	7%	1.27
Good	21	70%	36.53
Excellent	7	23%	6.83
Total	30	100%	44.63

Source: GVA Grimley, 2010

- 4.24 As can be seen in Table 4.5 above, a total of 21 sites (70%) were scored as good quality in terms of their market attractiveness, accounting for around 82% of the total supply in land

terms. There were seven sites scored as excellent and two sites were scored as average. None of the sites were scored as being poor in terms of their market attractiveness. From our analysis it would appear that Nuneaton and Bedworth has a supply of potential employment land that would be relatively attractive to the market. The extensions to Bermuda Business Park (Paradise Farm) and Prologis Park were the highest scoring sites in terms of marketability.

Physical Assessment

4.25 Detailed site assessments can be seen at Appendix F. Here we have summarised the physical based characteristics of the proposed employment land supply. The physical assessment takes account of the following characteristics:

- Local Access; and
- Site Layout

4.26 The scores are then ranked into a number of categories which determine how well the site scored. Full details of this methodology are detailed at Appendix G. Table 4.6 below shows the results of this analysis.

Table 4.6 – Summary of Physical Scores of the Proposed Employment Land Supply

	No of Sites	% of Sites	Total Land (ha)
Poor	0	0%	0.00
Average	5	17%	17.88
Good	12	40%	14.24
Excellent	13	43%	12.51
Total	30	100%	44.63

Source: GVA Grimley, 2010/2010

4.27 As can be seen above in Table 4.6, 43% (13 sites) were scored as excellent, representing around 12.5ha of land. A further 40% (12 sites) were scored as being good, with the remaining 17% (5 sites) scored as being average in terms of physical characteristics. No sites were scored as being poor. According to our analysis, Nuneaton and Bedworth has a large supply of potential employment land that is scored as being good to excellent in terms of its physical characteristics. The sites that scored the highest in terms of the physical assessment were extensions to Bermuda (Paradise Farm) and the extensions to ProLogis Park and Gallagher's Business Park.

Sustainability Assessment

4.28 Detailed site assessments can be seen at Appendix F. Here we have summarised the sustainability based characteristics of the employment land supply. The sustainability assessment takes account of the following characteristics:

- Public Transport;
- Local Amenities; and
- Strategic Location.

4.29 The scores are then ranked into a number of categories which determine how well the site scored. Full details of this methodology are detailed at Appendix G. Table 4.7 below shows the results this analysis.

Table 4.7 – Summary of Sustainability Scores of the Proposed Employment Land Supply

	No of Sites	% of Sites	Total Land (ha)
Poor	1	3%	1.00
Average	2	7%	0.25
Good	27	90%	43.38
Excellent	0	0%	0.00
Total	30	100%	44.63

Source: GVA Grimley, 2010

4.30 As can be seen in Table 4.7 above, in terms of the sustainability assessment 90% (27 sites) were scored as good providing a total of 43ha of land. A further two sites were scored as being average, three sites were scored as average and two sites (both at Haunchwood Business Park) were scored as being poor.

Recommendations for a new Portfolio of Employment Land

4.31 The supply of employment land within Nuneaton and Bedworth has been assessed in terms of the existing portfolio of sites, and future supply which has the potential to come forward to meet future demand. This assessment has been undertaken both quantitatively and qualitatively, taking into account a range of planning, economic and property market influences. The Employment Land Review Guidance advises that recommendations are made to the local planning authority regarding the stock of employment land and its suitability for employment use in the future. These recommendations must take account of local planning influences, economic factors and market conditions.

Existing Supply

- 4.32 According to our quantitative assessments, the existing portfolio of employment land scores good to excellent, with the majority of existing sites being scored average or better. In terms of the overall score the best scoring existing employment areas are Prologis Park, Bermuda Industrial Estate 1, Justice Centre and Ashbrook Court, all of which were ranked as being excellent in at least two of our assessments. The future supply of employment land in the Borough was found to be of average to good quality, with just two sites (Judkins 2 and Haunchwood Business Park) receiving a poor ranking within our assessments.
- 4.33 In terms of recommending a new portfolio of employment land, it is necessary to take into account both the qualitative assessments contained within the property market review and stakeholder interviews and the quantitative assessments contained within this chapter. Existing areas of employment land that scored poorly in the quantitative assessment were King Edward Road, Anker Street, Midland Road, Hawkesbury Lock Industrial Centre, Hazell Way Industrial Estate, Blackhorse Road Industrial Estate, Blackhorse Road, Newtown Road, Aston Industrial Estate, Caldwell Road Industrial Estate, Tuttle Hill, Bath Road and Seymour Road. Taking each of these in turn:

King Edward Road

Figure 4.3 - Location of King Edward Road



Source: GVA Grimley, 2010

- 4.34 King Edward Road lies to the east of Nuneaton town centre and is surrounded by predominantly residential uses, including new properties that have been recently constructed to the south. The eastern boundary of the site is adjacent to the Nuneaton – Coventry railway line. The condition of the buildings and external environment are both considered to be poor and this, coupled with the relatively narrow access road and surrounding uses make this an unattractive site for prospective occupiers. Any expansion by the current occupiers is unlikely as this would impact on the surrounding residential properties, therefore we have taken the view that this site is likely to be redeveloped for alternative uses (non employment) over the course of the Plan period, and therefore for the purposes of this Study we have recommended that it is removed from the portfolio.

Anker Street

Figure 4.4 - Location of Anker Street

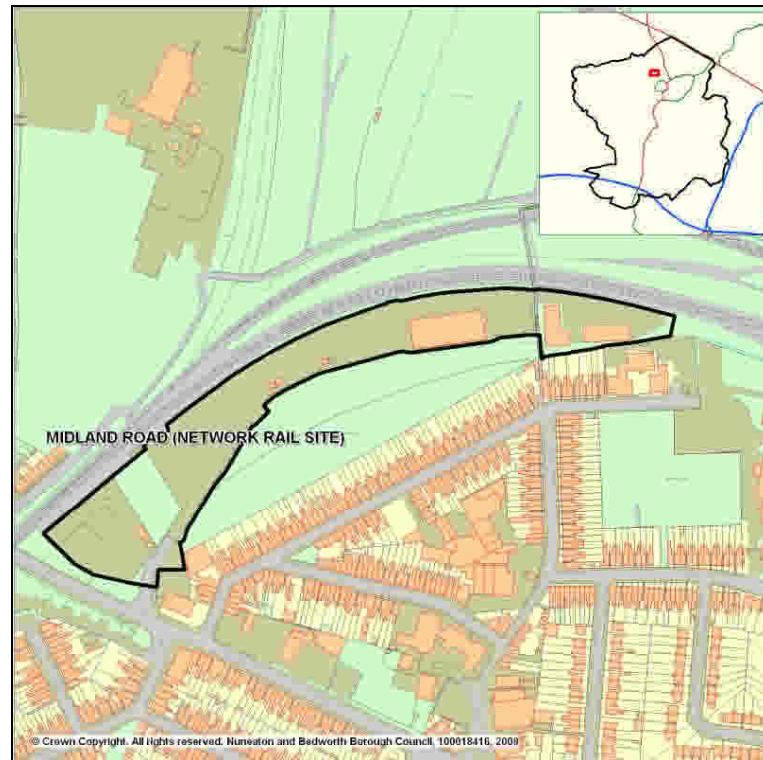


Source: GVA Grimley, 2010

- 4.35 Anker Street is located close to Nuneaton town centre and is surrounded by residential uses, including new properties that have been recently constructed to the north. Our assessment of this site and the issues arising is similar to those discussed in paragraph 4.34 above for King Edward Road, specifically the poor condition of buildings, external environment and limited room for expansion hence making the site unattractive to prospective occupiers. This site represents an opportunity for redevelopment, potentially as residential and therefore we have recommended that the site is removed from the employment land portfolio for the purposes of this study.

Midland Road

Figure 4.5 - Location of Midland Road

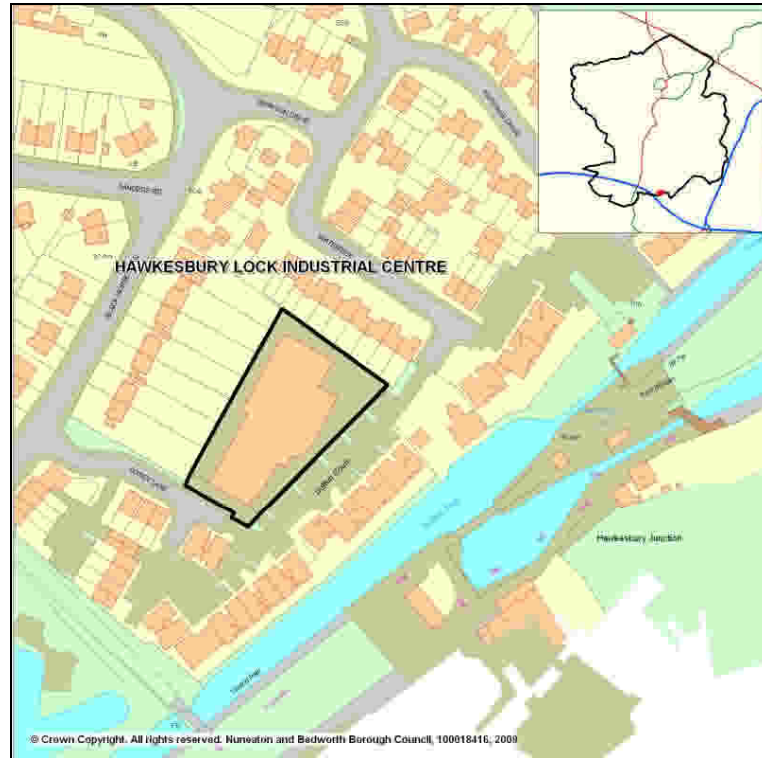


Source: GVA Grimley, 2010

- 4.36 The Midland Road site is located to the north west of Nuneaton town centre, adjacent to the railway line. This site is somewhat isolated from other employment uses, and the condition of the buildings has been noted as being particularly poor. The southern end of the site is occupied by a scrap metal firm who we understand are looking to relocate, whilst the north eastern part is occupied by Network Rail who are improving the railway line and therefore their presence is likely to be limited in the longer term. Given the size of the site (2.2ha), its location in close proximity to the town centre and the predominantly surrounding residential uses, we feel that this site would be a potential redevelopment site and therefore we have recommended it is removed from the portfolio for the purposes of this study.

Hawkesbury Lock Industrial Centre

Figure 4.6 - Location of Hawkesbury Lock Industrial Centre



Source: GVA Grimley, 2010

- 4.37 Hawkesbury Lock Industrial Centre is located off Coney Lane in the south east of the Borough. The condition of the buildings and external environment are generally average to poor, and access to this part of the Borough is noted as being difficult due to the traffic congestion that exists around Blackhorse Road. The site has become somewhat isolated from other employment uses as a result of the recent residential development that now completely surrounds the site, and issues relating to lack of room for expansion and impact on neighbouring uses will arise in the future. As a result, we have recommended that this site is removed from the portfolio for the purposes of this study.

Hazell Way Industrial Estate

Figure 4.7 - Location of Hazell Way Industrial Estate

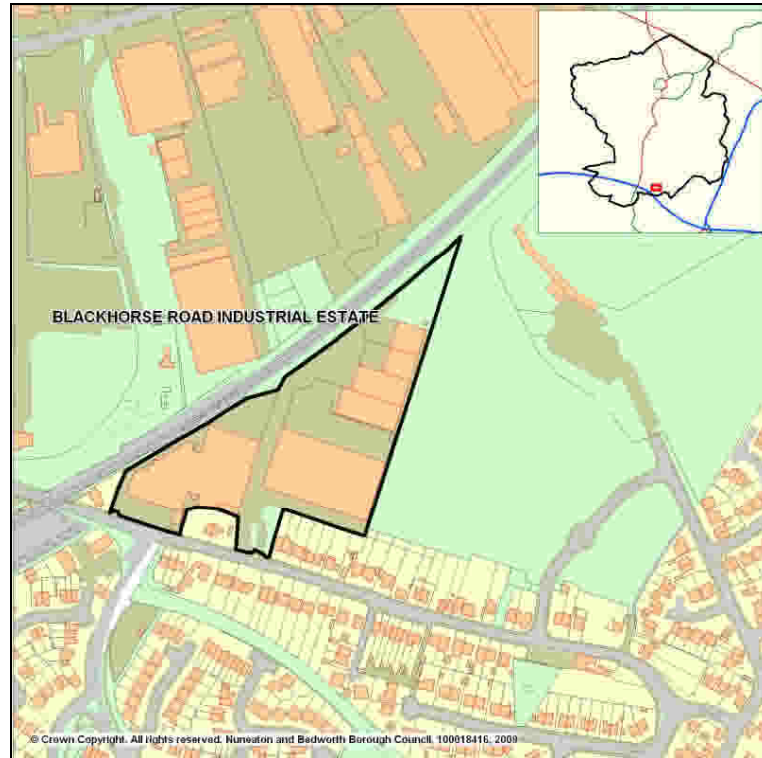


Source: GVA Grimley, 2010

- 4.38 Hazell Way is a relatively large area of employment located to the west of the A444, south west of Nuneaton town centre. The site has been assessed as having reasonable quality buildings and environment, however the access is poor, with the site being accessed through mainly residential areas and there is a significant level of vacancy within the site. This employment area is within a key growth corridor in the Borough and the recent residential developments to the north and south will limit the type and extent of industrial operations that could be developed in this area in the future. We would recommend that given the site's poor score within our assessment, the poor access and likelihood of further vacancy, that this site is removed from the portfolio for the purposes of this study.

Blackhorse Road Industrial Estate

Figure 4.8 - Location of Blackhorse Road Industrial Estate



Source: GVA Grimley, 2010

- 4.39 Blackhorse Road Industrial Estate is located to the south east of Bedworth town centre and is bounded by residential development to the south and the Nuneaton – Coventry railway line to the north. The poor quality of the buildings and external environment was noted in our assessments, which in turn impacts on the site’s attractiveness to future occupiers. The likelihood of further expansion in this location is limited due in part to the surrounding uses, but also the proximity of the railway line and the poor access via Blackhorse Road, which already suffers from heavy congestion. This site’s continued use employment therefore seems to be unlikely in the longer term, particularly with the pressure for additional brownfield housing sites, and we have therefore recommended that it is removed from the portfolio for the purposes of this study.

Blackhorse Road

Figure 4.9 - Location of Blackhorse Road



Source: GVA Grimley, 2010

- 4.40 Blackhorse Road is a small industrial area to the south east of Bedworth town centre. Our assessments of the site have shown it has a poor external environment and access, and buildings that are of average quality. To the south west of the site is a relatively new residential development, while to the north are older residential properties. The other uses surrounding the site are open space, including a children's play area. The future of this site in the longer term looks to be limited given the limited attractiveness and constraints with regard to expansion. We would therefore recommend that this site is removed from the portfolio as part of this study.

Newtown Road

Figure 4.10 - Location of Newtown Road



Source: GVA Grimley, 2010

- 4.41 Regalia House on Newtown Road is located a short distance west of Bedworth town centre and comprises a two and three storey office block and small industrial type units to the rear. Our assessments of the site highlighted the poor quality of the buildings and external environment, as well as the restricted access, which for larger vehicles would be problematic. The site is surrounded by residential uses on all sides, which coupled with the general poor state of repair of the buildings and exteriors, makes the site unattractive to prospective occupiers. The site is therefore likely to be redeveloped over the course of the Plan period, and therefore we would recommend that it is removed from the portfolio for the purposes of this study.

Aston Industrial Estate

- 4.42 Aston Industrial Estate is located to the north west of Nuneaton town centre, and takes up the majority of backland within the triangle formed by Jodrell Street, Toller Road and Aston Road. It is surrounded on all three sides by residential properties. Its location is shown in Figure 4.11 below.

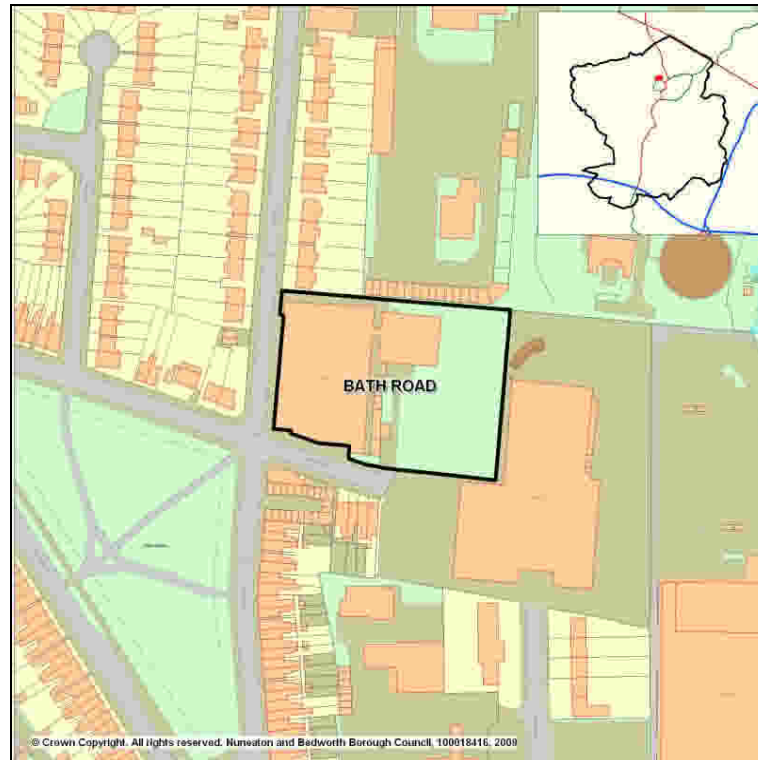
Figure 4.11 – Location of Aston Industrial Estate

Source: GVA Grimley, 2010

- 4.43 Our site assessments show that Aston Industrial Estate scores average marks overall across our three assessments, but has particularly poor scores relating to the quality of buildings and external environment, access (both locally and onto the wider strategic highway network) and its overall market attractiveness. Positive marks were given for the level of vacancy being very low, its proximity to other amenities (particularly those located in Nuneaton town centre, around ½ mile away) and the public transport links serving the site.
- 4.44 In our view, whilst the site is well used and well located having regard to supporting facilities, the buildings on this site are coming towards the end of their economic life with little investment having taken place in recent years. Furthermore the adjacent uses (predominantly residential) would make redevelopment of the site as employment prohibitive and potentially non cost effective. We would therefore recommend that this site is taken out of the employment land portfolio for the purposes of this study.

Bath Road

- 4.45 Bath Road is located approximately ¼ mile to the north of Nuneaton town centre and is bounded to the north, west and south by residential properties, to the north east by a sewage works and to the south east by a bus depot. Its location is shown in Figure 4.12 below.

Figure 4.12 – Location of Bath Road

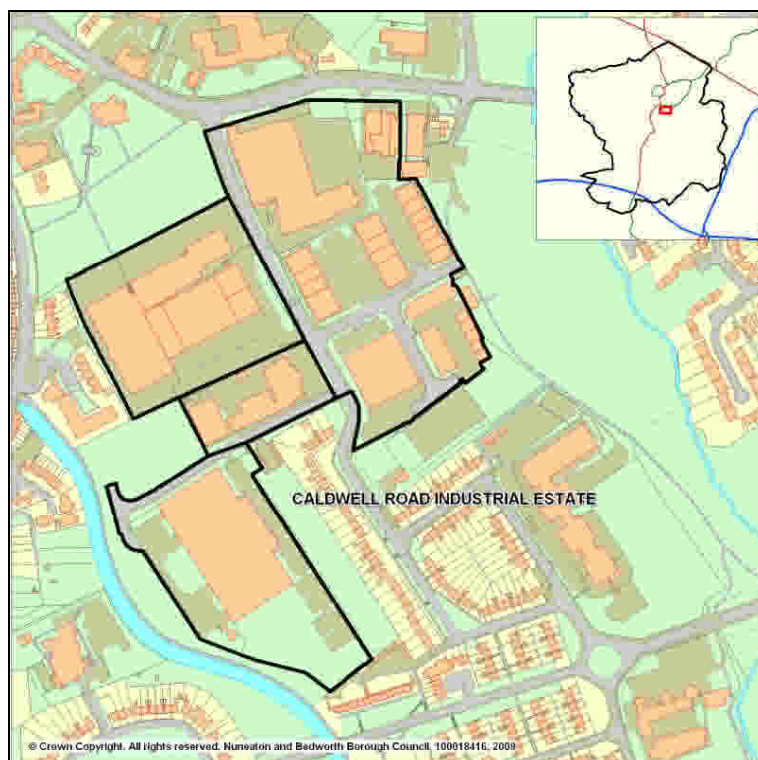
Source: GVA Grimley, 2010

- 4.46 Our site assessment of Bath Road shows that overall it scored average, with particularly good scores for the sustainability assessment, given its proximity to Nuneaton town centre and bus / train linkages. However its scores poorly on the physical and market assessment, with below average scores for the quality of the buildings and external environment, levels of vacancy, nature of tenants, access locally and its overall attractiveness to the market.
- 4.47 In our view this site is poorly used, possibly due to the quality of the buildings in situ, and coming towards the end of its economic life. Redevelopment as employment could be a possibility, given the surrounding uses particularly to the east, though this would be dependent on the value of the land as employment versus cost of redevelopment, and any remediation measures that may need to be undertaken, and therefore a mix of uses may be more appropriate. We would suggest that further work would need to be undertaken to explore the redevelopment potential of this site, including an appropriate mix of uses, and therefore we would recommend that it remains in the employment land portfolio for the purposes of this study.

Caldwell Road Industrial Estate

- 4.48 Caldwell Road Industrial Estate is located off the A4254 to the south of Nuneaton town centre. This area comprises some new employment, such as Shepperton Business Park, older areas of employment along Caldwell Road and residential properties. Although only one part of the site scored poorly in our quantitative assessment, here we discuss the future potential of the wider site. The location of this site is shown in Figure 4.13 below.

Figure 4.13 – Location of Caldwell Road Industrial Estate



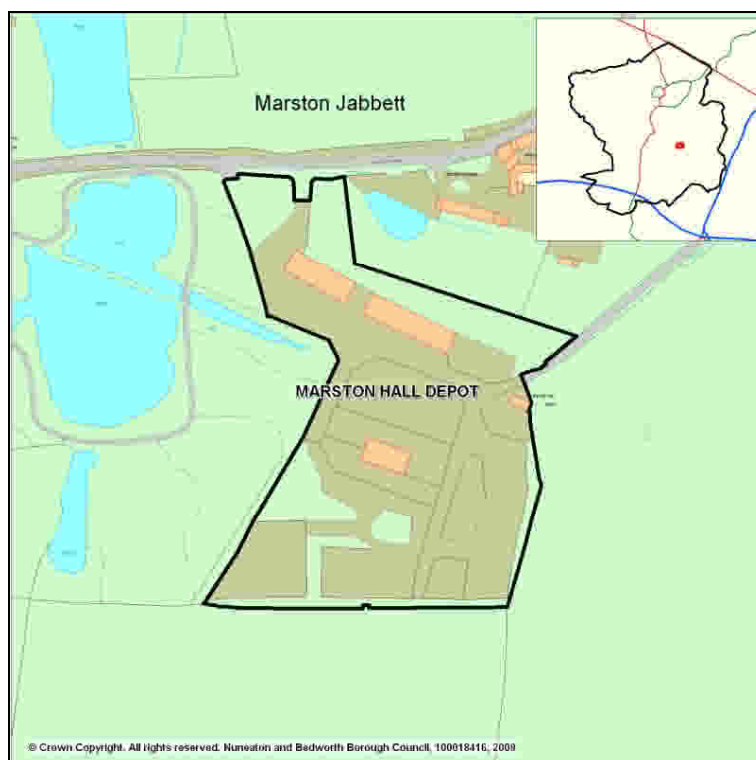
Source: GVA Grimley, 2010

- 4.49 Our assessment of Caldwell Road shows that it scores average overall, but has poor marks relating to the quality of buildings and external environment, the nature of existing tenants, local amenities and overall attractiveness to the market.
- 4.50 This area appears to be one of change with some new build commercial alongside older residential properties. This site offers an excellent opportunity for redevelopment as employment only, together with vacant land to the west (subject to issues of ownership being resolved) and could provide an ideal location for smaller “start-up” units, to enable the formation of entrepreneurial businesses within Nuneaton and Bedworth. Therefore we would recommend that this site is kept in the portfolio, with a view to being redeveloped during the Plan period.

Marston Jabbett

- 4.51 The Marston Jabbett site is located approximately four miles to the south of Nuneaton town centre and around two miles north east of Bedworth. It lies between the built up areas of Griff and Bulkington. The site comprises a number of small, modern purpose built units and areas of open storage. Its location is shown in Figure 4.14 below.

Figure 4.14 – Location of Marston Hall Depot



Source: GVA Grimley, 2010

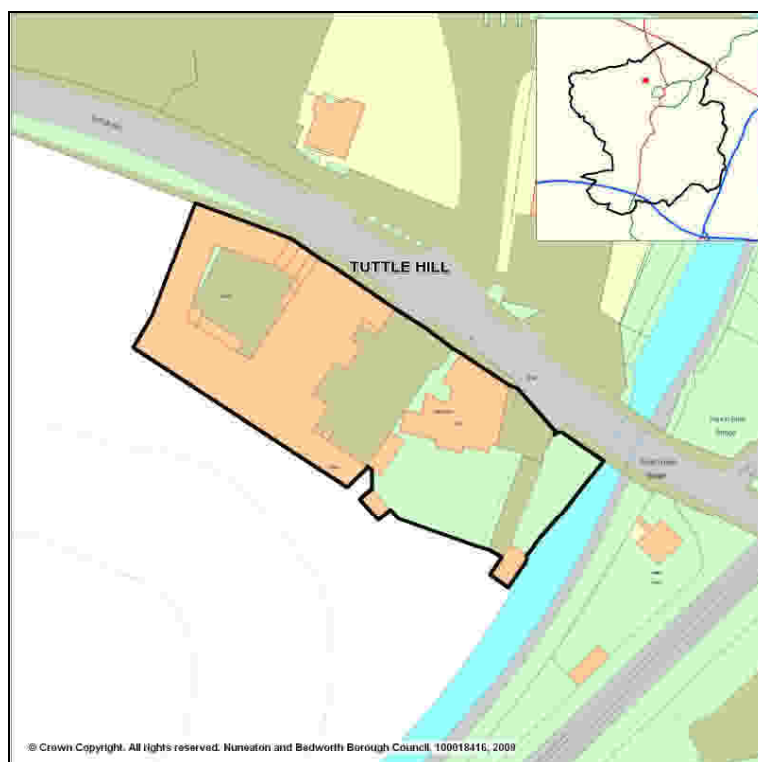
- 4.52 Our assessment of the Marston Hall Depot site shows that it scores well in terms of building age and quality. This area has number of modern, purpose built units, which appear to be well used. The poor marks relate to the external environment, which is currently being used for open storage, the lack of amenities in the local area and access to the site via modes of public transport, which was considered to be poor.
- 4.53 In light of our assessment, it is apparent this site is undergoing some redevelopment, and therefore some of the poor scores it received as part of this Study should be improved. There are issues relating to its location, and access to and from the site, which does not promote sustainable travel, and there would be a reliance on the private car for people travelling to and from Marston Jabbett. However, we feel that these issues may be resolved with improved

public transport measures in the area, therefore, we would recommend that this site is retained in the employment land portfolio.

Tuttle Hill

- 4.54 Tuttle Hill is located to the north west of Nuneaton town centre, and is located within the Camp Hill Urban Village Area. Its location is shown in Figure 4.15 below.

Figure 4.15 – Location of Tuttle Hill



Source: GVA Grimley, 2010

- 4.55 Our assessment of Tuttle Hill shows it to be one of the poorest scoring sites in Nuneaton and Bedworth, with poor scores relating to the quality, age and external environment of the buildings, the nature of tenants, proximity to local amenities and its overall market attractiveness.
- 4.56 Given that this site is within the boundary of the Camp Hill Urban Village (Phase 4 – Midland Quarry) (reference Map P36 of Appendix A), and that an allowance has been made for the development of around 5,200 sq m (56,000 sq ft) of B1 industrial development within the proposed sites, we would recommend that the Tuttle Hill site is removed from the portfolio to avoid any double counting.

Seymour Road

Figure 4.16 - Location of Seymour Road



Source: GVA Grimley, 2010

- 4.57 Seymour Road lies to the south east of Nuneaton town centre and comprises three separate areas, interspersed with residential uses and bordered to the south and east by the River Anker. The access to the site is poor, with the only way in and out of the site being through areas of existing residential uses. In addition, there are issues relating to the poor quality of some buildings, the general appearance of the environment and the relatively poor provision of local amenities and public transport. We understand that the current owners and occupiers have grown beyond the extent of the site, and that due to constraints relating to extending the site this is making working conditions difficult. We would therefore conclude that this site is likely to be lost from the portfolio over the short to medium term, with redevelopment for residential a possibility, given the existing surrounding uses, although the risk of flooding would need to be taken into account and mitigated.

Summary

- 4.58 In total we have identified that around 17.85ha of employment land to be removed from the portfolio, shown in Table 4.8 below, which will have an effect in the short – medium term with regard to relocations of the companies currently located upon those sites. We have identified

that on these sites there is a significant level of occupation and therefore we would propose to deal with these relocations by adding this additional demand to the demand forecasts, which are explained in detail in Section 5.

Table 4.8 - Sites Removed from the Existing Employment Land Portfolio

GVA Ref	Name of Site	Area (ha)	WMRSS Typology
E12	Seymour Road	1.06	Good Quality
E23	Blackhorse Road Industrial Estate	2.24	Good Quality
E26	Blackhorse Road	0.23	Other
E27	Hawkesbury Lock Industrial Centre	0.28	Other
E3	Midland Road Rail Network	2.22	Good Quality
E33	Hazell Way Industrial Estate	8.60	Good Quality
E36	King Edward Road	0.73	Good Quality
E38	Anker Street	0.41	Good Quality
E39	Newtown Road, Bedworth	0.39	Other
E4	Aston Industrial Estate	0.58	Good Quality
E43	Tuttle Hill	0.54	Good Quality
E5	Bath Road	0.57	Good Quality
Total		17.85	

4.59 Table 4.9 below details the revised portfolio of employment land taking these recommendations into account. This shows that the amount of existing employment land is expected to reduce to around 272.63ha over the Plan period, creating a further 17.85ha of employment land demand as a result.

Table 4.9 - Revised Portfolio of Existing Employment Land

GVA Ref	Name	Area (ha)	WMRSS Typology
E1	Pool Road Business Centre	0.26	Other
E2	Pool Road Industrial Estate	7.40	Good Quality
E6	St Mary's Road	1.76	Good Quality
E7	Weddington Terrace Industrial Estate	3.03	Good Quality
E8	Oaston Road	0.90	Good Quality
E9	Whitacre Road	9.39	Good Quality
E10	Attleborough Fields	31.66	Sub-regional
E11	Hemdale Business Park	5.06	Good Quality
E13	Trident Business Park 1	1.38	Good Quality
E14	Trident Business Park 2	0.96	Good Quality
E15	Caldwell Road Industrial Estate 1	4.70	Good Quality
E16	Caldwell Road Industrial Estate 2	2.52	Good Quality
E18	Shepperton / Centrovell	2.66	Good Quality
E19	Marston Jabbett	2.56	Good Quality
E20	Bayton Road Industrial Estate 1	23.86	Sub-regional
E21	Bayton Road Industrial Estate 2	46.44	Sub-regional
E22	Grovelands Industrial Estate	7.22	Good Quality
E24	School Lane	1.08	Good Quality
E25	The Moorings Business Park	2.99	Good Quality
E28	Gallagher Business Park	9.88	Good Quality
E29	Prologis Park	16.16	Sub-regional
E30	Bermuda Industrial Estate 1	53.51	Sub-regional
E31	Eliot Park	5.17	Good Quality
E32	St Georges Way (Bermuda Industrial Estate)	18.01	Sub-regional
E34	Tenlons Road Industrial Estate	4.14	Good Quality
E35	Haunchwood	6.09	Good Quality
E37	Justice Centre	0.97	Good Quality
E40	Heritage Business Centre	0.23	Other
E41	Weddington Road	0.68	Good Quality
E42	Ashbrook Court, Prologis Park	1.96	Good Quality
Total		272.63	

Source: GVA Grimley, 2010

Proposed Sites

- 4.60 The portfolio of proposed sites comprises sites with planning permission and allocations from the 2006 Local Plan that have not yet been implemented. We have reviewed the proposed sites in terms of their market, physical and sustainability characteristics starting at paragraph 4.17. The assessments show that the majority of proposed employment sites are of average to good quality. It is noticeable from reviewing employment land monitoring reports that a number of these sites have been allocated within the Local Plan (most recent and previous

-
- versions) for some time. Such examples include sites at Griff Clara and Bermuda Business Park.
- 4.61 In relation to the Judkins Site at Midland Quarry Tuttle Hill (reference P1), we understand that the owners, Waste Recycling Group, commissioned a study in July 2009 to look at preparing a Masterplan and viability analysis for the entire Judkins site, which extends to some 190ha. The outcomes of that study highlighted that the most practical and deliverable solution for the existing site would be a mixed use scheme with approximately 15ha of employment land and 3,000 new homes. We have included an area of around 15ha in our site to reflect this position, however whether the site comes forward during the Plan period will be dependent on the composition of land uses within the Masterplan once it has been finalised. This could have an important bearing on the availability of employment land in the Borough, as if the site does not come forward, it would mean that the overall supply would be reduced by almost a half.
- 4.62 In order to provide a degree of realism to the portfolio, especially regarding the probability of the sites within it being developed, we have chosen to remove some of the proposed sites, based on them being classed as a as being a “longstanding site”. After consultation with the local planning authority the definition of these longstanding sites was “sites that have had less than 25% of their total area developed for employment uses despite being allocated for some time (at least one Plan period)”.
- 4.63 The reason for removing these sites from the analysis was that it gives the portfolio much more reliability by reflecting the fact that even though some sites have been allocated for some time (up to 10 years), this doesn’t necessarily mean that they will come forward for employment development over the course of the next 20 years or so. Sites that have been classed as being longstanding by the local authority may have some underlying problem with bringing them forward, such as economic or physical constraints that has prevented them from being developed in the past.
- 4.64 The sites that have been removed from the capacity assessment are shown in Table 4.10 below.

Table 4.10 - Longstanding Sites Removed from the Employment Land Portfolio

GVA Ref	Name	Area (ha)
P 5	Griff Clara	0.78
P 6	Bermuda Park	0.67
P 7	Griff Clara	4.31
P 8	Colliery Lane, Bayton Road Industrial Estate	0.59
Total		6.35

Source: GVA Grimley, 2010

4.65 The sites that will remain in the future employment land portfolio are shown in Table 4.11 below.

Table 4.11 – Revised Portfolio of Proposed Employment Sites

P 1	Midland Quarry Tuttle Hill (North Of)	15.61
P 2	Clarkson Engineering	0.27
P 3	Paradise Farm	1.6
P 4	Griff Clara	4.66
P 9	Camp Hill Urban Village - Midland Quarry	2.09
P 10	Haunchwood Park Drive Nuneaton	0.2
P 11	Prologis Park	3.99
P 12	Bermuda Park	0.51
P 13	Hemdale Business Park	0.18
P 14	Hemdale	0.14
P 15	Bermuda Park	1.3
P 18	Pool Road Industrial Estate	0.2
P 19	Shepperton Business Park	0.67
P 20	Bayton Road Industrial Estate	0.21
P 21	Camp Hill Urban Village	1.97
P 22	Marston Jabbett	1
P 23	Whitacre Road Industrial Estate	0.79
P 24	Prologis Park	0.49
P 26	Hemdale Business Park Nuneaton	0.51
P 27	Bermuda 1	0.88
P 28	Paradise Farm	0.42
P 30	Bayton Road Industrial Estate	0.11
P 31	Bayton Road Industrial Estate	0.09
P 32	Bayton Road Industrial Estate	0.13
P 33	Haunchwood Park	0.05
P 35	Whitacre Industrial Estate	0.21
Total		38.28

Source: GVA Grimley, 2010

Capacity Assessment

- 4.66 In order to determine the capacity of sites to accommodate employment floorspace, we have undertaken an assessment of their suitability for different land uses and the amount of employment floorspace that could be accommodated within them. We have undertaken the capacity assessment using our revised portfolio of land, as detailed above, in order to be cautious in determining the land supply and provide a realistic view of the amount of employment land that is likely to come forward over the Plan period.
- 4.67 In order to assess the types of land uses that could be accommodated within each of the proposed employment sites in the portfolio of land, we have used a number of existing sources of information. Where a site has an existing planning permission in place for employment we have assumed that the site is suitable for the uses listed in the permission. Where sites do not have planning permission in place, we have used information from the Local Plan (in terms of allocated sites) and our professional judgement, based on the size, location, condition and adjacent land uses to guide the typology of each site. Where a site is suitable for more than one use, we have assumed an equal split of land uses across the site, as detailed in Table 4.12 below.

Table 4.12 - Assumptions Used in Capacity Assessment

Typology	Split of Land Uses		
	B1	B2	B8
B1	100%	0%	0%
B1/B2	50%	50%	0%
B1/B2/B8	33%	33%	33%
B2	0%	100%	0%
B2/B8	0%	50%	50%
B8	0%	0%	100%

Source: GVA Grimley, 2010

- 4.68 Using the assumptions shown in Table 4.12 above we have determined the capacity of each proposed employment site in the portfolio. A summary of the capacity assessment is shown in Table 4.13 below. A more detailed breakdown, on a site by site basis is shown at Appendix H.

Table 4.13 - Summary of Capacity Assessment

Typology	No. of Sites	Capacity (ha)			Total
		B1	B2	B8	
B1	4	4.66	0.00	0.00	4.66
B1/B2	0	0.00	0.00	0.00	0.00
B1/B2/B8	4	6.15	6.15	6.15	18.46
B2	7	0.00	1.49	0.00	1.49
B2/B8	12	0.00	7.13	7.13	14.26
B8	0	0.00	0.00	0.00	0.00
Total	27	10.81	14.77	13.28	38.87

Source: GVA Grimley, 2010

- 4.69 The capacity assessment work has shown that Nuneaton and Bedworth has a total capacity of around 38.87ha (excluding space within the centres, completions and longstanding sites), and that this is split 10.81ha for B1 uses, 14.77ha for B2 and 13.28ha for B8. It has been assumed that capacity within these sites would be split equally between the different land use classes, however it may be possible to shift some of this supply between land use classes in order to accommodate the predicted demand in the most economical fashion.
- 4.70 The next section of this report focuses on the economic projections and scenarios for predicting demand for employment land up to 2026.

5. ECONOMIC PROJECTIONS AND SCENARIOS

Economic Projections and Scenarios

- 5.1 This section sets out the methodology underpinning the preparation of the employment demand forecasting component of the study and the resulting forecasts of floorspace and land requirements. It provides a clear audit trail of the methods, assumptions and stages of work. This includes the use of employment forecasts and the development of alternative forecasting scenarios, their translation into floorspace forecasts and subsequently into estimates of future land requirements.
- 5.2 One of the principal tasks has been to provide forecasts of employment demand by linking the property and economic analysis. This employment land study addresses the area within Nuneaton and Bedworth Borough Council's jurisdiction and there has been a considerable amount of work in identifying priority sectors within the Nuneaton and Bedworth economy, both now and in the future. Furthermore, an analysis was carried out to determine the most appropriate sectoral groupings for the local economy, which is sufficiently robust as a basis for the economic forecasting of future floorspace needs and their use in the spatial modelling of employment land scenarios.
- 5.3 The employment land projections produced in this study were based on economic projections produced by the Cambridge Econometrics (CE) Local Economy Forecasting Model (LEFM), which provides projections at the local authority level. With regard to translating employment forecasts into floorspace and land use classes/property types, we have noted that the DCLG Guidance acknowledges this to be "difficult and to some extent a matter of professional judgement." This is best achieved by grouping SIC data into around 25 sectoral groupings appropriate for the study area and the employment property product types available and is discussed in greater detail below.

Approach

- 5.4 Based on the principles above, the methodology for the employment land forecasts is set out in five steps:
- Source economic/employment projections;
 - Formulate appropriate alternative scenarios;
 - Create appropriate sector groupings and match to land use class categories;
 - Create worker density assumptions for converting employment to floorspace and prepare floorspace requirement forecasts;
 - Convert floorspace to land estimates and forecast land requirements.
- 5.5 The sources, assumptions and analysis made in each step are set out in the following five sections and a series of Appendices are attached setting out the detailed results of the key steps.

Step 1: Source Employment Projections

- 5.6 The baseline employment projections used in this study utilised the CE LEFM model which aggregates 2-digit SIC activity groupings into 41 industrial sectors, as shown in Table 5.1 below. The projections are sufficiently disaggregated to use as a basis for employment land forecasting and include historical data from 1981 to 2007 with projections from 2008 to 2026 for Nuneaton and Bedworth Borough. They represent the results of model-based analysis, focusing on the future performance of the existing industrial structure in Nuneaton and Bedworth, and have not been refined in light of any qualitative information, legislative changes or other 'soft' information.

Table 5.1 – Cambridge Econometrics’ Industries in terms of the 2003 Standard Industrial Classification

Industry	SIC2003 definition
1 Agriculture etc	01, 02, 05
2 Coal	10
3 Oil & Gas etc	11, 12
4 Other Mining	13, 14
5 Food, Drink & Tobacco	15, 16
6 Textiles, Clothing & Leather	17, 18, 19
7 Wood & Paper	20, 21
8 Printing & Publishing	22
9 Manufactured Fuels	23
10 Pharmaceuticals	24.4
11 Chemicals nes	24 (ex24.4)
12 Rubber & Plastics	25
13 Non-Metallic Mineral Products	26
14 Basic Metals	27
15 Metal Goods	28
16 Mechanical Engineering	29
17 Electronics	30, 32
18 Electrical Engineering & Instruments	31, 33
19 Motor Vehicles	34
20 Other Transport Equipment	35
21 Manufacturing nes	36, 37
22 Electricity	40.1
23 Gas Supply	40.2, 40.3
24 Water Supply	41
25 Construction	45
26 Distribution	50, 51
27 Retailing	52
28 Hotels & Catering	55
29 Land Transport etc	60, 63
30 Water Transport	61
31 Air Transport	62
32 Communications	64
33 Banking & Finance	65, 67
34 Insurance	66
35 Computing Services	72
36 Professional Services	70, 71, 73, 74.1-74.4
37 Other Business Services	74.5-74.8
38 Public Administration & Defence	75
39 Education	80
40 Health & Social Work	85
41 Miscellaneous Services	90 - 99
42 Unallocated	

Source: Cambridge Econometrics, 2009

Step 2: Formulate Appropriate Alternative Scenarios

- 5.7 This sub-section outlines the methodology used to formulate the alternative scenarios for economic growth within Nuneaton and Bedworth. They are based on baseline data for Nuneaton and Bedworth Borough, regional and local planning policy, past trends and economic aspirations.

Baseline

- 5.8 It was decided, in consultation with the client group, that the CE reference-case employment projections discussed above would form the baseline projections for this study, whilst

alternative economic scenarios would also be formulated to take account of recent economic trends, local economic development aspirations and policies and the impact of proposed housing growth in the district – issues which are not reflected in the LEFM projections. The baseline scenario uses the projected employment growth rates produced for Nuneaton and Bedworth Borough by the CE LEFM model and applies these to historic employment data sourced from the Annual Business Inquiry (ABI) for each sector in the Borough. In each scenario the base year is 2007 as this is the most recent year for which historic ABI employment data is available. Each scenario is therefore based on the same historic ABI data, disaggregated between 54 sectors (based on 2 digit SIC data), and includes projections from 2008 to 2026.

Past Trends Scenario

- 5.9 The 'Past Trends' Scenario is based on an analysis of recent past economic trends to set overall employment growth targets for 2026. The Scenario projects employment growth, using trends in ABI employment data for Nuneaton and Bedworth from 1998 to 2007, without reference to either RSS or local economic development policies. The analysis indicates that the Nuneaton and Bedworth economy has performed better than the LEFM forecasts project. Total employment in Nuneaton and Bedworth increased from 36,318 jobs in 1998 to 38,429 jobs in 2007 according to ABI data. This represents total employment growth of 0.6% per annum over the nine year period compared with the more conservative LEFM projections which suggest employment in 2026 will be similar to current (2007) levels.
- 5.10 There are clearly uncertainties whether this recent level of growth will be sustained in the period to 2026, particularly when considering the likely impact of the current economic downturn, as well as projecting over almost 20 years on the basis of past performance during a relatively short nine year period. However, ABI data suggests that employment in Nuneaton and Bedworth had already fallen by 5% between 2006 to 2007 as the economic downturn started to impact on the local economy. This recent decline has effectively reduced the past trends growth rate from an average of 1.3% per annum between 1998 and 2006, to 0.6% per annum between 1998 and 2007. It was therefore decided that for scenario building and testing purposes it would be sensible and realistic to examine the impact of assuming that employment would continue to grow at this historic rate of 0.6% per annum during the period from 2008 to 2026.
- 5.11 The analysis determined that it was unreliable to use this approach to project employment in each individual sector in Nuneaton and Bedworth because large fluctuations in smaller sectors at district level predict irrationally high growth rates and the projection is based on a

relatively short period with volatile changes in employment in some sectors. Therefore, the past trend forecasts are based on an analysis of average annual trends, using a combination of percentage and absolute changes, over the period 1998 to 2007, as explained below.

Primary and Manufacturing Sectors

- 5.12 National and regional trends show that Primary and Manufacturing sectors are declining consistently across most individual sub-sectors. This is also the case in Nuneaton and Bedworth, where employment in most manufacturing sectors has fallen significantly between 1998 and 2007 – by more than 10% per annum in many sectors. However there are also some Manufacturing sectors that have experienced employment growth between 1998 and 2007, according to ABI data. These include the manufacture of food and beverages, manufacture of wood and wood products, and the manufacture of other machinery (mechanical engineering).
- 5.13 These large positive and negative growth rates are partly due to the relatively small employment base within these sectors, while projecting such rates to 2026 can generate unrealistic employment totals. It was therefore decided that the manufacturing trends would be constrained by dividing the average annual ‘percentage’ trend by four and applying a ‘quarter’ trend. The ‘quarter’ percentage trend has been applied to all manufacturing sectors except for the manufacture of other transport equipment (a relatively large sector, which already had a ‘more realistic’, small negative growth trend) and any manufacturing sectors with very low or zero employment in 2007 (where employment has been assumed to remain stable to 2026).

Service Sectors

- 5.14 The service sectors in Nuneaton and Bedworth have experienced significant employment growth over the period 1998 to 2007, increasing at an average of 2.7% per annum. However, the past performance of individual service sectors has been highly variable. For example, employment in financial services has declined over the period, while the professional, business, transport and communications, distribution and ‘other’ services sectors have been driving this strong growth trend. The highly variable growth rates are also common amongst the smaller service sectors in Nuneaton and Bedworth, where a relatively small change in the number of people employed can represent a significant change in percentage terms, which can forecast exponential employment growth when projecting to 2026. Therefore, the past trends of many of the service sectors generate exceptionally high growth rates which cannot be sustained in the long-term.

5.15 For each service sector, with an unrealistic or unsustainable rate of projected employment growth, the average annual percentage growth rate from 1998 to 2007 was replaced with a more appropriate projection for the sector concerned, based on either:

- Quarter or half trend of the average annual ‘percentage’ growth rate;
- Quarter or half trend of the average annual ‘absolute’ change.

5.16 In most cases, the past trends needed to be restricted to provide more realistic projections. However, in the computer services and research and development sectors, the past trends were considered ‘unrealistic’ for being too conservative. It was therefore decided that for these two sectors, the past trend would be doubled and then applied to provide projections to 2026.

5.17 The rates were selected and applied such that total employment in Nuneaton and Bedworth is projected to grow at the historic average annual percentage growth rate of 0.6% per annum. The chosen methodology for each relevant service sector is shown in Table 5.2 below.

Table 5.2 – Selection of Appropriate Past Trends Projections for Service Sectors

Industry	Chosen ‘Past Trends’ Methodology (based on 1998-2007 ABI data)	Applied growth or change per annum
50 : Sale and repair of motor vehicles & fuel	Quarter average annual absolute change	+7.8 jobs p.a.
51 : Wholesale trade	Quarter average annual absolute change	+16.5 jobs p.a.
52 : Retail trade	Half average annual percentage growth	+0.4% p.a.
55 : Hotels & restaurants	Half average annual percentage growth	-0.3% p.a.
60 : Land Transport	Quarter average annual absolute change	+7.6 jobs p.a.
63 : Supporting transport activities	Quarter average annual absolute change	+13.2 jobs p.a.
64 : Post & telecommunications	Quarter average annual absolute change	+16.3 jobs p.a.
65 : Financial intermediation	Quarter average annual percentage growth	-0.8% p.a.
66 : Insurance & pension funding	Quarter average annual percentage growth	-2.1% p.a.
67 : Auxiliary financial activities	Quarter average annual percentage growth	-2.1% p.a.
70 : Real estate activities	Half average annual percentage growth	+1.5% p.a.
71 : Renting of machinery & equipment	Quarter average annual percentage growth	+0.7% p.a.
72 : Computer & related activities	2 x average annual percentage change	+0.8% p.a.
73 : Research & Development	2 x average annual percentage change	+21.4% p.a.
74 : Other business activities	Quarter average annual absolute change	+72.8 jobs p.a.
80 : Education	Half average annual percentage growth	+1.0% p.a.
85 : Health & social work	Half average annual absolute change	+72.4 jobs p.a.
90 : Sewage & refuse disposal	Quarter average annual percentage growth	+0.9% p.a.
91 : Activities of membership organisations	Quarter average annual percentage growth	-0.8% p.a.
92 : Recreational, cultural & sporting activities	Quarter average annual percentage growth	+0.9% p.a.
93 : Other service activities	Quarter average annual percentage growth	+1.3% p.a.

Source: GHK analysis, 2009

RSS Based Scenarios

- 5.18 The Regional Spatial Strategy (RSS) for the West Midlands underpins and guides the level of new housing and the development of the economy within the Region. Determining the relationship between the predicted growth of the local population (through housing growth) and future levels of employment is essential in predicting the quantity, type and location of new employment land.
- 5.19 The Phase 2 Revision Panel Report (September 2009) identifies an average growth of around 550 new homes per year for the period 2006 to 2026, thereby outlining a total growth of 11,000 new homes within Nuneaton and Bedworth Borough. We have therefore modelled housing growth using the target of 11,000 new homes for Nuneaton and Bedworth by 2026 as part of our RSS Based Scenario.
- 5.20 The latest revision also proposes a further 3,500 additional homes adjacent to the boundary with Coventry in the south of the Borough, which are included as part of the allocation for Coventry. We have included this figure to generate a higher housing projection of 14,500 new homes by 2026 as an alternative RSS-based scenario.
- 5.21 These two alternative options for new dwellings in Nuneaton and Bedworth form the basis of two alternative 'policy-on' scenarios for this study, where Scenario A-1 is based on an additional 11,000 new dwellings in the Borough between 2006 and 2026, and Scenario A-2 is based on an additional 14,500 new dwellings. The process of converting the projected number of additional dwellings into employment projections is discussed below and then presented in Table 5.3.
- 5.22 Since the employment projections are based on actual data to 2007 and projections to 2026, it is necessary to ensure the dwellings projections adopt an equivalent base year. The above target figures must therefore take account of any dwelling completions in 2006/07 in order to calculate the appropriate number of additional dwellings projected between 2007 to 2026. The 2006/07 Annual Monitoring Report states that there were 308 net residential completions in Nuneaton and Bedworth in 2006/07. Subtracting this figure suggests that the adjusted targets for new dwellings in the Borough between 2007 and 2026 should be 10,692 for Scenario A-1 and 14,192 for Scenario A-2.
- 5.23 This increase in dwellings from 2007 to 2026 implies an increase in in-migrant population – assumed at an average rate of 2.4 persons per dwelling based on 2001 Census data for the Borough. This estimates additional populations of 25,661 (Scenario A-1) and 34,061 (Scenario A-2).

- 5.24 The Warwickshire Observatory has provided latest estimates of working age population as a percentage of the total Nuneaton and Bedworth population in 2026 (54.3%). It was not possible to source projected estimates of the economically active population in Nuneaton and Bedworth in 2026. Instead, the latest available estimate of the economically active population as a percentage of working age population (82.8% for the period January to December 2008, according to the ONS Annual Population Survey) has been assumed for 2026. These estimates have been applied to the population estimates to provide estimates of the working age and economically active populations in 2026 of 13,934 and 11,537 respectively for Scenario A-1, and 18,495 and 15,314 respectively for Scenario A-2.
- 5.25 The forecasts of additional economically active people in 2026 have been used to develop the two alternative scenarios for the additional number of jobs to be generated in Nuneaton and Bedworth between 2007 and 2026. These scenarios set targets for total additional jobs in the Borough in 2026 by maintaining the existing level of “Job Balance” (70.7% – based on 2001 Census data). Job Balance is defined as the number of jobs in Nuneaton and Bedworth divided by the number of economically active residents. Therefore this Job Balance Ratio suggests there are considerably more people commuting out of the Borough for employment than there are commuting in. The same ratio, calculated using ABI employment data and the ONS Annual Population Survey for 2007, suggests a lower Job Balance Ratio of 60%. However, the assumption based on Census data is considered more robust and has been used for this study. Furthermore, it is an aspiration of the Borough Council to provide a greater number and range of jobs within the Borough and thereby reduce the current levels of out-commuting. Applying the Job Balance ratio of 70.7% provides jobs targets for 2026 of 8,157 (Scenario A-1) and 10,827 (Scenario A-2), as presented in Table 5.3.

Table 5.3 – Conversion of RSS Housing Targets to Employment Growth

	Scenario A-1	Scenario A-2
Potential New Dwellings (2006-2026)	11,000	14,500
Dwelling Completions (2006/07)	308	308
Potential New Dwellings (2007-2026)	10,692	14,192
Implied Population Increase (2007-2026)	25,661	34,061
Implied Increase in Working Age Population (2007-2026)	13,934	18,495
Implied Increase in Economically Active (2007-2026)	11,537	15,314
Total Additional Jobs (2007-2026)	8,157	10,827

Sources: West Midlands RSS (Phase 2 Revision Panel Report), 2009; Warwickshire Observatory; Census data; and GHK analysis, 2009

- 5.26 Whilst these scenarios provide an overall reference point for job growth to 2026, they do not provide any estimate of how the sectoral structure of the economy could be expected to change during this period. For the baseline scenario the projected LEFM sectoral structure is

-
- adopted but, as the analysis of past sectoral trends indicates, the local Nuneaton and Bedworth economy has experienced growth in excess of that projected by the LEFM model.
- 5.27 The future structure of the economy can also be expected to reflect the significant increase in dwellings and resident population expected by 2026. It was therefore recommended that the projected distribution of the target jobs for Nuneaton and Bedworth between sectors should be based on the impact of additional dwellings, policy aspirations for sectoral development and on the changing sectoral trends from the period 1998 to 2007 set out in Appendix D – the longest period over which consistent employment data by sector is available – as well as on the LEFM projections.
- 5.28 The distribution of growth has been carried out in four steps as follows:
- 1 – An Economic Base Projection of Non Basic Service Employment*
- 5.29 The first step in defining the sectoral distribution of the target jobs directly examines the relationship between housing growth and the demand for so called “non-basic” local service jobs – expected to result in the growth of local service employment in, for example, education, health services, retailing, personal services, etc - with or without any aspirations or policy targets for employment growth in these sectors. Economic Base Analysis has been used to define and measure the size of these sectors and examine the relationship between these sectors and the growth of housing using the RSS housing targets to 2026 set out in Table 5.3 above.
- 5.30 The relationship between the growth of new dwellings and local service employment was previously analysed by GHK at a national level, using a cross sectional regression analysis based on 2001 Census and ABI data for every local authority in England. The analysis tested the relationship between the number of dwellings and individual local service sectors defined using 2-digit SIC data. It examined the relationship between the number of dwellings and the level of employment in 18 potentially non-basic sectors and found a statistically significant relationship in 11 local service sectors where nearly all employment can normally be classified as non-basic. The findings show that the relationship is significant and remarkably consistent across the sample of towns and cities such that an increase of one dwelling is associated with an increase of 0.59 jobs in these 11 sectors in total.
- 5.31 In fact the analysis measures the number of jobs generated by the addition of one dwelling in each individual sector. These sectors are:
- Construction;
-

- Sale (and repair) of motor vehicles and fuel;
- Retail trade;
- Hotels and restaurants;
- Real estate activities;
- Public administration, defence and social security;
- Education;
- Health and social work;
- Activities of membership organisations;
- Recreational, cultural and sporting activities;
- Other service activities.

5.32 These ratios were therefore used to estimate the growth in employment in these sectors of the projected increase in dwellings in Nuneaton and Bedworth to 2026 for each scenario. The Economic Base projection, as noted above, focuses only on the non-basic local service sectors identified (no change is predicted by this method in the other ‘basic’ service and manufacturing sectors) but shows that, if the effect of simply increasing the number of dwellings is as analysed, then total employment in these 11 local service sectors can be expected to rise “automatically” by 0.59 times the number of new dwellings.

2 – Projection of Priority Sectors

5.33 Nuneaton and Bedworth Borough Council has identified a number of key priority sectors, which are expected to be targeted by economic development policy in the future. Some of these sectors are expected to perform better than the LEFM projections would suggest, others are expected to reverse declining trends by 2026, while growth of other sectors is likely to be more restricted in the future. In forecasting these key sectors, a range of different treatments were considered: (1) applying an historic trend as described under the Past Trends Scenario above, (2) applying the appropriate dwellings-to-job ratio, (3) keeping the LEFM projection, or (4) maintaining current (2007) employment levels.

5.34 In total, 16 sectors were identified as priority sectors, including seven manufacturing and nine service sectors. For each priority sector, Table 5.4 outlines the relevant LEFM per annum growth rate for Nuneaton and Bedworth, the chosen methodology for each priority sector and the equivalent growth rate applied under each of the two RSS-based scenarios.

Table 5.4 – Selection of Appropriate Projections for Priority Sectors

Sector	Industry	Nuneaton and Bedworth LEFM	Chosen Methodology	Equivalent Applied Growth per annum [^]	
				Scenario A-1 (11,000 New Dwellings)	Scenario A-2 (14,500 New Dwellings)
Manufacturing	29 : Manufacture of other machinery (Mech. engineering)	-2.4%	Past Trend – Full Average Percentage Change p.a.	0.6%	0.7%
Manufacturing	30 : Manufacture of office machinery & computers	0%	LEFM Projection	0.0%	0.1%
Manufacturing	31 : Manufacture of other electrical machinery & apparatus	0%	LEFM Projection	0.0%	0.1%
Manufacturing	32 : Manufacture of radio, TV & communication equipment	0%	LEFM Projection	0.0%	0.1%
Manufacturing	33 : Manufacture of medical, precision & optical instruments	0%	LEFM Projection	0.0%	0.1%
Manufacturing	34 : Manufacture of motor vehicles	-0.6%	Maintain Current Employment	0.0%	0.1%
Manufacturing	35 : Manufacture of transport equipment	-3.6%	Maintain Current Employment	0.0%	0.1%
Service	51 : Wholesale trade	-0.1%	Maintain Current Employment	0.0%	0.1%
Service	52 : Retail trade	0.1%	Dwellings-to-Job Ratio	1.1%	1.5%
Service	55 : Hotels & restaurants	0.2%	Dwellings-to-Job Ratio	1.4%	1.9%
Service	64 : Post & telecommunications	-1.8%	Maintain Current Employment	0.0%	0.1%
Service	70 : Real estate activities	-0.5%	Dwellings-to-Job Ratio	2.4%	3.1%
Service	72 : Computer and related activities	1.5%	LEFM Projection	1.5%	1.6%
Service	73 : Research and development	-0.5%	Past Trend – 2 x Average Percentage Change p.a.	21.4%	21.4%
Service	74 : Other business activities	0.5%	Past Trend – Quarter Ave Absolute Change p.a.	1.3%	1.3%
Service	85 : Health & social work	0.9%	Dwellings-to-Job Ratio	1.7%	2.3%

Source: GHK analysis, 2009

Notes: [^] Equivalent growth rate of applied percentage or absolute change.

5.35 After examining the alternative treatment options, the most appropriate growth rate was selected for each priority sector. The growth rates were selected to:

- Project strong growth in high-value, innovative sectors such as research and development, computing and other professional services;
- Maintain the previous strong growth in the business services sector;

- Project growth in retail, hotels, restaurants and health sectors in line with the projected housing and population growth;
- Minimise the projected employment decline in hi-technology manufacturing and engineering sectors including the motor/transport industry, and in the post and telecommunications sector;
- Project minimal growth in distribution (lower than past trends).

3 - Projection of Employment in 'Non-Priority' Sectors

- 5.36 For the projections of all other primary, manufacturing and basic service sectors ('non-priority' sectors), the LEFM projections are considered to provide the best indicator of employment change and have been used to generate projections to 2026.

4 – Adjustment to Control Employment Totals

- 5.37 Lastly, each sector total was adjusted either up or down in proportion to the distribution of total employment in 2007 in order to control these sectoral changes proportionately back to the respective jobs target for 2026 under Scenarios A-1 and A-2. A straight line trend was then assumed in all sectors from 2008 to 2026.

Reduced Out-Commuting Scenario

- 5.38 Nuneaton and Bedworth has relatively high levels of out-commuting compared to the other Warwickshire districts. As stated above, the two RSS-based scenarios assume a job balance ratio of 70.7% based on 2001 Census data, which is considered the best available estimate of the ratio between the number of jobs and economically active residents in the Borough. More recent estimates are less robust but suggest that job balance could be as low as 60%, based on a larger number of economically active residents and a smaller number of local jobs.
- 5.39 The census data identify approximately 59,350 economically active residents in Nuneaton and Bedworth in 2001, but fewer than 42,000 jobs, which provides the job balance ratio of 70.7%. This suggests that there are significantly fewer jobs in the Borough than there are economically active people, thereby requiring a large proportion of these residents (at least 30%) to travel outside of the Borough to access employment. Furthermore, not all of the jobs in the Borough will employ local residents so the proportion of residents commuting out of the Borough will actually be far greater than the 30%. The Census data suggest that more than 30,000 (51%) economically active residents commute out of the Borough to work.

5.40 Table 5.5 makes comparisons between Nuneaton and Bedworth and the other Warwickshire districts. The data show that Nuneaton and Bedworth has by far the lowest job balance ratio of all Warwickshire districts, i.e. Nuneaton and Bedworth has the smallest number of jobs relative to the size of its economically active population. All other Warwickshire districts have a job balance ratio of more than 90% and the county average is 91%. In the case of Warwick, the ratio is more than 100%, implying that there are more jobs in Warwick than economically active people.

Table 5.5 – Comparison of Job Balance and Commuting Statistics

	Nuneaton & Bedworth	North Warks	Rugby	Stratford-on-Avon	Warwick	Total Warks
Economically Active Resident Population	59,349	31,804	45,036	58,259	65,236	259,684
Number of Local Jobs	41,938	29,316	43,592	52,683	69,021	236,550
Job Balance Ratio	70.7%	92.2%	96.8%	90.4%	105.8%	91.1%
Out-Commuters	30,409	18,918	17,967	24,393	23,723	115,410
Out-Commuters as % of Local Economically Active People	51.2%	59.5%	39.9%	41.9%	36.4%	44.4%

Sources: Census data and GHK analysis, 2009

- 5.41 Interestingly, despite having by far the lowest job balance ratio of all Warwickshire districts, Nuneaton and Bedworth does not have the highest rate of out-commuting. Almost 60% of economically active residents in North Warwickshire commuted out of the Borough to work in 2001, compared to 51% in Nuneaton and Bedworth, despite there being a higher job balance in North Warwickshire.
- 5.42 As mentioned above, it is an aspiration of Nuneaton and Bedworth Borough Council to reduce current rates of out-commuting. It aims to achieve this by ensuring that employment growth in the Borough exceeds the projected growth of the economically active population, thereby increasing job balance and giving local residents greater opportunity to work within the Borough.
- 5.43 It was therefore decided to include another policy-on scenario that specifically aims to increase the job balance ratio and reduce out-commuting. It assumes that the Borough provides additional jobs to reduce the existing jobs deficit and increase the overall job balance. Table 1.5 shows that if Warwick and Nuneaton and Bedworth are excluded, the other Warwickshire districts have similar job balance ratios, averaging 93%. An additional 13,257 jobs would need to be created in Nuneaton and Bedworth to achieve the same job balance ratio. This scenario therefore assumes that a further 13,257 jobs will be created

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- within the Borough by 2026 (i.e. the difference between 93% of the economically active population of 59,349 and the 41,938 local jobs based on Census data). Census data has been used as it is considered most robust, although more recent data suggest an even more significant gap between the current number of jobs and the economically active population, which would require even more jobs to be created.
- 5.44 This 'reduced out-commuting' scenario also assumes the housing growth target of 11,000 new dwellings in the Borough by 2026 but, unlike Scenario A-1, it assumes a job balance ratio of 100%. It therefore assumes that the Borough will provide jobs for all (11,537) of the additional economically active residents associated with the 11,000 new dwellings, rather than the 8,157 jobs assumed in Scenario A-1 (based on the existing job balance ratio of 70.7%). This aims to reduce the requirement for any of the new population to have to 'out-commute'.
- 5.45 In total the scenario assumes a significant additional jobs target of 24,794 by 2026. This scenario therefore aims to 'narrow the gap' between Nuneaton and Bedworth and the other Warwickshire districts in terms of existing job balance, as well as ensuring a sufficient number of additional jobs are created to match the projected growth in the economically active population (associated with the 11,000 planned new dwellings) by 2026. By increasing the job balance ratio and the availability of jobs within the Borough, the scenario aims to reduce the current high levels of out-commuting.
- 5.46 The distribution of growth between individual sectors then follows the same processes and assumptions as the two RSS-based scenarios (A-1 and A-2) by:
- Linking growth in non-basic service employment to the 11,000 planned new dwellings;
 - Using the same growth assumptions for the 16 priority sectors;
 - Applying LEFM projections to other 'Non-Priority' Sectors;
- 5.47 Adjusting each sector total upwards in proportion to the distribution of total employment in 2007 in order to control the sector changes proportionately to the 24,794 jobs target for 2026.

Results of the Employment Scenario Projections

- 5.48 The five economic scenarios introduced above have been summarised below. It should be noted that each scenario is based on the same historic data (up to and including 2007) and includes projections from 2008 to 2026.

SCENARIOS

The 'Baseline' Scenario, using the employment projections produced for Nuneaton and Bedworth Borough by the CE LEFM model and applying these to ABI employment data for each sector.

The 'Past Trends' Scenario, which applies an historic nine year trend (from 1998 to 2007) to generate projections to 2026. The projected growth of individual sectors is based on a range of absolute and percentage trends from the period 1998 to 2007, as the projections generated using the full percentage rates of historic employment growth were considered too high in many sectors. These trends were applied in order that overall employment in Nuneaton and Bedworth is assumed to grow, on average, at the historic rate of 0.6% per annum.

The 'RSS-based' Scenarios (A-1 and A-2) project the employment growth that would be required as a result of the increasing number of dwellings, and therefore an increasing number of people seeking employment, in the Borough. The distribution of this additional employment between sectors takes into account the additional demand for specific local services (e.g. health, education) from the new dwellings, as well as the policy aspirations for key sectors. Scenario A-1 is based on the 11,000 additional dwellings target for Nuneaton and Bedworth as stated in the RSS Phase 2 Revision Panel Report, while Scenario A-2 assumes the number of dwellings will increase by 14,500, including an additional 3,500 houses from the allocation for Coventry.

The 'Reduced Out-Commuting' Scenario projects the employment growth that would be required to 'narrow the gap' between Nuneaton and Bedworth and the other Warwickshire districts in terms of existing job balance, as well as ensuring a sufficient number of additional jobs to match the projected growth in the economically active population (associated with the 11,000 planned new dwellings) by 2026. Increasing the job balance ratio and the availability of jobs within the Borough reduces the need for local residents of Nuneaton and Bedworth to have to commute out of the Borough for work. The distribution of this additional employment between sectors follows the same assumptions as the RSS-based scenarios.

5.49 Summaries of the resulting employment forecasts in 2026 under each scenario are presented in Table 5.6 below. Detailed tables for each individual scenario can be found in Appendix J, providing employment totals at five year intervals for 2007, 2011, 2016, 2021 and 2026.

Table 5.6 – Summary of Employment Projections based on Economic Scenarios

	2007 Actual	2026				
		Baseline	Past Trends	Policy-On (11,000 New Dwellings)	Policy-On (14,500 New Dwellings)	Reduced Out- Commuting (11,000 New Dwellings)
01 : Agriculture/Hunting, etc.	44	0	33	0	1	19
10 : Coal Mining, Peat Extraction	0	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	0	0	0	0
14 : Other mining and quarry	8	8	1	8	8	11
15 : Manf. - food and beverages	164	164	214	165	167	236
16 : Manf. - tobacco	0	0	0	0	0	0
17 : Manf. - textiles	91	0	47	0	2	40
18 : Manf. - wearing apparel	27	0	6	0	1	12
19 : Tanning and dressing of leather	0	0	0	0	0	0
20 : Manf. - wood products	125	63	175	63	65	117
21 : Manf. - pulp and paper products	3	2	0	2	2	3
22 : Publishing and Printing	126	63	84	63	65	118
23 : Manf. - coke, petroleum products	11	11	17	11	11	16
24 : Manf. - chemicals and chemical products	45	0	18	0	1	20
25 : Manf. - rubber and plastic products	93	0	42	0	2	41
26 : Manf. - other non-metallic mineral products	198	99	169	100	103	185
27 : Manf. basic metals	271	271	191	272	276	389
28 : Manf. - fabricated metal products	1,259	899	756	903	923	1,448
29 : Manf. - other machinery	1,028	654	1,058	1,155	1,171	1,600
30 : Manf. - office machinery and computers	4	4	4	4	4	6
31 : Manf. - other electrical machinery	57	57	30	57	58	82
32 : Manf. - communication equipment	9	9	5	9	9	13
33 : Manf. - medical instruments	74	74	58	74	75	106
34 : Manf. - motor vehicles, trailers	917	825	758	920	934	1,317
35 : Manf. - transport equipment	254	127	191	255	259	365
36 : Manf. - furniture; manufacturing n.e.c.	155	155	106	155	158	223
37 : Recycling	1	1	1	1	1	1
40 : Electricity, gas, steam and hot water supply	1	1	1	1	1	1
41 : Collection, purification and distribution of water	0	0	0	0	0	0
45 : Construction	1,791	1,855	1,727	2,324	2,521	3,100
50 : Sale and repair of motor vehicles and fuel	1,093	1,066	1,242	1,316	1,404	1,790
51 : Wholesale trade	2,397	2,337	2,711	2,404	2,442	3,442
52 : Retail trade	5,303	5,390	5,747	6,540	7,012	8,836
55 : Hotels and restaurants	2,034	2,122	1,924	2,656	2,884	3,537
60 : Land transport	1,317	1,475	1,462	1,479	1,500	2,049
61 : Water transport	2	2	2	2	2	3
62 : Air transport	1	1	1	1	1	1
63 : Supporting transport activities/travel agencies	728	815	979	818	829	1,133
64 : Post and telecommunications	1,862	1,314	2,171	1,868	1,897	2,674
65 : Financial intermediation	366	366	313	367	373	526
66 : Insurance and pension funding	167	167	111	168	170	240
67 : Auxiliary financial activities	43	43	29	43	44	62
70 : Real estate activities	286	259	380	452	509	576
71 : Renting of machinery and equipment	244	221	276	222	226	328
72 : Computer and related activities	346	461	401	462	468	612
73 : Research and development	15	14	601	601	601	607
74 : Other business activities	5,232	5,723	6,615	6,631	6,714	8,896
75 : Public administration and defence	1,302	1,202	1,265	1,977	2,211	2,541
80 : Education	4,086	4,584	4,898	5,243	5,671	7,011
85 : Health and social work	3,409	4,021	4,784	4,739	5,213	6,215
90 : Sewage and refuse disposal	78	82	93	82	84	116
91 : Activities of membership organisations	175	184	150	308	352	383
92 : Recreational, cultural and sporting activities	816	859	976	1,159	1,281	1,513
93 : Other service activities	371	391	473	504	552	665
Total	38,429	38,441	43,297	46,586	49,256	63,223

Source: Reference-case projections supplied by Cambridge Econometrics, and GHK analysis, 2009

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- 5.50 The five scenarios provide a range of projections for employment growth in Nuneaton and Bedworth to 2026, while the extent of these projections also varies considerably between the scenarios. The baseline scenario is a particularly conservative forecast, projecting a large employment decline to 2012 as a result of the current recession, followed by a slow recovery, such that total employment in the Borough only returns to current (2007) levels by 2026, effectively projecting zero employment growth over the period 2007 to 2026.
- 5.51 If overall employment in the Borough was to continue increasing at the recent historic rate of 0.6% per annum (based on past performance between 1998 and 2007), then employment in 2026 would have increased by 4,870 to around 43,300. It is important to note that this past trend is significantly lower than the 1.3% average trend from the period 1998 to 2006 and shows the effect of the significant fall in employment in 2007 on the overall trend. This also acts to control the past trends scenario and ensure it is not overly optimistic in light of the current economic situation. However, it is equally important that the projections based on past trends are not overly pessimistic or give too much weight to the current economic situation, when projecting 20 years into the future. These assumptions should therefore be kept under review, given that the ABI data suggest the employment growth trend could be between 0.6% and 1.3% per annum.
- 5.52 Interestingly, the analysis suggests that to meet the current dwellings target in the RSS (11,000 new homes), the Borough would require more than 8,150 additional jobs, which is higher than the number of jobs projected under the past trends scenario. Furthermore, in order to meet the higher dwellings target of 14,500 new homes, it is estimated that more than 10,800 new jobs would need to be created – more than twice as many as under the past trends scenario.
- 5.53 However, the ‘reduced out-commuting’ scenario suggests that an additional 28,950 jobs would be required if the number of jobs provided in the Borough is to match the number of economically active residents by 2026. This scenario also assumes the current RSS dwellings target of 11,000 new homes and shows the significant jobs growth required if the Borough is to achieve a Job Balance Ratio of 100%. This growth is many times stronger than that projected by either the past trends or the RSS-based scenarios.
- 5.54 The scenarios generally project similar overall trends, albeit with different magnitudes, of declining employment in primary and manufacturing sectors and employment growth in the service sectors, which is consistent with national and regional trends, as well as local past trends in the Borough. The exception is the ‘reduced out-commuting’ scenario, which also forecasts growth in manufacturing sectors, driven by stronger employment projections in hi-
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technology manufacturing and engineering activities. The two RSS-based scenarios, and particularly the 'reduced out-commuting' scenario, also forecast strong employment growth in the high-value, knowledge-intensive, service sectors, and the 'non-basic' service sectors (retail, restaurants, education, health, etc.) required to support the significant housing and population projections.

Step 3: Employment and Land Categorisation

Create Appropriate Sector Groupings

- 5.55 The next step was to identify appropriate sector groupings for Nuneaton and Bedworth, which reflect the local structure and spatial distribution of employment and different land use types. This requires the selection and aggregation of the 41 CE sectors and 54 ABI sectors (based on 2 digit SIC data) to develop a shortlist of around 25 sector groupings, based on an analysis of sector size, growth and local concentrations / competitive advantages. It is important that there are a sufficient number of sector groups to provide an accurate representation of the local economy but should not be too disaggregated as to make the analysis unmanageable.
- 5.56 In general there are some clear groupings of manufacturing activities, such as Motor Vehicles and Other Transport Equipment, whilst the growing service sectors should remain sufficiently disaggregated to reflect the different land use types associated with them.
- 5.57 Some 27 groups - 10 manufacturing groups and 17 service groups - were adopted for forecasting purposes. The groupings are set out below in Table 5.7, together with the corresponding CE industrial sectors and the 2-digit SIC categories for each. It should be noted that **not all** CE sectors and 2-digit categories are included – primary agricultural and extractive industries are for example excluded since they do not directly give rise to demand for employment land. Furthermore, employment in some sectors in Nuneaton and Bedworth is very low or non-existent and the manufacture of tobacco, manufacture of leather products, collection, purification and distribution of water, and water and air transport sectors have therefore also been excluded. In addition, employment in the following SIC categories was moderated to the following percentages of employment, which were assumed to give rise to demand for employment land:
- Utilities (Electricity, gas and water): 30% of employment assumed to be in headquarters and other office premises.
 - Construction: 33.3% of employment assumed to be located in fixed employment premises.

- Education: 10% of employment assumed to be in non-educational, mainly office premises.
- Health and social work: 15% assumed to be in headquarters and other office premises.

Table 5.7 – Selected Sector Groups and Corresponding CE and SIC Sectors

	Sector Groupings	CE Definition	SIC 2003
M1	Food & Beverages	5 Food, Drink & Tobacco	15
M2	Wood & Wood Products	7 Wood & Paper (Part of)	20
M3	Printing & Publishing	8 Printing & Publishing	22
M4	Chemical, Plastic & Non-Metallic Materials/Products	10 Pharmaceuticals 11 Chemicals nes 12 Rubber & Plastics 13 Non-Metallic Mineral Products	24.4 24 (excl 24.4) 25 26
M5	Basic Metals	14 Basic Metals	27
M6	Metal Goods	15 Metal Goods	28
M7	Mechanical Engineering	16 Mechanical Engineering	29
M8	Electronics, Electrical Engineering & Instruments	17 Electronics 18 Electrical Engineering & Instruments	30, 32 31, 33
M9	Motor Vehicles & Other Transport Equipment	19 Motor Vehicles 20 Other Transport Equipment	34 35
M10	Manufacturing nes	6 Textiles, Clothing & Leather 7 Wood & Paper (Part of) 9 Manufactured Fuels 21 Manufacturing nes	17, 18 21 23 36, 37
S1	Utilities	22 Electricity 23 Gas Supply 24 Water Supply 41 Other Services (Part of)	40.1 40.2 40.3 90
S2	Construction	25 Construction	45
S3	Wholesale Distribution	26 Distribution (Part of)	51
S4	Sale and Repair of Motor Vehicles and Fuel	26 Distribution (Part of)	50
S5	Retailing	27 Retailing	52
S6	Hotels & Catering	28 Hotels & Catering	55
S7	Land Transport	29 Land Transport etc	60, 63
S8	Communications	32 Communications	64
S9	Insurance, Banking & Finance	33 Banking & Finance 34 Insurance	65, 67 66
S10	Computing Services	35 Computing Services	72
S11	Real Estate & Professional Services	36 Professional Services (Part of)	70, 73
S12	Other Business Services	37 Other Business Services	74
S13	Public Administration & Defence	38 Public Administration & Defence	75
S14	Education	39 Education	80
S15	Health & Social Work	40 Health & Social Work	85
S16	Recreational, Cultural & Sporting Activities	41 Other Services (Part of)	92
S17	Other Services	36 Professional Services (Part of) 41 Other Services (Part of)	71 91,93

Source: Cambridge Econometrics and GHK analysis, 2009

5.58 Table 5.8 provides the total and sector breakdown of employment for these 27 sector groups under each scenario. It should be noted that the employment figures presented in Table 5.8

have not been moderated. For each of these 27 individual sectors (M1-M10 and S1-S17) retained in the analysis, either 100% or the moderated percentage of employment set out in paragraph 5.57 above is then used to calculate the employment land demand projections in our conversion model.

Table 5.8 – Employment in Selected Sector Groups

	2007 Actual	2026				
		Baseline	Past Trends	Scenario A-1 (11,000 New Dwellings)	Scenario A-2 (14,500 New Dwellings)	Reduced Out-Commuting (11,000 New Dwellings)
M1 Food & Beverages	164	164	214	165	167	236
M2 Wood & Wood Products	125	63	175	63	65	117
M3 Printing & Publishing	126	63	84	63	65	118
M4 Chemical, Plastic & Non-Metallic Materials/Products	336	99	229	100	105	245
M5 Basic Metals	271	271	191	272	276	389
M6 Metal Goods	1,259	899	756	903	923	1,448
M7 Mechanical Engineering	1,028	654	1,058	1,155	1,171	1,600
M8 Electronics, Electrical Engineering & Instruments	144	144	97	144	147	207
M9 Motor Vehicles & Other Transport Equipment	1,171	952	949	1,175	1,193	1,682
M10 Manufacturing nes	288	169	177	169	174	294
S1 Utilities	79	83	94	83	85	118
S2 Construction	1,791	1,855	1,727	2,324	2,521	3,100
S3 Wholesale Distribution	2,397	2,337	2,711	2,404	2,442	3,442
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1,093	1,066	1,242	1,316	1,404	1,790
S5 Retailing	5,303	5,390	5,747	6,540	7,012	8,836
S6 Hotels & Catering	2,034	2,122	1,924	2,656	2,884	3,537
S7 Land Transport	2,045	2,290	2,441	2,297	2,329	3,182
S8 Communications	1,862	1,314	2,171	1,868	1,897	2,674
S9 Insurance, Banking & Finance	576	576	453	578	587	827
S10 Computing Services	346	461	401	462	468	612
S11 Real Estate & Professional Services	301	273	980	1,053	1,110	1,183
S12 Other Business Services	5,232	5,723	6,615	6,631	6,714	8,896
S13 Public Administration & Defence	1,302	1,202	1,265	1,977	2,211	2,541
S14 Education	4,086	4,584	4,898	5,243	5,671	7,011
S15 Health & Social Work	3,409	4,021	4,784	4,739	5,213	6,215
S16 Recreational, cultural and sporting activities	816	859	976	1,159	1,281	1,513
S17 Other Services	790	796	899	1,034	1,130	1,376
Total	38,374	38,430	43,260	46,575	49,244	63,188

Source: GHK analysis, 2009

Match to Land Use Class Categories

- 5.59 This step goes on to allocate all or divide parts of these employment sector groups between the standard land use categories. These were allocated on the basis of professional judgement and experience of the consultants' team, but have remained disaggregated as far as possible in order to narrow the range of the judgement to be made for any individual employment group or land use category. Thus the full breakdown of land use classes (e.g. A1, A2a,b,c etc., A3, B1a,b,c etc., B2, B8, C1) is used together with the 27 sector groups. Where an employment group is allocated to more than one land use class, the percentage of employment assumed to be in each land use class has been identified. Wherever possible this has been determined using 2, 3 or even 4-digit SIC data (2007 ABI data) to determine the proportions of employees in each relevant sub-sector, for example to reflect the split between employment in hotels and employment in restaurants for the study area.

- 5.60 Appendix A shows how the 27 sectors and the proportion of employment in each sector are allocated to the land use categories. All further aggregations of employment, floorspace and employment land use categories are based on this disaggregation.

Step 4: Employment Densities and Floorspace Requirements

- 5.61 Employment densities are a key link between employment change and land use, and need to be applied in the model to convert the employment forecasts to floorspace requirements. The DCLG Guidance cites a number of comparative density analyses of which the most detailed are those prepared by Arup Economics and Planning based on original survey data. We have re-examined these and compared them with those also cited in the Guidance. The variation in the key sectors such as office, warehousing and industrial are limited and the Arup densities cited are the most disaggregated and therefore adaptable for use in the disaggregated model form adopted for this study. We therefore recommend the use of the Arup estimates as the most authoritative and fit for purpose, and these are summarised in Table 5.9 below.
- 5.62 It should be noted that most of the Arup densities are quoted as gross internal floorspace per worker and that these have been converted to gross external rates by increasing all business and industrial classes (B1 and B2) by +3.5% and increasing all shops, financial and professional services, hotels and catering premises (A1, A2, A3 and C1) by +10%, whilst the densities for storage and distribution (B8) have remained unchanged.

Table 5.9 – Worker Densities Adopted for Nuneaton and Bedworth Sectors

Activity	Sector Group	Land Use Category	Density (sq. m / worker)
Manufacturing	General & Specialist Manufacturing: M1, M2, M3, M4, M5, M6, M7, M10	B2	34
	Electronics, Electronic Engineering & Instruments: M8	B1c	34 / 29
	Transport Equipment: M9	B2	34
Logistics & Distribution	Land Transport: S7	B8	80
	Wholesale Distribution / Transport & Communications: S3, S7, S8	B8	50
Automotive	Motor Distribution & Fuel: S4	B2	34
Offices	Various: S1, S2, S5, S9, S10, S11, S12, S13, S14, S15, S17	B1a	19
	Real Estate & Professional Services: S11	B1b	29
Retail	Retail Shops / Computer Services: S5, S10	A1	19
	Insurance, Banking & Finance: S9	A2a	20
	Retailing / Computing / Other Services: S5, S10, S17	A2a/b	19
	Recreational, Cultural, Sporting & Other Services: S16, S17	A2c	20
	Hotels & Catering: S6	A3 / C1	13

Source: Arup Economics and Planning employment densities produced for English Partnerships and RDAs, 2001, and GHK analysis, 2009

- 5.63 The density assumptions used are based on current worker/floorspace densities. There are factors impacting on future employment densities which may move towards lower overall densities or less reliance upon traditional forms of employment floorspace to meet economic needs. This study has not made adjustments for such changes because we believe it is better to use consistent and well understood national estimates for long term forecasting, whilst recognising that these should be monitored.
- 5.64 These employment densities have been applied in each sector and land use category using the consultant's transformation model and the resulting estimates of floorspace requirements for 2026 are summarised in Table 5.10 below. Detailed tables for each individual scenario can be found in Appendix C.

Table 5.10 – Nuneaton and Bedworth Floorspace Requirements by Land Use Class (sqm): Total Requirement 2026 and Change in Requirement 2007 – 2026, by Scenario

	Nuneaton and Bedworth – Total Floorspace Requirement 2026					
	2007	Baseline	Past Trends	Scenario A-1 (11,000 New Dwellings)	Scenario A-2 (14,500 New Dwellings)	Reduced Out-Commuting (11,000 New Dwellings)
A1	37,664	38,510	40,871	46,525	49,825	62,831
A2	79,125	81,869	86,936	100,929	108,825	135,184
A3	27,632	28,833	26,140	36,085	39,183	48,047
B1a	210,223	222,208	257,231	284,650	298,990	375,662
B1b	452	409	1,471	1,580	1,666	1,775
B1c	4,695	4,695	3,156	4,709	4,783	6,742
B2	206,249	154,816	178,596	189,366	195,077	278,657
B8	355,078	341,754	413,737	373,219	378,810	526,942
C1	1,454	1,518	1,376	1,899	2,062	2,529
Total	922,571	874,613	1,009,515	1,038,963	1,079,221	1,438,369
	Nuneaton and Bedworth – Absolute Change in Floorspace Requirement 2007- 2026					
		Baseline	Past Trends	Scenario A-1 (11,000 New Dwellings)	Scenario A-2 (14,500 New Dwellings)	Reduced Out-Commuting (11,000 New Dwellings)
A1	-	847	3,208	8,862	12,161	25,167
A2	-	2,744	7,811	21,804	29,700	56,059
A3	-	1,201	-1,492	8,453	11,551	20,416
B1a	-	11,985	47,007	74,427	88,767	165,439
B1b	-	-42	1,020	1,128	1,214	1,323
B1c	-	0	-1,538	14	88	2,047
B2	-	-51,432	-27,652	-16,882	-11,171	72,408
B8	-	-13,323	58,660	18,142	23,733	171,865
C1	-	63	-79	445	608	1,075
Total	-	-47,958	86,944	116,392	156,649	515,798

Source: GHK analysis, 2009

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- 5.65 Table 5.10 summarises the floorspace requirements for each scenario in 2026 and the change between 2007 and 2026. The baseline scenario projected minimal change in the overall level of employment in the Borough between 2007 and 2026. However, the economic structure was projected to change significantly with declining employment in the more ‘land-intensive’ manufacturing (B2) and distribution (B8) sectors and growing employment in office (B1a) and retail (A-classes) sectors. The overall impact of these changes is therefore projected to be a smaller requirement for floorspace within the Borough of -48,000 square metres.
- 5.66 In contrast with the baseline projections, the other scenarios project increasing demand for floorspace in line with the respective employment projections. The past trends scenario projects an increase of 87,000 square metres of floorspace required by 2026, followed by the two policy-on scenarios, which project requirements for an additional 116,000 square metres (11,000 new dwellings) and 157,000 square metres (14,500 new dwellings). The ‘reduced out-commuting’ scenario projects the most significant increase of 516,000 square metres of floorspace, required to deliver the considerable number of additional jobs in the Borough by 2026.
- 5.67 The increased floorspace requirements under the past trends scenario are being driven by increased demand for storage and distribution (B8) and office (B1a) space. Distribution, warehousing and transportation sectors are already a significant and growing source of employment in the Borough and past employment trends suggest demand for B8 floorspace has exceeded demand for offices (B1a). Interestingly the past trends scenario suggests that the projected decline in demand for manufacturing (B2) floorspace is only half the level projected by the baseline scenario.
- 5.68 The higher requirement for employment floorspace projected by the policy-on scenarios is being driven primarily by significant increases in demand for office space (B1a), but also a greater requirement for retail (A1), financial and professional services (A2) and food and drink (A3) floorspace, in line with local aspirations and expectations. These scenarios also project some growth in demand for storage and distribution (B8) floorspace although efforts have been made to curb the strong past trends and encourage growth of other land use types, including research and development (B1b), light industrial (B1c), hotels (C1) and stemming some of the declining demand for manufacturing (B2) floorspace.
- 5.69 The ‘reduced out-commuting’ scenario projects increased demand for all types of land use, including manufacturing (B2) floorspace, which is in contrast to the other scenarios. However, the increased demand for floorspace in this scenario is being driven by demand for storage and distribution (B8) and office (B1a) space – the existing areas of concentration within the
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Borough. The scenario also projects strong growth for retail (A1), financial and professional services (A2), food and drink (A3), research and development (B1b), light industrial (B1c) and hotels (C1) floorspace.

Step 5: Forecasting Land Requirements

- 5.70 This section details how we have converted the estimates of floorspace required in Table 5.10 above into estimates of land.

Churn / Leakage

Churn

- 5.71 Employment driven floorspace demand is likely to be the significant driver of the demand for additional floorspace in a local economy. However, it is also true that an element of demand will arise from companies moving, either due to obsolescence of their existing property, the desire for a lower or higher cost location, or simply for strategic reasons. Furthermore, the regeneration process will give rise to business relocations which creates further demand for employment land. This form of demand is called ‘churn’ and it represents a general level of turnover in property requirements. Churn can have a significant effect on the amount of employment land and floorspace that is required in order to meet the predicted demand. The basis of calculating Churn is to look at the existing amount of stock in the district. We have taken the most up to date information available from the Office of National Statistics, which is currently from 2005. This data is shown in Table 5.11 below.

Table 5.11 - Baseline Amount of Floorspace in Nuneaton and Bedworth (2005)

Bulk Class	Land Use Designation	Floorspace (m2)
Offices	B1	98,000
Factories	B2	468,000
Warehouses	B8	442,000
Total		1,008,000

Source: Office of National Statistics, 2009

- 5.72 Estimating churn and its relationship to employment driven demand is not straightforward. Both employment churn and property churn factors are drivers of demand for business floorspace. For example, premises that are vacated by declining sectors can, subject to planning and suitability, be occupied by expanding sectors. GVA Grimley has used knowledge

from previous studies (Warwick, Redditch, Worcestershire and the Black Country) to devise a set of assumptions regarding the level of churn for different land use classes. These assumptions are in line with other studies and are set out in Table 5.12 below. Churn figures are then applied to the stock figures in Table 5.11 above.

Table 5.12 – Churn Factors

Land Use Class	Churn Factor
B1a/B1b	1% per year
B1c/B2	1% per year
B8	1% per year

GVA Grimley analysis, 2008

5.73 In arriving at the churn figures detailed in Table 5.12 above we have taken into account a number of significant factors. We have reviewed inward investment queries and take up data to gain an understanding of where companies are moving to and the types of employment land that are being completed recently.

5.74 As can be seen in Table 5.13 below the effect of churn in creating additional demand to be added to that coming from the model is approximately 50ha over 20 years.

Table 5.13 – Overall Effects of Churn

Nuneaton and Bedworth	Bulk Class	Land Use Designation	Floorspace (m ²)	Churn (floorspace (m ² / year))	Churn (land (ha / year))	Churn (land (ha)) 11 Year Summary (to 2016)	Churn (land (ha)) 21 Year Summary (to 2026)
	Offices	B1	98,000	980	0.30	3.02	6.03
	Factories	B2	468,000	4,680	1.17	11.70	23.40
	Warehouses	B8	442,000	4,420	0.88	8.84	17.68
	Total		1,008,000	10,080	2.36	23.56	47.11

Source: DCLG, 2005 and GVA Grimley analysis, 2009

Leakage

5.75 We have also considered the effect of leakage from employment areas to other employment locations such as town centres and other places not classified as employment land. This includes in local centres, above shops, people's spare rooms and garages. Leakage has a more noticeable effect on the demand for office space, simply because offices can be located in a wider range of locations, not just recognised employment areas.

-
- 5.76 In terms of offices, we have assumed that 65% of office jobs are likely to locate on employment sites and that the remaining 35% are likely to locate elsewhere within Nuneaton and Bedworth. Of the 35%, we have assumed that the majority of this (between 70% and 90% - dependent on scenario) will be located within Nuneaton town centre with the remainder located in Bedworth town centre and other areas not recognised as employment land. In coming to this view we have been guided by Policy PA13A of the WMRSS Preferred Options, which highlights that around 30,000sq m of new office development will be built in, or adjoining Nuneaton town centre over the period 2006 – 2026. This amounts to around 90% of the total office floorspace demand that is accounted for through leakage under the RSS Scenario (11,000 homes), and around 70% of office floorspace under the RSS Scenario for 14,500 homes, and demonstrates the step change in approach required to direct the majority of office development to the town centre.
- 5.77 For industrial and distribution type premises, the amount of leakage is much lower and the situation slightly less complex. Industrial and distribution developments have a much stronger reliance on allocated employment land, and therefore, in line with assumptions we have used in previous studies, we have assumed that for industrial demand, a general leakage figure of 10% will apply.
- 5.78 This is reflective of the fact that it is unlikely that any new development in the B2 / B8 use classes would be on non-employment land and is more likely to be on designated employment sites and takes account of the fact that some B8 storage uses can be accommodated in existing redundant buildings that were formerly used as factories.
- 5.79 Furthermore, taking into account the large amount of greenbelt land around Nuneaton and Bedworth we would expect very few new B2 / B8 developments to be on land that is not designated employment land. Notwithstanding this we have made an allowance for instances of leakage to non-employment designations, an example of which would be the re-use / intensification of existing employment areas. The leakage figure of 10% therefore implies that 90% of all demand for industrial type premises will be located in employment areas, and the rest will be absorbed by other locations.

Plot Ratios

- 5.80 The amount of floorspace that is built per net hectare is an important factor to consider when predicting employment land requirements. We have used experience from other Employment Land Review projects that we have undertaken, to ascertain the average amount of

floorspace being built per hectare. This enables floorspace requirements (sq.m) to be converted into estimates of employment land (ha).

- 5.81 Table 5.14 below summarises the average plot ratios we have used for this study. These are in line with the guidance on plot ratios as set out in Box D.7 of the ODPM ELR guidance.

Table 5.14 – Plot Ratio Assumptions

Land Use Class	Average Plot Ratio (sq.m per ha)
B1a / B1b	3,250
B1c / B2	4,000
B8	5,000

Source: GVA Grimley analysis, 2009

Completions of Employment Land

- 5.82 The demand forecasts we have prepared run from 2007 – 2026. However, this study has taken a snapshot of supply in 2009 and therefore needs to take account of any completions made between 2007 – 2009 and deduct these from the demand forecasts. We have reviewed the Annual Monitoring Reports, produced by Nuneaton and Bedworth Borough Council, from 2007 – 2009 in order to determine the level of completions in that time. This information is shown in Table 5.15 below.

Table 5.15 – Employment Completions within Nuneaton and Bedworth (2007 – 2009)

Year	Completions by Land Use Class (sq m)			Total
	B1a / B1b	B1c / B2	B8	
2007/08	6,959	5,045	4,109	16,113
2008/09	4,227	3,014	2,751	9,995
Total	11,186	8,059	6,860	26,108

Source, NBBC Annual Monitoring Reports 2007/08 & 2008/09

- 5.83 As can be seen in Table 5.15 above, there has been around 11,200 sq m of office space completed in the last year, around 8,000 sq m of factories and 6,900 sq m of distribution (where the Annual Monitoring Reports give a combined figure for more than one land use class (e.g. B1 / B2 / B8) we have split the total floorspace equally between them). This gives a total of 26,108sq m of completions over the last two monitoring years which we take into account within the demand forecasts.

Net to Gross Ratios

- 5.84 We have applied a net to gross ratio of 10% to account for miscellaneous land uses (such as landscaping, car parking and major infrastructure) that cannot be used for development of employment premises, but are essential within any site. This factor is based on past experience in the locality and a review of recent planning applications.
- 5.85 The next section outlines the forecasts of employment land demand within Nuneaton and Bedworth, based on the employment projections and assumptions detailed in this section.

6. FORECASTS OF FUTURE EMPLOYMENT LAND DEMAND

6.1 This section details the demand forecasts based on the scenarios and assumptions detailed in Section 5. We have presented demand forecasts for each scenario, in terms of floorspace (sq.m) and land (ha) requirements. More detailed tables can be found at Appendix M.

Baseline Scenario

6.2 The total floorspace and land requirements under the Baseline Scenario are shown in Table 6.1 below. They show a requirement of around 9.5ha B1a, 26ha B2 and 22ha B8, giving an overall requirement of around 57.5ha to 2026. This takes into account the impact of churn leakage, completions and relocations. More detailed tables can be found at Appendix M.

Table 6.1 – Baseline Scenario – Floorspace and Land Requirements to 2026

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0	10,701	14,878	21,881	28,018
B1c / B2	0	32,590	53,650	74,710	95,770
B8	0	38,803	58,693	78,583	98,473
Total	0	82,093	127,220	175,174	222,261

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0.00	3.62	5.04	7.41	9.48
B1c / B2	0.00	8.96	14.75	20.55	26.34
B8	0.00	8.54	12.91	17.29	21.66
Total	0.00	21.12	32.70	45.24	57.48

Source: GVA Grimley analysis, 2009

RSS Scenario (based on 11,000 new homes)

6.3 The total floorspace and land requirements under the RSS Scenario based on 11,000 new homes are shown in Table 6.2 below. They show a requirement of around 23.5ha B1a, 26ha B2 and 25ha B8, giving an overall requirement of around 75ha to 2026. This takes into account the impact of churn leakage, completions and relocations. More detailed tables can be found at Appendix M.

Table 6.2 – RSS Scenario (11,000 new homes) – Floorspace and Land Requirements to 2026

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0	18,675	32,933	49,177	69,366
B1c / B2	0	32,590	53,650	74,710	95,770
B8	0	42,090	66,200	90,435	114,800
Total	0	93,355	152,782	214,321	279,936

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0.00	6.32	11.15	16.64	23.48
B1c / B2	0.00	8.96	14.75	20.55	26.34
B8	0.00	9.26	14.56	19.90	25.26
Total	0.00	24.54	40.46	57.09	75.07

Source: GVA Grimley analysis, 2009

RSS Scenario (based on 14,500 new homes)

- 6.4 The total floorspace and land requirements under the RSS Scenario based on 14,500 new homes are shown in Table 6.3 below. They show a requirement of around 27ha B1a, 26ha B2 and 26ha B8, giving an overall requirement of around 79ha to 2026. This takes into account the impact of churn leakage, completions and relocations. More detailed tables can be found at Appendix M.

Table 6.3 – RSS Scenario (14,500 new homes) – Floorspace and Land Requirements to 2026

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0	20,163	36,608	55,458	78,743
B1c / B2	0	32,590	53,650	74,710	95,770
B8	0	43,105	68,515	94,090	119,832
Total	0	95,857	158,772	224,257	294,345

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0.00	6.82	12.39	18.77	26.65
B1c / B2	0.00	8.96	14.75	20.55	26.34
B8	0.00	9.48	15.07	20.70	26.36
Total	0.00	25.27	42.22	60.02	79.35

Source: GVA Grimley analysis, 2009

Past Trends Scenario

6.5 The total floorspace and land requirements under the Past Trends Scenario are shown in Table 6.4 below. They show a requirement of around 17ha B1a, 26ha B2 and 33ha B8, giving an overall requirement of around 77ha to 2026. This takes into account the impact of churn leakage, completions and relocations. More detailed tables can be found at Appendix M.

Table 6.4 – Past Trends Scenario – Floorspace and Land Requirements to 2026

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0	15,390	25,208	36,597	51,473
B1c / B2	0	32,590	53,650	74,710	95,770
B8	0	49,147	82,523	116,551	151,267
Total	0	97,127	161,381	227,857	298,509

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0.00	5.21	8.53	12.39	17.42
B1c / B2	0.00	8.96	14.75	20.55	26.34
B8	0.00	10.81	18.16	25.64	33.28
Total	0.00	24.98	41.44	58.57	77.04

Source: GVA Grimley analysis, 2009

Reduced Out-Commuting Scenario

6.6 The total floorspace and land requirements under the Reduced Commuting Scenario are shown in Table 6.5 below. They show a requirement of around 44ha B1a, 45ha B2 and 56ha B8, giving an overall requirement of around 144ha to 2026. This takes into account the impact of churn leakage, completions and relocations. More detailed tables can be found at Appendix M.

Table 6.5 – Reduced Commuting Scenario – Floorspace and Land Requirements to 2026

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0	27,713	55,553	88,355	128,651
B1c / B2	0	44,029	81,294	120,816	162,779
B8	0	66,451	124,326	186,403	253,151
Total	0	138,193	261,173	395,574	544,581

Use Class	2007	2011	2016	2021	2026
B1a / B1b	0.00	9.38	18.80	29.90	43.54
B1c / B2	0.00	12.11	22.36	33.22	44.76
B8	0.00	14.62	27.35	41.01	55.69
Total	0.00	36.11	68.51	104.14	144.00

Source: GVA Grimley analysis, 2009

Summary

- 6.7 This section has shown that there is predicted to be a requirement for employment land of between 57-144ha of employment land within Nuneaton and Bedworth to 2026, as shown in Table 6.6 below.

Table 6.6 – Summary of Employment Land Requirements (2007 – 2026)

Scenario	Employment Land Demand 2007 to 2026 (ha)			
	B1a / B1b	B1c / B2	B8	Total
Baseline	9.48	26.34	21.66	57.48
RSS Scenario – 11,000 New Homes	23.48	26.34	25.26	75.07
RSS Scenario – 14,500 New Homes	26.65	26.34	26.36	79.35
Past Trends	17.42	26.34	33.28	77.04
Reduced Out-Commuting	43.54	44.76	55.69	144.00

Source, GVA Grimley analysis, 2010

- 6.8 Table 6.6 above shows that if Nuneaton and Bedworth were to continue growing at the baseline level over the period to 2026, the overall requirement for employment land would be around 57.5ha. If the RSS scenario based on 11,000 new homes were chosen as the preferred scenario, there would be a requirement of around 75ha of employment land, with around 23.5ha (31%) being for offices, 26ha (35%) for manufacturing and 25ha (34%) for distribution.
- 6.9 The RSS scenario, based on 14,500 new homes shows a requirement of 79ha, whilst the Past Trends scenario predicts employment land demand of 77ha. The Reduced Out-Commuting

scenario identifies much higher levels of growth, with around 144ha required, which is almost double the RSS Scenario (14,500 new homes), which predicts the second highest amount of employment land demand. The figures for manufacturing are consistent across all of the scenarios because these sectors have been predicted to have negative growth in terms of employment. Therefore, the only demand for these types of premises will come from churn.

- 6.10 Comparison of these figures shows that if the higher (14,500) housing figures in Nuneaton and Bedworth were adopted, the Borough would need to continue to grow in employment terms at a slightly higher rate (2.5%) than it has grown in the last nine years, in order to accommodate the higher level of housing growth. If the lower housing figure (11,000 new homes) were adopted, this would mean that the Borough would need to grow at a slightly lower rate (2.6%) than it has done for the last nine years. If the Reduced Out Commuting Scenario were adopted, this would require the Borough's economy to grow by 87% higher than it has done over the past nine years. This represents a significant challenge for the Borough, and we would urge caution to the Council against adopting this scenario. There needs to be a balance between aspiration and realism in predicting economic growth, and we feel that the magnitude of change over the period of time indicated is beyond what could realistically be achieved. We would recommend that the Council continues to adopt an aspirational stance to economic growth, but that this is tempered with a market realism to provide a more balanced approach.

Comparison with the West Midlands RSS

- 6.11 The Panel Report of the EiP for the Phase 2 Revision of the WMRSS identifies a rolling five year reservoir of employment land for Nuneaton and Bedworth of 32ha and a longer term requirement (to 2026) of 128ha; the longer term requirement being based on four times the five year rolling supply figure. A comparison of the demand forecasts produced as part of this study and the WMRSS figures is shown in Table 6.7 below.

Table 6.7 – Comparison of Demand Forecasts and WMRSS Figures

Scenario	Requirement to 2026 (ha)
Baseline	57.48
RSS Scenario – 11,000 New Homes	75.07
RSS Scenario – 14,500 New Homes	79.35
Past Trends	77.04
Reduced Out Commuting	144.00
<i>compared to WMRSS</i>	
WMRSS Requirement	128

Source: GVA Grimley analysis, 2010

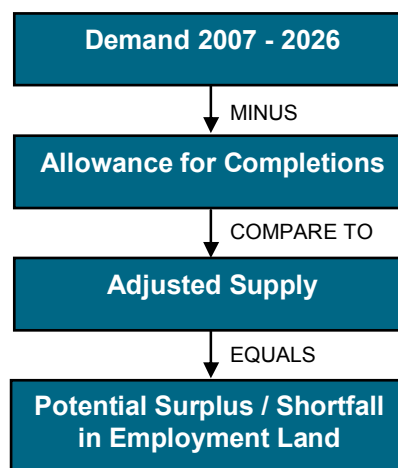
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- 6.12 Table 6.7 above shows that the employment land demand predicted in four of the scenarios is lower than that required by the WMRSS, reflecting the more conservative forecasts that are emerging as a result of the current downturn in the UK economy. The Reduced Out-Commuting scenario predicts growth that is higher than the RSS requirement, reflecting the aspirational nature of this scenario. Comparing these figures back to those produced as part of the CSW employment land review (shown in Table 2.2), this report predicted a requirement for Nuneaton and Bedworth of between 15.7ha – 154ha, a range of some 138.3ha. The figures produced as part of this study have a range of around 21.87ha (excluding the Reduced Out-Commuting scenario), indicating a much more focussed set of requirements.
- 6.13 These comparisons to other studies give some confidence that the figures produced as part of this study are in the right ballpark. These figures are below that identified in the WMRSS, but are reflective of the latest available data from CE LEFM, which are dated June 2009 and therefore take into account the current downturn in the global economy and the knock on effects this has on the growth of the economy. This may explain why the figures for the RSS scenario (11,000 and 14,500 new homes) are lower than the figures in the WMRSS, however we feel that taking account of the current market conditions in predicting employment land demand provides a much more robust set of requirements. Differences may also be attributed to variations in the methodology, assumptions made and the data used.
- 6.14 The next section of this report compares the anticipated demand for employment land against the identified supply.

7. COMPARISON OF DEMAND & SUPPLY

Introduction

- 7.1 This chapter reviews the demand forecasts presented in Section 6 and compares these against the supply of employment land, which is detailed in Section 4.
- 7.2 We have adhered to the guidance produced by ODPM in preparing employment land studies in this work. In order to compare demand and potential supply of employment land we have adopted the methodology set out below.

Figure 7.1 – Gap Analysis Approach



Source: GVA Grimley, 2010

- 7.3 Each of these elements is discussed briefly below:
- **Demand 2007 – 2026.** This reflects the demand forecasts developed in Section 5 and summarised at Table 6.6. These reflect a range of alternative outcomes and include both predictions of employment demand based on economic modelling and extrapolation of past trends in terms of employment change:
 - **Allowance for Completions.** This takes account of completions of employment land from 2007 – 2009, as detailed in
 - Table 5.15, an adjustment we have made in order to align the demand scenarios, which run from 2007 – 2026, with the supply, which is a snapshot taken in 2009;

- **Adjusted Supply.** This reflects our analysis of capacity in Section 4 and summarised at Table 4.13. This is termed adjusted supply since we have removed a number of sites either due to them being poor scoring or being longstanding sites; and
- **Potential Shortfall / Surplus in Employment.** The outcome of this analysis is presented in terms of the significant use classes Offices (B1/a/b), Factories (B1/c/B2) and Warehouses (B8). A surplus indicates that there is sufficient supply already identified to meet predicted needs, a shortfall identifies that additional employment land will need to be identified to meet future needs.

Demand v Supply

7.4 Table 7.1 below compares the predicted demand for employment land with the identified supply.

Table 7.1 – Comparison of Employment Land Demand and Supply within Nuneaton and Bedworth

Demand (2007 – 2026)	Scenario	Offices	Factories	Warehouses	Total
	Baseline	9.48	26.34	21.66	57.48
	RSS Scenario - 11,000 New Homes	23.48	26.34	25.26	75.07
	RSS Scenario - 14,500 New Homes	26.65	26.34	26.36	79.35
	Past Trends	17.42	26.34	33.28	77.04
	Reduced Out-Commuting	43.54	44.76	55.69	144.00
Supply		10.81	14.77	13.28	38.87
Difference between Supply & Demand	Baseline	1.33	-11.56	-8.38	-18.61
	RSS Scenario - 11,000 New Homes	-12.66	-11.56	-11.97	-36.20
	RSS Scenario - 14,500 New Homes	-15.84	-11.56	-13.08	-40.48
	Past Trends	-6.61	-11.56	-20.00	-38.17
	Reduced Out-Commuting	-32.73	-29.99	-42.41	-105.13

Source: GVA Grimley, 2010

Baseline Scenario

7.5 Under the Baseline Scenario the model predicts a total demand of 57.48ha, of which 9.48ha would be for Offices, 26.34ha would be for Factories and 21.66ha for Warehouses. The total supply of employment land within Nuneaton and Bedworth is 38.87ha. Therefore under the Baseline Scenario there is an overall deficit of 18.61ha. Of this there is a slight surplus of 1.33ha for Offices, a deficit of 11.56ha for Factories and a further deficit of 8.38ha for

Warehouses. Therefore under this scenario we would recommend that the Borough would need to identify further allocations of around 19ha of employment land to meet its requirements, in particular for occupiers of B2 and B8 employment space.

RSS Scenario – 11,000 New Homes

- 7.6 Under the RSS Scenario (11,000 new homes) the model predicts a total demand of 75.07ha, of which 23.48ha would be for Offices, 26.34ha would be for Factories and 25.26ha for Warehouses. The total supply of employment land within Nuneaton and Bedworth is 38.87ha. Therefore under the RSS Scenario (11,000 new homes) there is an overall deficit of 36ha. This comprises a deficit of 12.66ha for Offices, 11.56ha for Factories, and 11.97ha for Warehouses. Therefore under this scenario we would recommend that the Borough would need to identify further allocations of around 36ha of employment land to meet its requirements.

RSS Scenario – 14,500 New Homes

- 7.7 Under the RSS Scenario (14,500 new homes) the model predicts a total demand of 79.35ha, of which 26.65ha would be for Offices, 26.34ha would be for Factories and 26.36ha for Warehouses. The total supply of employment land within Nuneaton and Bedworth is 38.87ha. Therefore under the RSS Scenario (14,500 new homes) there is an overall deficit of 40ha. Of this there is a large deficit of 15.84ha for Offices, 11.56ha for Factories and 13.08ha for Warehouses. Therefore under this scenario we would recommend that the Borough would need to identify further allocations of around 40ha of employment land to meet its requirements.

Past Trends Scenario

- 7.8 Under the Past Trends Scenario the model predicts a total demand of 77.04ha, of which 17.42ha would be for Offices, 26.34ha would be for Factories and 33.28ha for Warehouses. The total supply of employment land within Nuneaton and Bedworth is 38.87ha. Therefore under the Past Trends Scenario there is an overall deficit of 38ha. Of this there is a deficit of 6.61ha for Offices, 11.56ha for Factories and a large deficit of 20ha for Warehouses. Therefore under this scenario we would recommend that the Borough would need to identify further allocations of around 38ha of employment land to meet its requirements.

Reduced Out-Commuting Scenario

- 7.9 Under the Reduced Out-Commuting Scenario the model predicts a total demand of 144ha, of which 43.54ha would be for Offices, 44.76ha would be for Factories and 55.69ha for Warehouses. The total supply of employment land within Nuneaton and Bedworth is 38.87ha. Therefore under the Reduced Out-Commuting Scenario there is an overall deficit of 105ha. Of this there is a deficit of 32.73ha for Offices, 29.99ha for Factories and 42.41ha for Warehouses. Therefore under this scenario we would recommend that the Borough would need to identify further allocations of around 105ha of employment land to meet its requirements.

Summary

- 7.10 In summary, we have identified that across all five scenarios there is an overall deficit of employment land ranging from 19ha under the Baseline scenario to around 105ha under the Reduced Out-Commuting scenario. This includes a deficit of land for offices of between 6.61ha – 32.73ha and for warehouses of between 8.38ha – 42.41ha. There is a deficit of 11.56ha for B2 uses across all scenarios, apart from the Reduced Out-Commuting scenario, where the deficit for B2 is around 30ha. Under the Baseline Scenario there is a slight surplus of around 1.33ha for offices, although overall there is still a deficit.
- 7.11 A preferred scenario should be identified however, this is dependent on the evolving economic vision, which is currently being prepared through the Core Strategy. In identifying allocations of employment land required in order to meet the anticipated demand, it should be borne in mind that our calculations have assumed that the future supply of employment land (shown in Table 7.1) would all be delivered, that longstanding sites remained undeveloped over the Plan period and that no further existing employment sites will be lost to other uses (aside from those shown in Table 4.8). It will therefore be important that the local authority monitors this position closely to ensure that the portfolio of employment land is adequate for the anticipated need.
- 7.12 With regard to the figures set out in the Panel Report of the EiP for the WMRSS Phase 2 Revision, Policy PA7 sets out a requirement for an indication of at least 10 years supply, comprising five years of readily available land (a rolling supply of 32ha) and a further five years indication. A longer term requirement of 128ha to 2026 is calculated, although there is no need to identify the full-long term provision in the preparation of the Core Strategy. The five year rolling supply figure equates to around half the anticipated demand for the Borough for four of the five scenarios, according to our model and therefore in order to effectively plan,

monitor and manage, we would therefore recommend that the local authority monitors this position at regular intervals in order to take account of the changing economic climate.

- 7.13 The next section of this report looks at the potential impact of a Regional Investment Site within Nuneaton and Bedworth.

8. IMPACT OF A REGIONAL INVESTMENT SITE WITHIN NUNEATON AND BEDWORTH

8.1 As required by the Brief we have considered the impact of a Regional Investment Site (RIS) being located within Nuneaton and Bedworth. The Panel Report of the EiP for the WMRSS Phase 2 Revision identifies at paragraph 5.20, confirms the need for a RIS to serve the Coventry and Nuneaton Regeneration Zone (RZ) and at Recommendation R5.10 proposes to amend Policy sub-paragraph E of PA7 as follows:

“New RIS will be required to meet the needs of the following High-Technology Corridors / Regeneration Zones:

- i. *South Black Country and West Birmingham RZ and*
- ii. *Coventry and Nuneaton RZ”*

8.2 A key issue facing the sub-region is the provision of adequate employment opportunities to serve the housing growth that will be accommodated within it. It will be important that a range and choice of sites and premises are available, in locations that are relatively accessible and minimise the need to travel.

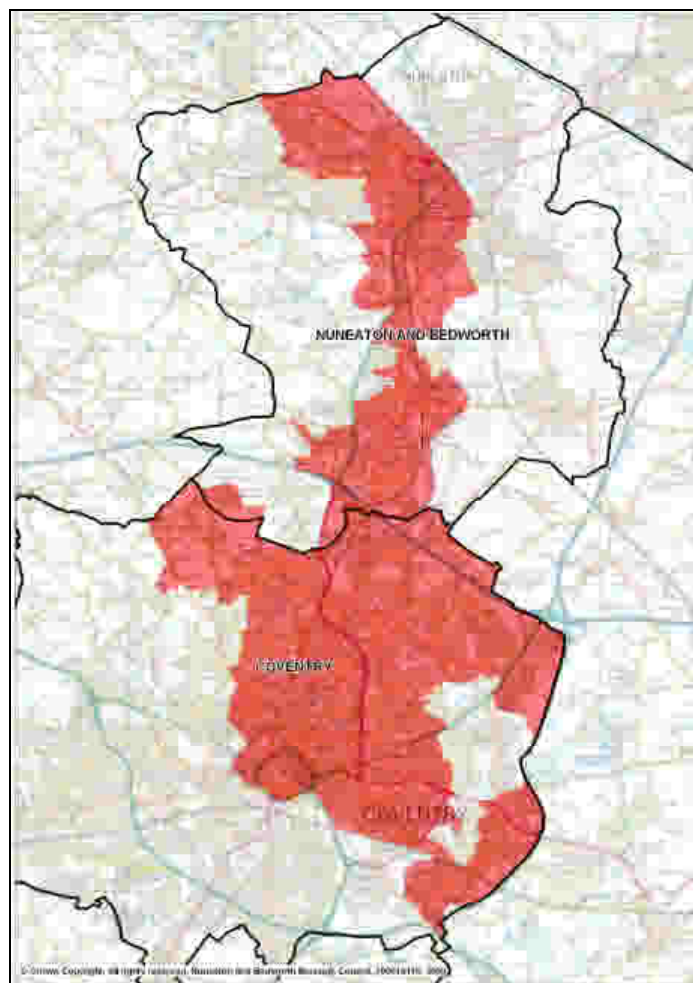
8.3 Policy PA7 of the Regional Spatial Strategy for the West Midlands describes Regional Investment Sites (RIS) as in the order of between 25 and 50 hectares. It also says that at least one RIS should serve each of the Regeneration Zones and High-Technology Corridors that are designated within the region.

8.4 A Regional Investment Sites must meet the requirements of policy PA7 of the WMRSS, this indicates that it must be:

- in the order of 25–50 hectares;
- high-quality sites attractive to national and international investors;
- served or capable of being served by multi modal transport facilities and broadband IT infrastructure;

- possess good quality public transport links, or be capable of having such links provided
 - well related to the motorway and trunk road network;
 - located within, or close to, the areas of greatest need; and
 - accessible to effective education and training opportunities to ensure that the employment benefits are available to the local workforce.
- 8.5 At least one RIS should be made available within or linked by public transport to:
- each of the Urban Regeneration Zones; and
 - each of the High-Technology Corridors.
- 8.6 To meet these criteria, it is considered that the RIS must be within CNRZ as indicated in Figure 8.1 below.

Figure 8.1 - Location of the Coventry and Nuneaton Regeneration Zone



Source: GVA Grimley, 2010

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- 8.7 The Coventry and Nuneaton Regeneration Zone (RZ) is currently served by the RIS at Ansty, which is under construction. Given the accelerated housing provision that is expected of Nuneaton & Bedworth and Coventry, it will be necessary to identify an additional RIS to serve the Regeneration Zone once the Ansty site is nearing completion and occupied. This is also to ensure that any housing growth must be also employment-led, to avoid the settlements such as Nuneaton and Bedworth concerned becoming 'dormitory towns'.
- 8.8 The West Midlands Regional Economic Strategy does set out that the identified Regeneration Zone's "represent concentrations of deprivation and disadvantage within the region; the areas of greatest need and market failure", 84% of the most deprived areas in the region are located in RZ's. It follows that, to regenerate and support the sustainable development and growth of the most deprived areas.

Impact of Locating a RIS within Nuneaton and Bedworth

- 8.9 We have identified from the WMRSS that a RIS could potentially be up to 50ha in size, however after taking advice from Nuneaton and Bedworth Borough Council and Warwickshire County Council officers, we have assumed a potential RIS site size of 30ha.
- 8.10 Our calculations for predicting the impact upon employment are shown in Table 8.1 below. As stated above, we have assumed a 30ha site, with a site coverage (plot ratio) of 40% - which we would consider to be an average figure based on our development experience with other similar sites such as Ansty, Wobaston Road, Birmingham Business Park and Hilton Cross.
- 8.11 We have assumed a split of uses on the site of 5% for ancillary uses, with the remainder being split 50% B1a (offices), 25% B1b (Research & Development), 15% B1c (Light Industrial) and 10% B2 (General Manufacturing) to reflect the policy guidance as set out in paragraph 7.37 of the WMRSS and in the note produced by the NBBC / WCC Economic Development / Town Centres Theme Group (see Appendix N). Employee densities for the different land use types have been taken from the Arups work on Employment Densities: A Full Guide in order to calculate the total employment that could be generated by a RIS site.
- 8.12 In total, we have calculated that a RIS site in the order of 30ha could create around 4,852 jobs, with the majority of these – around 3,000 – being for B1a (offices). A further 983 jobs could be created within the Research and Design land use class, 534 within Light Manufacturing and 335 in General Industrial.

Table 8.1 - Predicted Impact of a RIS on Employment

Total site size	30	ha	
Plot ratio	40%		
Total assumed floorspace	120,000	sq m	

Ancillary Uses		5%	
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Assumed split of Remaining Uses (excl Ancillary)	B1a	50%	
	B1b	25%	
	B1c	15%	
	B2	10%	

Floorspace by use	Ancillary	6,000	sq m
	B1a	57,000	sq m
	B1b	28,500	sq m
	B1c	17,100	sq m
	B2	11,400	sq m

Assumed job densities*	B1a	19	sq m per employee
	B1b	29	sq m per employee
	B1c	32	sq m per employee
	B2	34	sq m per employee

Employment Creation	B1a	3,000	
	B1b	983	
	B1c	534	
	B2	335	
	Total	4,852	

Source: GVA Grimley, 2010

* Employee densities taken from Arups work on *Employment Densities: A Full Guide*

- 8.13 In order to assess the potential impacts of a RIS within the Borough we have looked at a number of factors including transport, the economy and local property market. These are discussed in more detail below.

Transport

- 8.14 Nuneaton and Bedworth lies within the North-South Corridor as defined in the Warwickshire County Council Local Transport Plan (LTP) (2006), with Coventry at the heart of the corridor and links down to Warwick / Leamington Spa in the south and Nuneaton and Bedworth to the north. There are a number of key proposals in this area to improve public transport and accessibility, particularly from Coventry to Nuneaton and Bedworth. These include the LTP

and NBBC Local Plan (Policy T6), which identify a number of potential additional stations on the Nuneaton to Coventry railway line, including one at Bermuda / Griff and the LTP identifies improvements to the existing shuttle service to allow two trains per hour to be operated. This proposal is identified as the highest priority of all public transport schemes within the LTP.

- 8.15 In addition to planned improvements in public transport provision, there are also proposals within the LTP for better management of the M6 Motorway between Junctions 2 and 3 through the implementation of an Active Traffic Management system on this stretch of the motorway to alleviate the current problems with traffic congestion.
- 8.16 There are benefits in locating a potential RIS close to existing, or proposed public transport links and the strategic highway network in order that the site is as accessible as possible, as this will improve its attractiveness to the market. Taking this into account, as well as the transportation proposals outlined above, we would therefore recommend that a potential RIS area of search could be within 1km of Junction 3 of the M6 Motorway. Sites within this area would have the necessary infrastructure support required for it to be successful, as well as placing it at the most appropriate location from a planning and market point of view. Whilst this location could initially attract some demand away from Nuneaton town centre, having an RIS located within the Borough could provide positive spin off effects for the town centre and ultimately lead to an increase in demand.

Economy

- 8.17 A proposal for a RIS within Nuneaton and Bedworth would have a positive effect on the Borough's economy, in terms of providing large scale commercial development that is capable of attracting regional, national and international occupiers, something which at present Nuneaton and Bedworth struggles to achieve.
- 8.18 Other economic advantages of a RIS within the Borough would be the increased supply of employment (particularly of better skilled jobs), the potential to reduce out commuting by the creation of jobs within the Borough and a narrowing of the economic gap between north and south Warwickshire.

Property Market

- 8.19 Both our property market review in Section 3 of this report, and anecdotal evidence from our stakeholder interviews identify that there is currently a dearth of supply of large scale units, with only one currently being marketed (Warehouse 10, Bayton Road Industrial Estate), being over 2,500 sq m. There is also evidence of demand for these units, but the lack of supply of

large units that potential investors with large scale requirements have no option to locate within Nuneaton and Bedworth. A RIS could provide some medium - large scale accommodation for light / general uses, particularly units in the order of 2,500 sq m – 5,000 sq m (27,000 sq ft – 54,000 sq ft), which could attract businesses within the high quality manufacturing sectors that Nuneaton and Bedworth is trying to attract. Our model for an RIS shows that it could provide around 28,500 sq m of B1c / B2 floorspace, which would be capable of supporting around 870 jobs in key growth sectors.

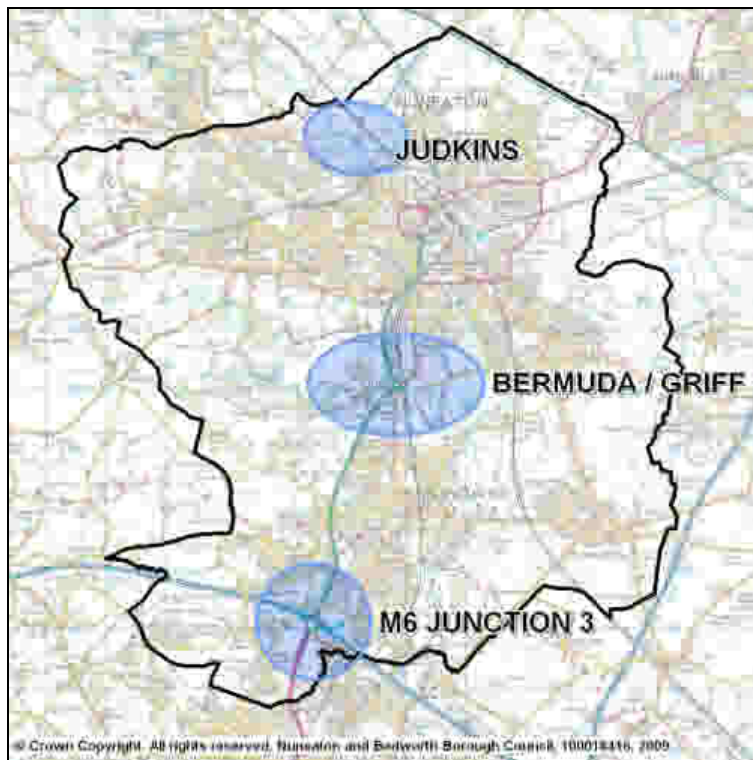
- 8.20 Demand for these larger scale units is likely to come from outside Nuneaton and Bedworth, although there are several existing occupiers at Bermuda who accommodate units in the order of 2,500 sqm, who may be looking to relocate in the future.
- 8.21 In terms of offices, the RIS could provide a significant amount of office space - around 57,000 sq m (615,000 sq ft) according to our model, which would make the RIS one of the key office locations in the sub-region, along with the proposed site at Ansty. This may have an adverse effect on Nuneaton town centre, and the local authority would need to ensure that the RIS does not detract from the emerging office market that they are currently trying to create there through projects such as the Justice Centre development and that the town centre office floorspace growth targets set out in Policy PA11a of the WMRSS are not compromised. The RIS would therefore need to be carefully marketed in order to ensure that it has the correct commercial appeal to the market to attract the sectors that are desired. As stated above, the careful management of a potential RIS could lead towards office growth being attracted towards Nuneaton town centre, rather than being deflected away from it.

Potential Locations for a RIS in Nuneaton and Bedworth

- 8.22 We have reviewed the sites submitted as part of NBBC's Strategic Land Availability Assessment (SLAA), which was undertaken in 2008, to identify those that are suitable for employment and furthermore, which could be a potential location for a RIS.
- 8.23 Our area of search has focussed on three key areas within the Borough; the area north west of Nuneaton town centre around Judkins, the Bermuda / Griff area, and around Junction 3 of the M6 motorway. These locations are suitable for a RIS due to their attractiveness to the market, deliverability potential, environmental characteristics, market profile, accessibility, sustainability, strategic access to key roads and location in terms of other employment uses. Other potential locations such as to the north of the town centre, close to the A5 have been discounted due to their market profile and relatively poor access, in particular to the strategic highway network.

8.24 The broad areas of search for potential RIS sites are shown in Figure 8.2 below.

Figure 8.2 – Areas of Search for Potential RIS Sites

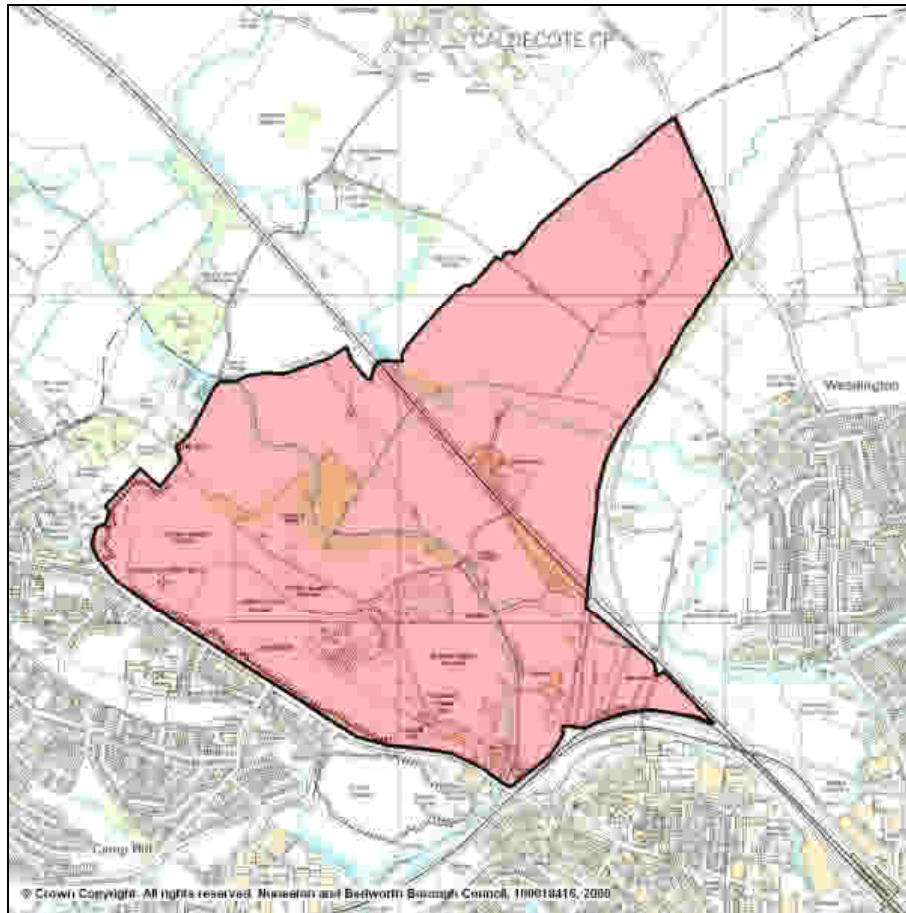


Source: GVA Grimley, 2010

Judkins

8.25 The former quarry site at Judkins and surrounding operational land extends to almost 190ha and therefore represents one of the largest redevelopment projects in the Borough. This is shown in Figure 8.3 below. Our property market review has shown that this part of the Borough is not the most attractive to prospective occupiers, primarily due to its location and access from M6, which requires a journey around Nuneaton town centre. There has been a considerable amount of work undertaken to date examining the redevelopment viability of the Judkins site, most notably work commissioned by AWM and the Waste Recycling Study (July 2009), which details likely options for the site moving forward as part of the NBBC Core Strategy consultation. This work has indicated that due to the extensive remediation works required to bring the site forward, its redevelopment as employment only is unviable, and that a maximum of 15ha employment would be achievable on the site. Taking this into account, we feel that the site does not represent a viable opportunity for a RIS site (which would need to be a minimum of 25ha in accordance with Policy PA& of the WMRSS), and therefore we have discounted Judkins as a potential RIS site.

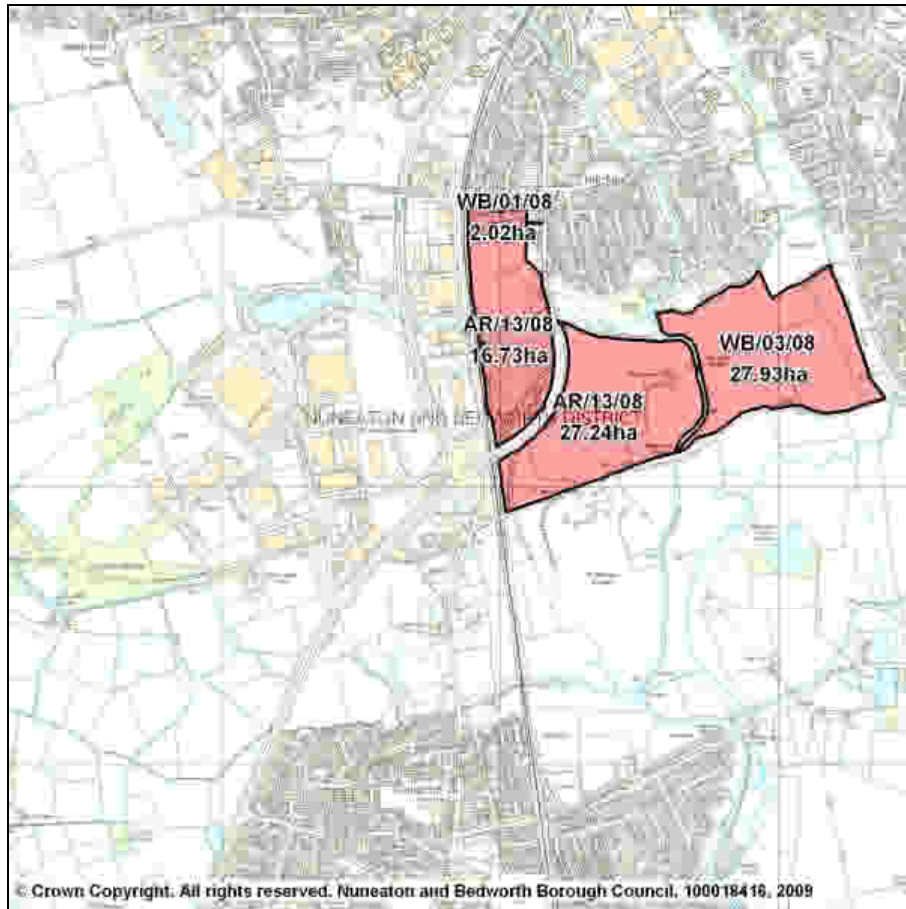
Figure 8.3 - Potential Location for a RIS in Nuneaton and Bedworth (at Judkins)



Source: GVA Grimley, 2010

Bermuda / Griff

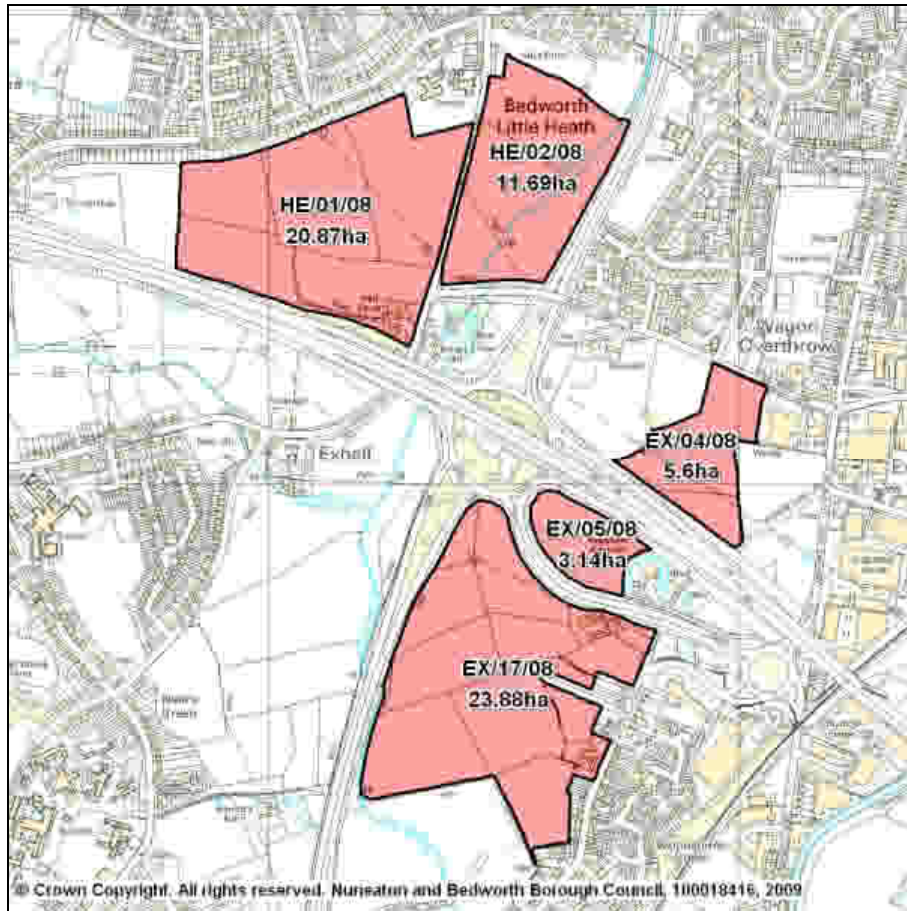
- 8.26 In the case of Bermuda / Griff, this is seen as a key employment area both in planning and property market terms and the existence of numerous medium – large employers at places such as Bermuda Business Park has already created a critical economic mass that can be built upon through the creation of further employment areas. We have identified a number of potential sites, shown in Figure 8.4 below and reviewed land ownership details for these particular sites which are presented in Table 8.2 below.

Figure 8.4 - Potential Locations for a RIS in Nuneaton and Bedworth (Bermuda / Griff)

Source: GVA Grimley, 2010

M6 Junction 3

- 8.27 Taking into account our discussions in paragraph 8.16 above, we have identified a number of sites within 1km of Junction 3 of the M6 Motorway, which could be suitable for a RIS. These are shown in Figure 8.5 below. We have also reviewed land ownership details for these particular sites which are presented in Table 8.2 below.

Figure 8.5 – Potential Locations for a RIS in Nuneaton and Bedworth (M6 Junction 3)

Source: GVA Grimley, 2010

- 8.28 From looking at Figure 8.5 above there appears to be two main locations at which a RIS could be developed. These are located south east of Junction 3 (EX/05/08 and EX/17/08) and north of Junction 3 (HE/01/08 and HE/02/08). There is a third location to the north east of the junction, which comprises site EX/04/08, however this site is separated from other potential areas of development by the M6 Motorway and therefore we feel that this site would not be able to support a RIS site on its own.

Table 8.2 - Details of Potential RIS Locations

Reference	Site Size	Current Use	Market Interest		Potential Constraints to Development			Site Availability			
			Interest	Comments	Type	Nature & Severity	Action Needed, Timescales & Progress	When Site Available	Year Commence	No. of Years to Develop Site	Phasing
BP/04/08 (previously WB/02/08)	1.21Ha	Vacant Land	Enquiries received	The site has not yet been formally marketed. However, British Waterways has received several unsolicited enquiries from residential developers.				Immediately	Between April 2009 and March 2010	2	
WB/03/08	28.01Ha	Agricultural	Site is owned by a developer		Topography or Ground Conditions	Eastern and northern margins of the site (only) are at risk of flooding (as identified on the Local Plan Proposals Map)	Action Needed - Development would avoid those margins of the site.	Within the next 4 years (2008 - end of March 2012)	Between April 2010 and March 2011	5	
HE/01/08	20.93Ha	Agriculture	Enquiries received and Site is being marketed								
HE/02/08	11.73Ha	Agriculture	Enquiries received and Site is being marketed		Topography or Ground Conditions	A stream runs through the site		Immediately	Between April 2008 and March 2009	3	

Reference	Site Size	Current Use	Market Interest		Potential Constraints to Development			Site Availability			
			Interest	Comments	Type	Nature & Severity	Action Needed, Timescales & Progress	When Site Available	Year Commence	No. of Years to Develop Site	Phasing
EX/17/08	23.95Ha	Residential gardens and agricultural land	Site is under option to a developer		Topography or Ground Conditions/ Electricity	Topography:- Small part of site within Area at Risk from Flooding. Electricity:- Pylons within northern part	Topography:- Action Needed - Flood Risk Assessment, Timescale - To be produced summer 2008. Electricity:- Action Needed - To be retained.	Immediately	Between April 2008 and March 2009	5	
EX/05/08	3.15Ha	Grassland	Enquiries Received	Site has not yet been marketed but will be				Within the next 4 years (2008 - end of March 2012)	Between April 2009 and March 2010	2	Phasing not necessary
EX/04/08	5.62Ha	Agriculture	None	Site has not yet been made available - but will be	Electricity	High capacity overhead lines cross site.	Action Needed - Reroute or avoid	Within the next 4 years (2008 - end of March 2012)	Between April 2010 and March 2011	3	Phasing not necessary

Source: NBBC SLAA, 2008

- 8.29 The other three locations all have the necessary capacity to support a RIS of around 30ha in total and from reviewing the information presented in Table 8.2 above, they appear to have willing sellers, some of whom are already starting to market their land for development. We would advise that additional work is required to explore the viability of the areas of potential development land around the motorway junction, in order to ascertain a magnitude of costs and values to develop the land and bring it to the market.

Delivery and Strategy

- 8.30 In terms of policy recommendations for the emerging Core Strategy, we would recommend that the Council makes an allocation of at least 30ha for a Regional Investment Site within the Borough, and that further work will be required in order to determine its preferred location. Looking to the experience of other RIS in the UK, a key factor in attracting occupiers is the establishment of clear delivery strategy and mechanism (involving a range of key partners) to stimulate technological innovation and attract new businesses. We would therefore recommend that a Delivery Strategy is produced which sets out the levels of public sector intervention required, an appropriate mix of uses upon the site, a programme of delivery, development of a business plan including a scheme of management and a site identity and marketing strategy in order to attract the highest quality investment and development to the site.

Impact of Locating RIS Outside Nuneaton and Bedworth

- 8.31 The brief requires this report to also look at the impact of locating the RIS outside Nuneaton and Bedworth. The Panel Report from the WMRSS EiP has identified that the CNRZ requires that a RIS is located within its boundary, shown in Figure 8.1 above, therefore locating it outside Nuneaton and Bedworth would mean that a RIS would be located within Coventry, either to the north or east of Coventry city centre. There would be a number of negative impacts for Nuneaton and Bedworth if this were to occur, which are set out below:
- There would be an increased supply of skilled employment outside the Borough, which could lead to further out-commuting, which is already an issue for Nuneaton and Bedworth (shown in Table 2.10);
 - The economic gap between north and south Warwickshire could widen given the existing relationship between Coventry and the south of the County;
 - The development of a RIS in Coventry could attract potential investors away from Nuneaton and Bedworth, and lead to an increase in vacancy rates;

- The potential spin off effects of a RIS, such as the attraction of further investment opportunities from the public and private sector would be directed elsewhere outside the Borough; and
 - The limited supply of available development land in Coventry could mean that locating a RIS there would push other types of development, such as housing, into Nuneaton and Bedworth;
- 8.32 The next section of this report reviews the areas of potential employment growth within Nuneaton and Bedworth Borough.

9. FUTURE DIRECTION OF EMPLOYMENT LAND GROWTH

9.1 In this section we consider and recommend future areas of employment growth within Nuneaton and Bedworth. In coming to these recommendations we have taken the following into account:

- Emerging policy work prepared by NBBC officers;
- The suitability of sites for employment uses;
- The attractiveness of sites from a market perspective; and
- The views of stakeholders interviewed as part of the ELR process.

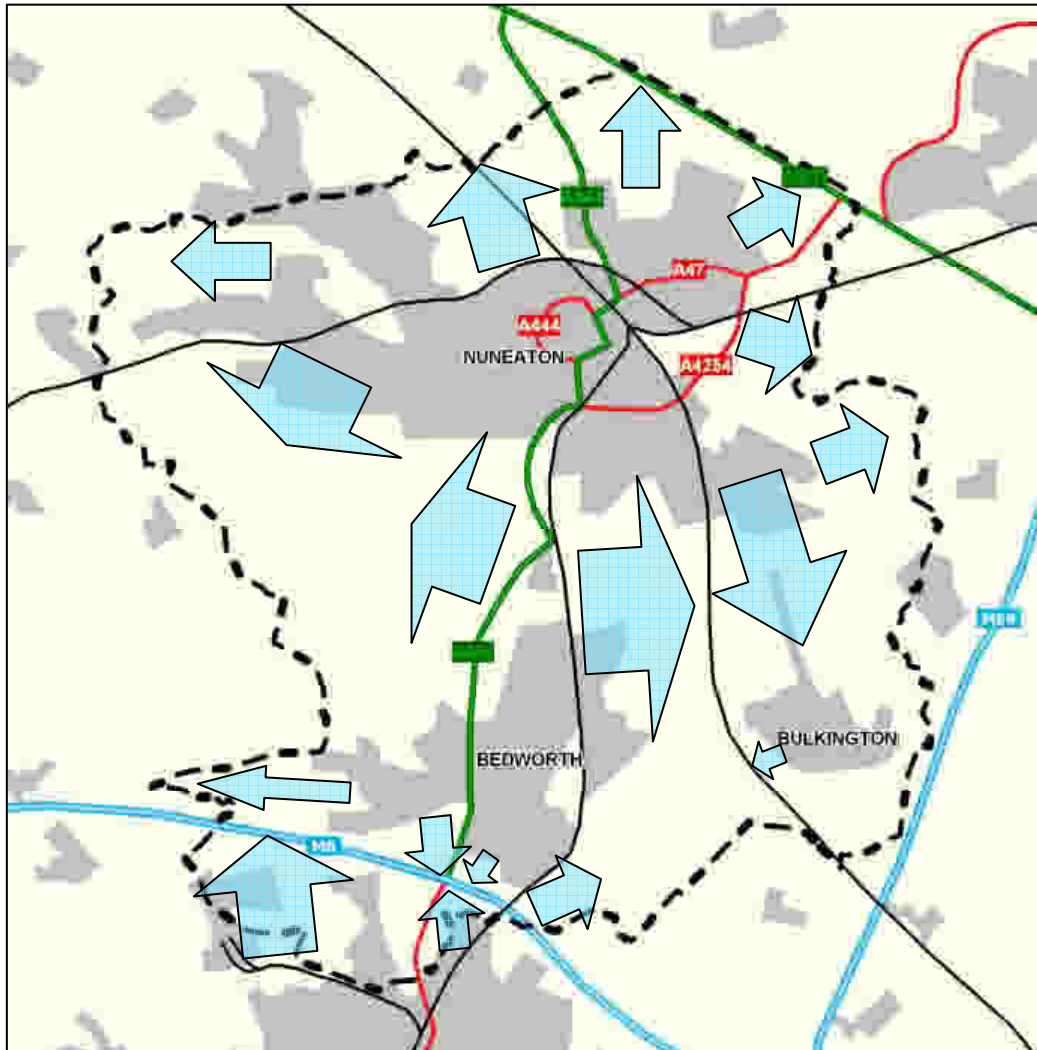
9.2 Section 7 of this report highlighted a further requirement of around 12.66ha of land suitable for offices to accommodate predicted demand up to 2026. This is based on the RSS scenario with 11,000 new homes over the plan period. There also needs to be some consideration given to the housing supply needs of Coventry, some of which will need to be accommodated within Nuneaton and Bedworth.

9.3 As part of the preparation of the NBBC Local Development Framework, officers have produced the Core Strategy Issues and Options Paper, which was released for consultation in May 2009 and sets out the framework for a spatial strategy that seeks to identify:

- The key issues facing the Borough;
- The future planned growth of the Borough, as set out in the RSS;
- A draft vision for the Borough which summarises what the Council want Nuneaton and Bedworth to be like in 2026;
- Objectives to deliver that vision and address the issues; and
- A range of realistic spatial options capable of delivering the vision and objectives.

9.4 As part of the consideration of a number of options for growth in the Borough, a total of 10 spatial growth scenarios have been identified, each proposing different possible directions of growth. We have summarised these directions of growth into Figure 9.1 below.

Figure 9.1 – Potential Directions of Future Growth within Nuneaton and Bedworth



Source: NBBC Core Strategy Issues and Options and GVA Grimley analysis, 2009

9.5 Figure 9.1 above shows that NBBC have considered the main potential directions of growth to be focussed around the urban areas of Nuneaton, Bedworth, Bulkington and north of Coventry. We have reviewed the potential impacts upon the economy for each of the options and identified where an option could have a positive or negative effect on the Borough's economy. This is shown in Table 9.1 below.

Table 9.1 - Predicted Impacts Upon the Economy of Core Strategy Spatial Options

Spatial Option		Predicted Impact upon Economy	Comments
Sequential Approach		Positive	Older employment sites in the existing urban area would be modernised and new employment sites in the countryside would be attractive to developers because of accessibility to the A5 and motorway network
North / South Corridor		Positive	Directing development to areas of existing employment will enable the modernisation of older sites. New employment opportunities would be directed to localities where they are most needed.
Focus Growth in Nuneaton	North of Nuneaton	Neutral	The location would be attractive to developers because of the proximity to the A5 and onward links to the motorway network, however development would be located away from areas where job opportunities are most needed.
	East of Nuneaton	Negative	Development would be located away from areas where job opportunities are most needed.
	West of Nuneaton	Positive	Employment opportunities would be directed to a locality where jobs are needed.
Focus Growth in Bedworth		Positive	Directing development to areas of existing employment will enable the modernisation of older sites. New employment opportunities would be directed to localities where they are most needed.
Small Urban Extensions		Negative	Dispersed development is unlikely to deliver the step change that is required to improve the Borough's economy. The overall image of the Borough would remain unchanged.
Land South of M6 Motorway		Positive	There would be benefits from links to existing employment such as Prologis and the Ricoh. Accessibility to the M6 would make the area attractive to developers. New employment opportunities would be directed to localities where they are needed.
Land North of M6 Motorway		Positive	There would be benefits from links to existing employment such as Prologis and the Ricoh. Accessibility to the M6 would make the area attractive to developers. New employment opportunities would be directed to localities where they are needed.
Land North and South of M6 Motorway		Positive	There would be benefits from links to existing employment such as Prologis and the Ricoh. Accessibility to the M6 would make the area attractive to developers. New employment opportunities would be directed to localities where they are needed.

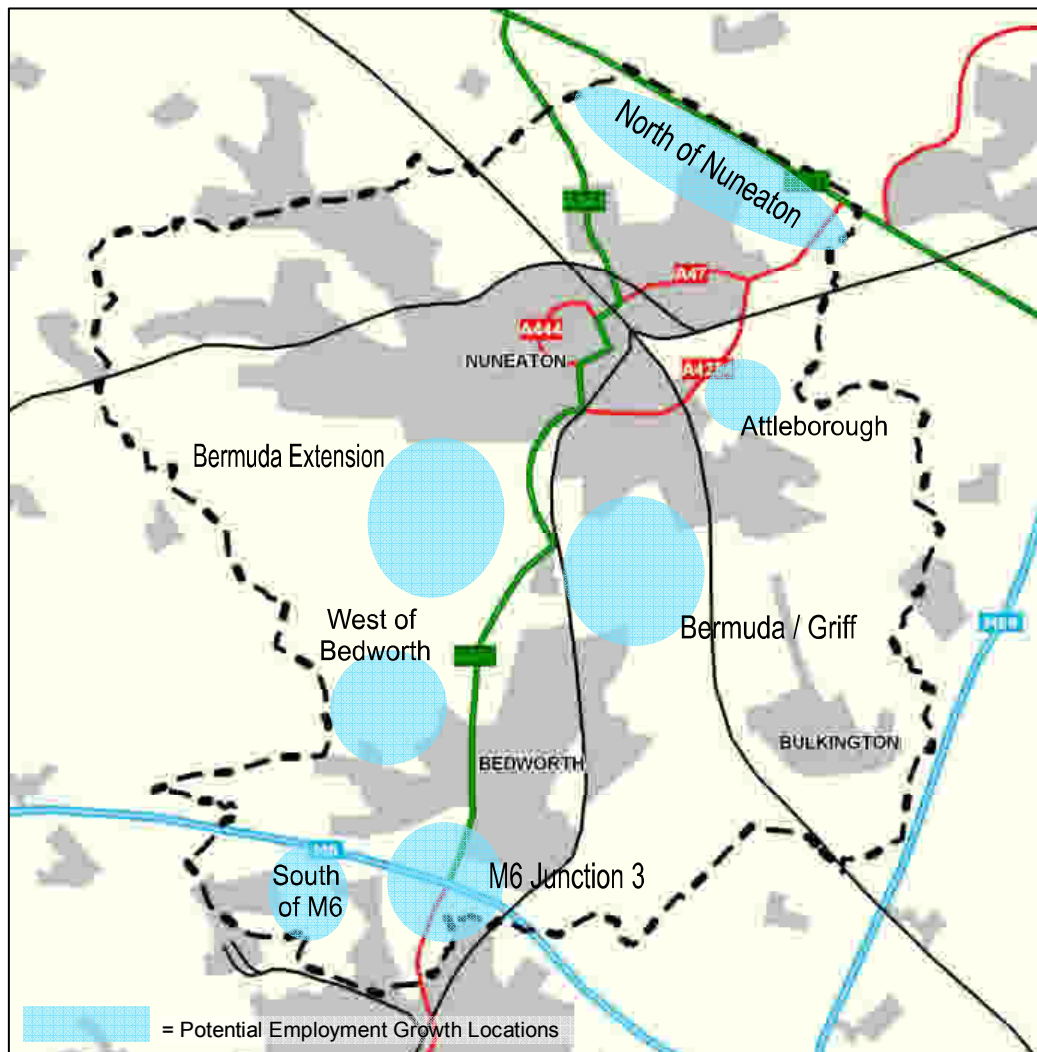
Source: NBBC Core Strategy Issues and Options, 2009

9.6 Using the potential directions of growth and impacts upon the economy as a starting point we have sought to identify broad areas of land (not specific sites at this stage) that would be suitable for employment use from a planning, physical, market and sustainability point of view. We have also used the knowledge we have gained from interviewing stakeholders (such as County Council officers, local agents and inward investment agencies) to focus on the most suitable locations for employment growth.

9.7 It is important to consider the characteristics of such sites when proposing allocations. These in our view are:

-
- **Location** – agents have identified that employment sites should be well located with regard to existing areas of employment activity, and the major highway network. In addition, sites should be located having regard to surrounding land uses (e.g. existing employment and residential);
 - **Strategic Access** – agents have identified that sites having a drive time of less than 10 minutes to the major highway network (e.g. the M6, A444 and A5(T) corridors) will be more attractive for businesses who wish to locate themselves out of town;
 - **Sustainability** – new locations for employment should be located close to existing services and amenities, and in terms of public transport, they should be located in locations that are close to public transport networks in order to reduce the reliance on the use of the private car. The ability to access sites by road but also by public transport is important and increasingly so. Labour markets and the ability to attract and retain employees are a key consideration for occupiers;
 - **Profile and Accessibility** – occupiers generally prefer sites with visibility and good access by road;
 - **Environment** – a key driver for office occupiers is the environmental quality of the site and surrounding area. Whilst larger sites can to some extent create their own environment, the approach to a site will clearly have a bearing on market demand;
 - **Deliverability** – whilst at the development plan stage it is difficult to undertake a detailed analysis on assessment of constraints to development, both offsite and onsite assessments should be undertaken as part of identifying individual sites. New employment locations must be viable for development in order that the market will bring them forward. In identifying potential sites for development it is important to take in account the potential costs of development (e.g. demolition, flooding, access, remediation); and
 - **Attractiveness** – sites that will be attractive to the market will have greater potential for development. This takes account of the factors highlighted above, but also regional and sub-regional factors such as the CSW HTC and investment corridors.

9.8 We have identified a total of seven locations within the Borough, that could be viewed as potential areas for employment growth. These are shown in Figure 9.2 below.

Figure 9.2 - Potential Locations for Employment Growth within Nuneaton and Bedworth

Source: GVA Grimley, 2010

9.9 Taking each of the locations in turn, we highlight their characteristics below.

North of Nuneaton

9.10 This area provides excellent access to the A5(T) and in turn to the wider motorway network of the M69, M1 and M6. This would make it attractive in market terms to a wide range of potential occupiers, including those in the light and general industrial, and distribution sectors. In planning terms this area is classed as open countryside, but is outside the Greenbelt, and therefore would be attractive to prospective developers in terms of having lower development costs and being outside of the area of Greenbelt restraint. There would also be potential for sites within this area to have some frontage on to the A5(T), which would provide high profile sites and be attractive to potential occupiers. However, development here is likely to increase

traffic flows through Nuneaton town centre, due to additional traffic from south of the town centre making journeys northwards. There will also be a negative impact on the existing Air Quality Management Areas (AQMAs) within Nuneaton town centre and increased pressure on public transport services.

- 9.11 The key issues to consider with this area would be related to the likely increases in traffic flow and associated environment impacts, access via public transport, the relationship with the areas of residential to the south west, and socio economic impacts, as this area was identified by NBBC as being located away from where job opportunities are needed.

Attleborough

- 9.12 Attleborough is located to the east of the town centre, and offers good access to the A5(T) via The Long Shoot, making it attractive to potential occupiers, proven by the relative success of existing sites such as Attleborough Fields Industrial Estate. We feel that there is potential in this area for some expansion of the existing employment areas to accommodate further employment development and that demand in this location is likely to be for small to medium sized occupiers. However, development here is likely to increase traffic flows through Nuneaton town centre, due to additional traffic from south of the town centre making journeys towards Attleborough. There is also likely to be a significant impact on residential areas due to increased traffic flows, particularly on the A4254 and surrounding roads and increased pressure on public transport services.
- 9.13 The key issues to consider with this area would be the fact that much of this expansion area is classified as Green Belt and therefore any development in this area would result in the loss of this valuable resource. There would also be issues related to local access for individual sites, environmental / landscaping issues, and socio economic impacts, as this area was identified by NBBC as being located away from where job opportunities are needed.

Bermuda Extension

- 9.14 Bermuda is one of the key employment locations within the Borough, and therefore any additional employment land provided here is likely to be attractive to the market, due to the existing critical mass of commercial activity in the vicinity. The area offers excellent access to both Nuneaton town centre (and the range of facilities it offers) as well as the M6 motorway network via the A444. We feel that there are opportunities for expansion to the west in this area, although this would need to be developed in line with supporting infrastructure, as the road network in this part of the Borough is limited, particularly to support large scale

commercial development, and there would need to be improvements to public transport infrastructure.

- 9.15 The North South Corridor has been identified as a positive option for growth within the Core Strategy Issues and Options. It is recognised that this corridor provides an excellent opportunity for commercial development and it aligns well with recent highway improvements such as the recently re-modelled Griff roundabout and transport proposals such as the proposed railway station at Bermuda. This would help to improve the overall sustainability of this location in transport terms, however there would also need to be improvements to other modes of transport such as facilities for cyclists between Attleborough and Bermuda.

Bermuda / Griff

- 9.16 The Bermuda / Griff area is located adjacent to Bermuda, on the east of the A444 and comprises a mix of existing employment, a former quarry site and open land. Its location on the A444 makes it attractive to potential occupiers, offering fast access to the M6 motorway, as well as Nuneaton town centre. Despite this, there has been little development at Griff, with the only existing units being those along St Georges Way. We have identified this area as a potential location for a RIS, but it would also be suitable for employment development to contribute towards the needs of the Borough. Were the RIS to be located at Griff, this would improve the attractiveness of this area to the market considerably.
- 9.17 The main issues to consider in this area are access locally from the A444 / B4113 and the viability of brownfield sites such as the former Griff Quarry for redevelopment as employment. On the latter point we would highlight the example of Judkins Quarry, located to the north of the town centre, which has taken some 15 years to be developed and a scheme for this site is still in the process of being drawn up.

West of Bedworth

- 9.18 The area west of Bedworth relates to the area known as Bedworth Woodlands. This area has seen no significant employment development recently and currently the area west of Bedworth lacks the market prominence that is apparent in areas such as Bayton Road, Bermuda, Griff and Attleborough Fields. Development in this area would provide employment floorspace in an area where this is currently limited. Hence in market terms, this area is not as desirable as others in the Borough, however this area would provide employment land where it is most needed and respond to social / economic deficiencies that currently exist.

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- 9.19 The area is mostly Green Belt and therefore any development here would require a release of Green Belt land. There are also issues around the relationship between potential employment and the existing surrounding uses, which are predominantly residential, protected areas of woodland and farmland. These relationships would need to be explored to ensure there was no negative impact on the surrounding uses if employment were developed in the area. In addition there would need to be a direct access from the A444 to ensure that any impacts on residential areas are minimised and would also require access to area via public transport to be improved.

M6 Junction 3

- 9.20 The area around Junction 3 of the M6 motorway represents an excellent opportunity for employment development, particularly with the excellent access to the motorway network which makes this a very attractive location for potential investors. We have also highlighted this area as being a potential location for a RIS and there are a number of potential sites highlighted in Figure 8.5, which would be suitable for employment development.
- 9.21 The key issues to consider with employment development being located adjacent to the motorway junction would be the local access arrangements, the area's relative unsustainable location and the potential to pull the economic focus of the Borough away from the two main centres (Nuneaton and Bedworth). In addition, the area would need to be linked to the transport proposals for the North-South Corridor (such as the NUCKLE) in order to improve access via public transport. These issues would need to be investigated more thoroughly as part of any future development proposals.

South of M6

- 9.22 The area south of the M6 motorway offers potential benefits from links to existing employment such as Prologis and the Ricoh and the excellent accessibility to the M6 would make the area attractive to potential developers. The key issues with this area are that any employment development here would be more closely related to Coventry, and could end up serving Coventry's needs rather than those of the Borough. It would be important that any future employment development in this location considers how it would be able to attract employees from north of the M6, as well as from Coventry. In addition, development here would require a direct access from the A444, in order to ensure any impact on the surrounding residential areas was limited, and there would need to be improvements to public transport provision in the area.
- 9.23 The next section of this report provides our conclusions to the Study

10. CONCLUSIONS

10.1 This section concludes the employment land review and addresses key points of the Brief. We review the following key issues:

- Overall Employment Land Requirements;
- Growth in Town Centres;
- Future Directions of Growth;
- Monitoring and Review;
- Viability, Intervention and Delivery; and
- Funding.

Overall Employment Land Requirements

10.2 We have focussed our analysis and recommendations on the RSS scenario, based on 11,000 new homes being delivered within Nuneaton and Bedworth. The additional employment land requirements (on top of those sites that are already identified in the supply) are set out below in Table 10.1.

Table 10.1 – Additional Employment Land Requirements to 2026

Scenario	Additional Requirement (ha)		
	B1a / B1b	B1c / B2	B8
RSS Scenario – 11,000 New Homes	12.66	11.56	11.97

Source: GVA Grimley analysis, 2009

10.3 Our conclusions from the above are that:

- There is a potential deficit of around 23.54ha of land suitable for the development of general industry / distribution and a further 12.66ha of land suitable for offices that is already committed / allocated in the current Local Plan to accommodate demand within these sectors;
- There is a potential additional supply of employment land from longstanding sites of around 5.76ha, which if they were all to come forward, would reduce the deficit within the Borough to around 30.44ha ; and

- Beyond this, there is an identified requirement for additional employment land over and above existing allocations / proposals. Should existing sites within the portfolio be lost to other uses or fail to come forward, additional land will be required.
- 10.4 Taking this into account, it is our opinion that in preparing its LDF, the Borough Council should seek to identify at least a further 30-36ha of employment land.

Growth in Town Centres

- 10.5 This study has highlighted the potential growth in floorspace requirements in town centres including both the retail (A1-A3) and office (B1a) use classes (see Table 5.10). GVA Grimley understands that a Town Centres Study is currently being undertaken on behalf of Nuneaton and Bedworth Borough Council. We would advise that the figures produced as part of this study (particularly relating to retail) are compared with the emerging Town Centres Study to ensure a consistent and robust programme of growth for the town centre.

Future Directions of Growth

- 10.6 We have identified a total of seven general locations that could be suitable for future employment land use. These are:
- North of Nuneaton;
 - Attleborough;
 - Bermuda / Griff;
 - Bermuda Extension;
 - West of Bedworth;
 - M6 Junction 3; and
 - South of M6.
- 10.7 We have summarised some of the key characteristics of these areas, both in terms of their attractiveness to the commercial market and planning policy at Section 9. Below, we have ranked these broad areas, based on their ability to fulfil the criteria outlined at paragraph 9.7, where 1 represents the best ranking area and 7 the poorest ranking area.

Table 10.2 – Ranking of Broad Future Employment Areas

	Location	Strategic Access	Sustainability	Profile and Accessibility	Environment	Deliverability	Attractiveness
North of Nuneaton	6	5	5	5	6	5	6
Attleborough	5	7	1	6	3	4	=4
Bermuda / Griff	4	4	3	4	5	6	=4
Bermuda Extension	3	3	4	3	1	3	=2
West of Bedworth	7	6	2	7	7	7	7
M6 Junction 3	1	1	6	1	4	1	1
South of M6	2	2	7	2	2	2	=2

Source: GVA Grimley analysis, 2010

- 10.8 Based on the analysis above, the area around Junction 3 of the M6, South of the M6 and the Bermuda Extension rank as the most attractive both in market and planning terms and we would urge the local authority to consider identifying sites suitable for office development within these areas.
- 10.9 The areas at Attleborough and north of Nuneaton would suit small to medium scale employment development, whilst we see Bermuda / Griff as a potential RIS location.
- 10.10 The area west of Bedworth is more challenging, and whilst we anticipate that some demand may exist around Bedworth, this area is unlikely to be suitable for employment due to the poor accessibility, lack of prominence and existing critical mass of employment. Based on our assessments, we would not advise the local authority to pursue identification of employment sites in the West Bedworth area.

Monitoring and Review

Review of Employment Sites

- 10.11 Given the complexity of issues on many of the employment sites within the portfolio it will be important to review the employment land supply at regular intervals, preferably within the context of the annual monitoring report. Assumptions regarding the supply of employment land including the potential yield of employment land from mixed use sites should be addressed as part of this review.
- 10.12 We would also recommend that a monitoring regime for the future take up of employment land is put in place by NBBC in order to effectively plan, monitor and manage the employment land

supply in the future. This regime should be undertaken on an annual basis and look to assess the supply of employment land at five yearly intervals in order to ensure that the rolling supply is maintained. The rolling supply should include within it, an analysis of the supply of readily available land, which we describe in more detail below.

Monitoring a Supply of Readily Available Land

10.13 Our analysis looks at the total demand for employment floorspace and land to 2026. In order to ensure that businesses have a range of locations to choose from and that the employment land supply is flexible (in line with PPS4), we would advise that a test of readily available land is used as a more refined analysis and also to inform development control decisions.

10.14 Readily Available Land can mean different things, and may mean simply being actively marketed, evidenced by sign boards, preparation of particulars. At a broader level, it could include other aspects such as sites with planning consent or sites with no apparently physical obstacles to development such as remediation, access. The West Midlands Regional Employment Land Study defines Readily Available Land as meeting all of the following conditions:

- No major problems of physical condition;
- No major infrastructure problems; and
- On the market with a willing seller.

10.15 This, in our view, is a reasonable definition. With regard to the word “major” as a term we would regard this as the constraint being capable of being addressed and removed within 12 months. This includes gaining planning consent (if required) and undertaking the works required. Therefore if a site needs a new access road for which no planning consent had been submitted and the works would take in excess of 9 months to complete, this would fall outside the definition of a readily available site.

Viability, Intervention and Delivery

10.16 This report has assumed that all of the future supply of employment land will come forward over the Plan period to 2026. We have also identified a number of potential future locations for employment growth to meet the anticipated demand. We would suggest that the local authority undertakes a study of a sample of employment sites to ensure that they are deliverable both in planning and economic terms. This could include a broad assessment of costs required for improvements to access, flood mitigation measures, contamination and

demolition. This would provide the local authority with a more robust evidence base when identifying individual sites for future employment use within the Borough.

10.17 We would recommend a Delivery Strategy is developed which will clearly show where development will happen and those responsible for making it happen. The purpose of this Strategy will be to promote individual site allocations at the local level, setting out an appropriate mix of uses for each site, analysis of development viability (including costs for acquisition, demolition, remediation, infrastructure and building), levels of public sector intervention required and a programme of delivery including quick win sites that are deliverable in the short term, as well as those in the medium to longer term.

10.18 We see there a number of mechanisms which the public and private sectors can utilise to enable development including:

- **Land Assembly** – One of the key issues in delivering available employment land is the cost value gap for employment development. Market values, except in the prime locations, tend to be low and the costs of servicing this land can be extensive (particularly when creating serviced plots for smaller companies). This includes across roads, services, landscaping and ground engineering / remediation. In many cases the costs and uncertainty of land development for employment uses where take up / disposal will be a slow process makes such development uneconomic to the private sector. The public sector can help bring forward sites by acquiring sites through negotiation or using CPO powers if necessary. In addition, the public sector can help to facilitate landowner agreements where sites are in multiple ownership ensuring value is as equitable as possible;
- **Mixed Use Development and Phasing** – By designating mixed use allocations on specific sites can enable their development and lead to the development of higher quality, modern premises however, in the past land set-a-side for employment has often not been brought forward. Therefore it is important to assess whether a mixed use scheme is appropriate, alongside the appropriate quantum of employment land and related phasing of development. One such example within Nuneaton is the Judkins site. We would suggest that the development of employment land should be prioritised as far as possible for the early phases of development and needs to be in the correct locations (e.g. on the road frontage). Assessing the viability of potential mixed use sites should establish their suitability, appropriate mix, volume of each use and development phasing; and
- **Existing Stock** - Intensification, redevelopment and refurbishment are the three key mechanisms for bringing under utilised / vacant stock back into use. This could include

the subdivision / conversion of older existing premises that would otherwise be vacant to provide smaller units, which has been identified through our review of the property market as being one of the key deficiencies in the local economic market. In addition, existing buildings may no longer be “fit for purpose”, therefore through redevelopment or refurbishment, it may be possible to provide modern business premises that will meet the requirements of modern occupiers.

Funding

10.19 There are a number of funding streams that can help to enable development of employment land:

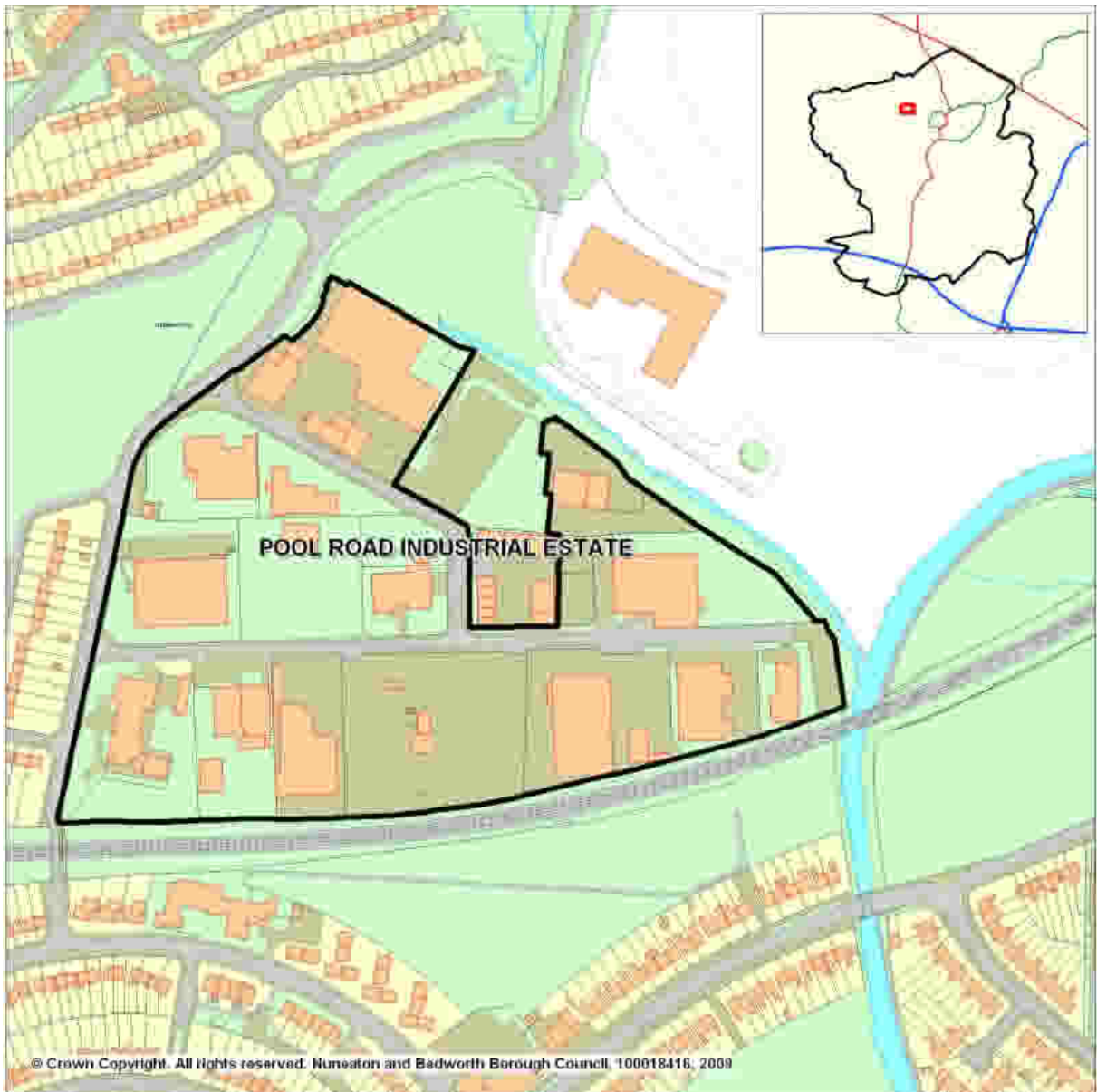
- **Section 106 contributions and the Community Infrastructure Levy (CIL)** can provide the funding towards servicing of and access to employment land. However in the first instance value has to be created by other forms of development to enable the contribution to be possible within the context of a viable scheme;
- **Local Asset Backed Vehicles (LABVs)** involve a shareholder business plan for the partnership as a whole and property / project specific business plans. LABVs lever significant private sector investment via attractive partnership structures based upon income generating local authority assets; and
- **Joint Ventures** are capable of capturing development (value) on public sector-owned sites, but funding needs to ring-fenced to be used to deliver sustainable growth. The basic principle is the local authority provides the land and the developer partner the expertise and investment to deliver employment floorspace.

APPENDIX A – DETAILED EMPLOYMENT SITE PLANS

E1 - Pool Road Business Centre



E2 - Pool Road Industrial Estate



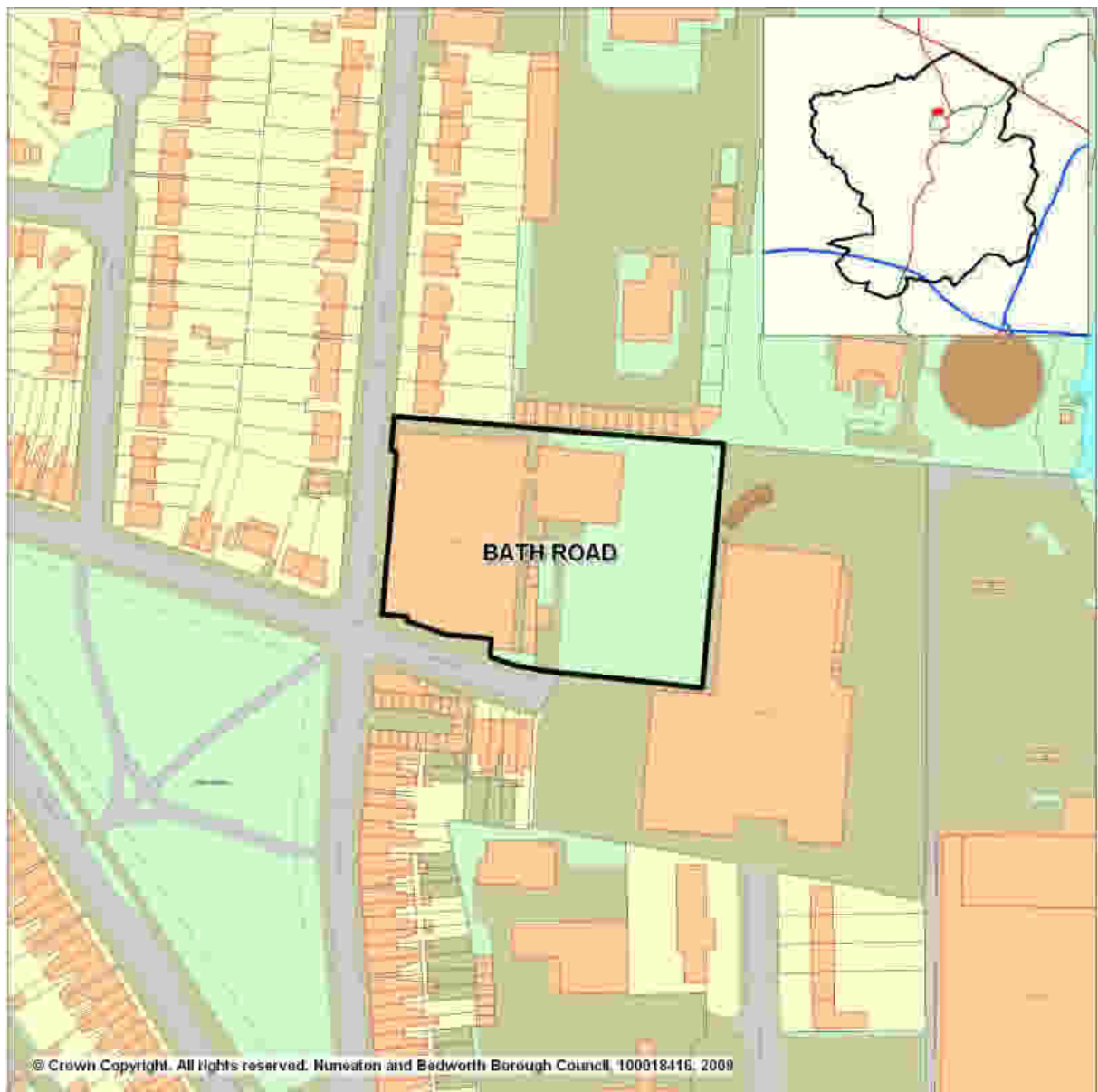
E3 - Midland Road Rail Network



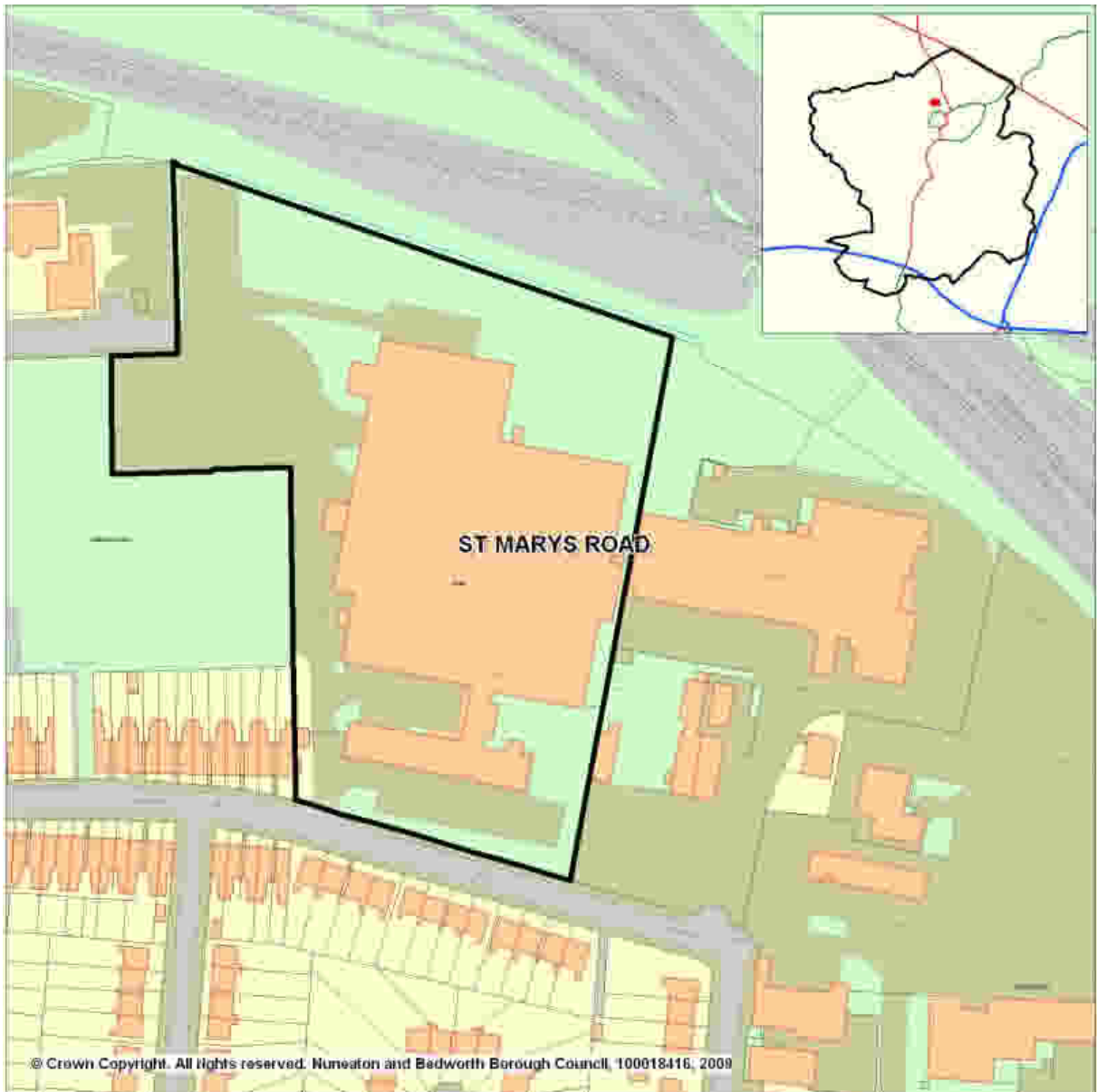
E4 - Aston Industrial Estate



E5 - Bath Road



E6 - St Mary's Road



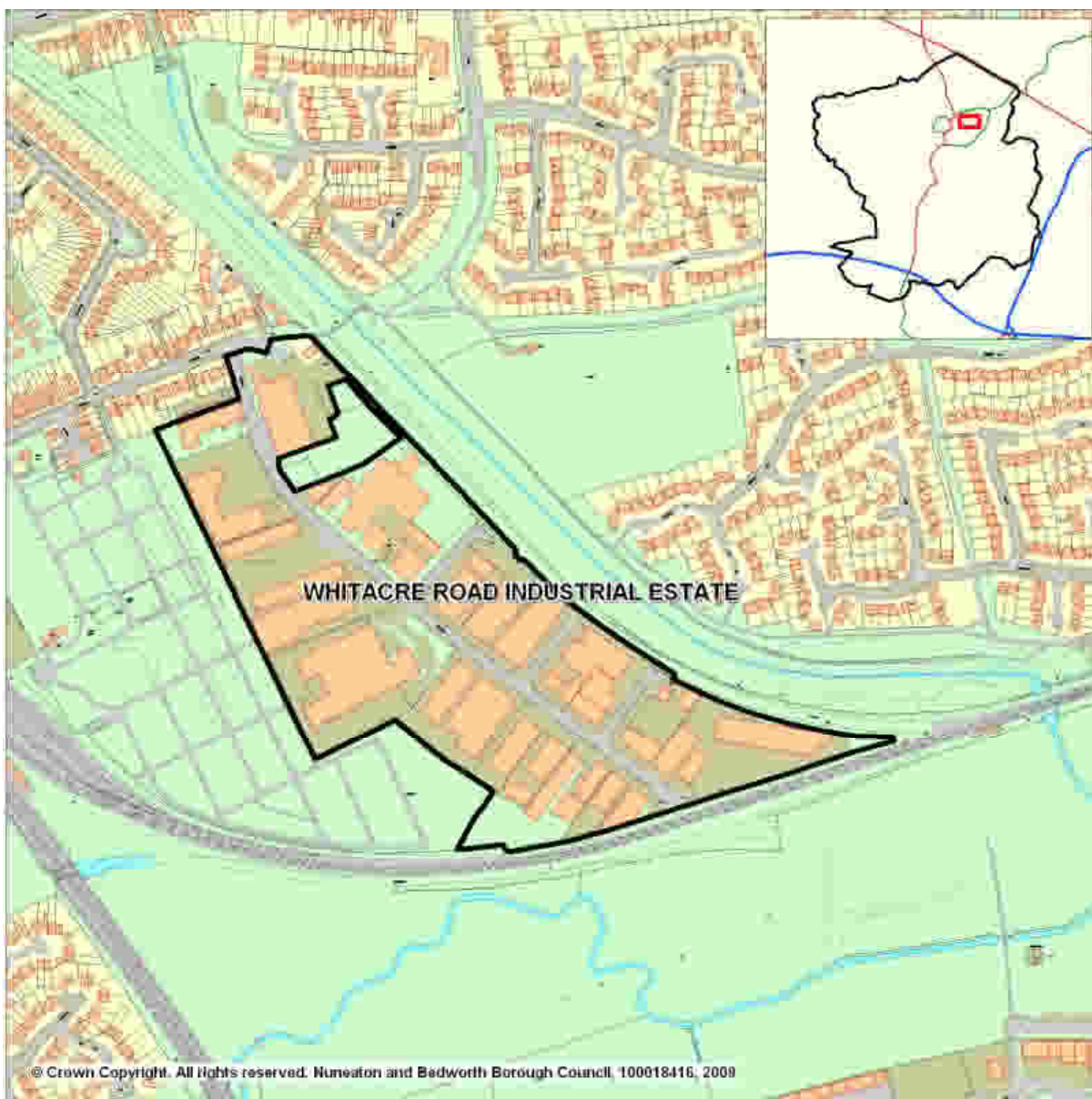
E7 – Weddington Terrace Industrial Estate



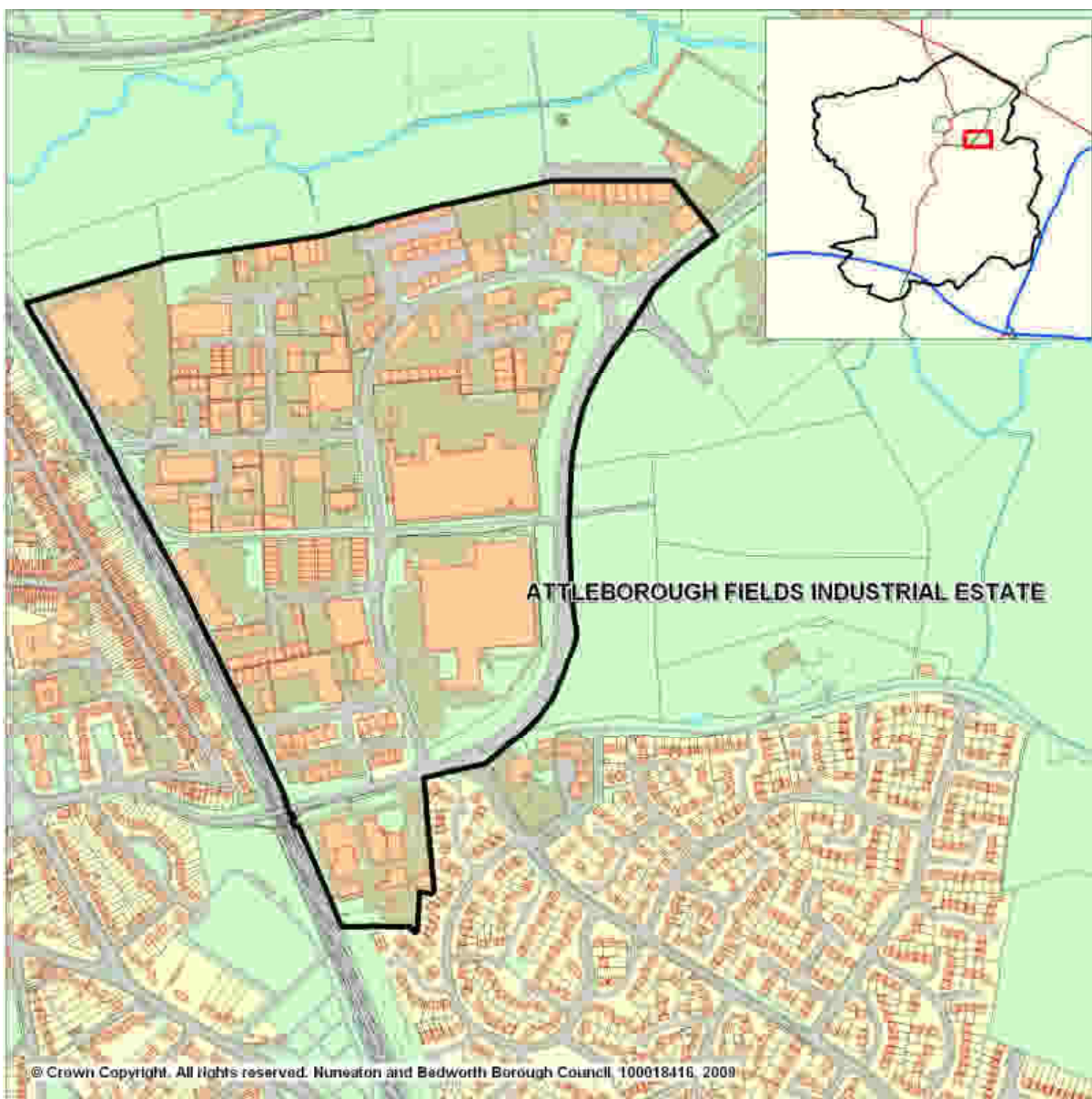
E8 - Oaston Road



E9 - Whitacre Road



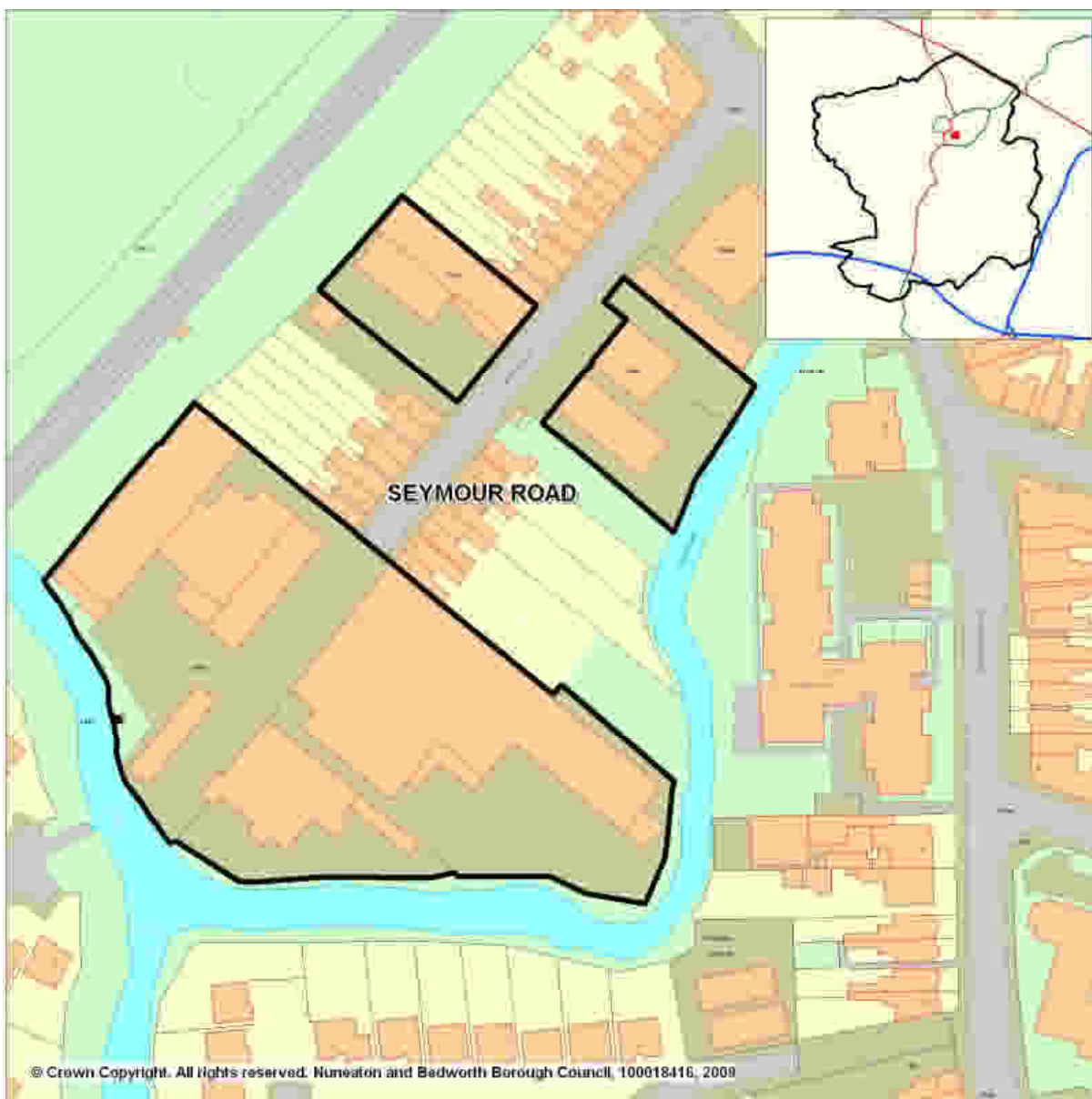
E10 - Attleborough Fields



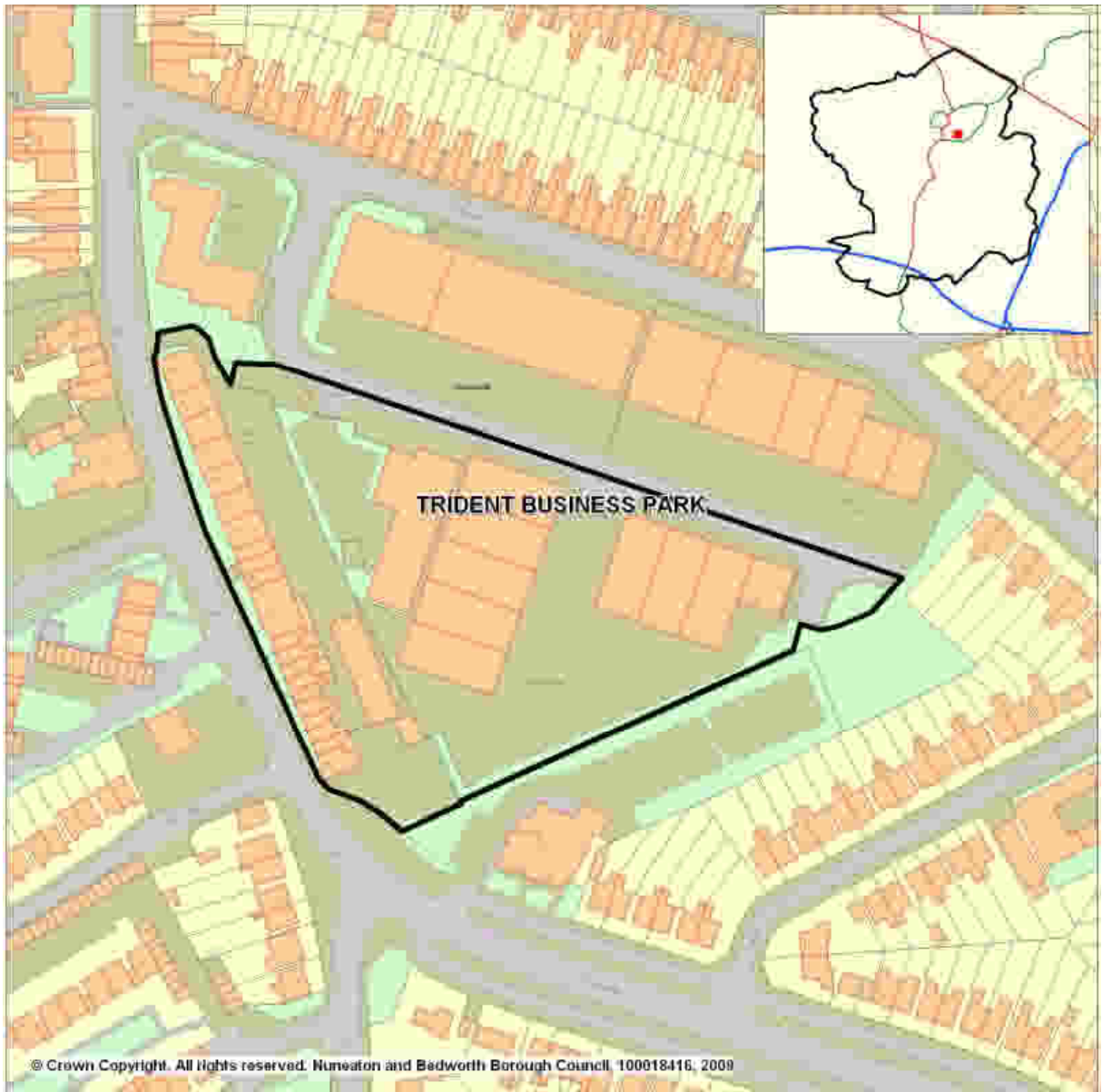
E11 - Hemdale Business Park



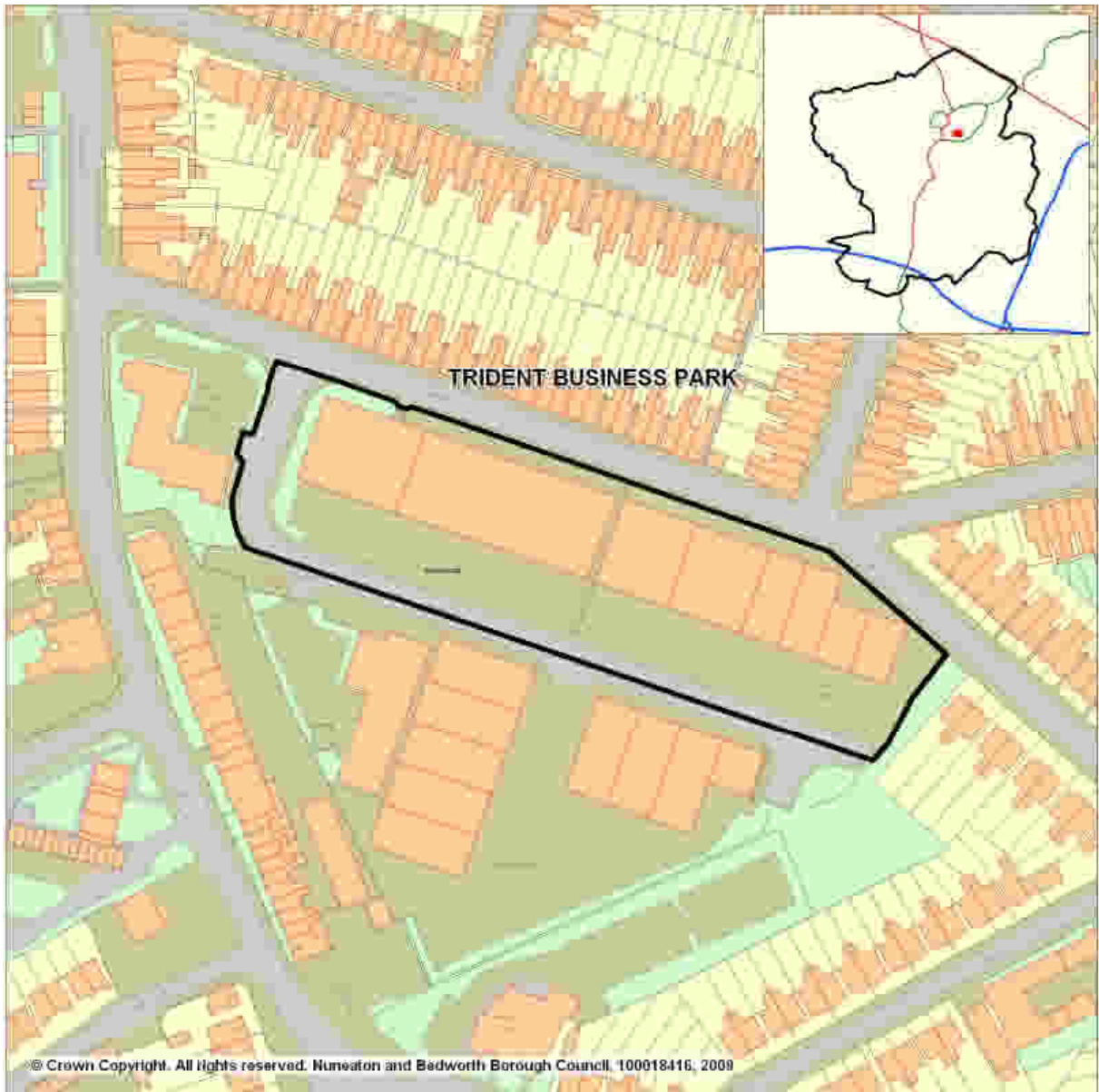
E12 - Seymour Road



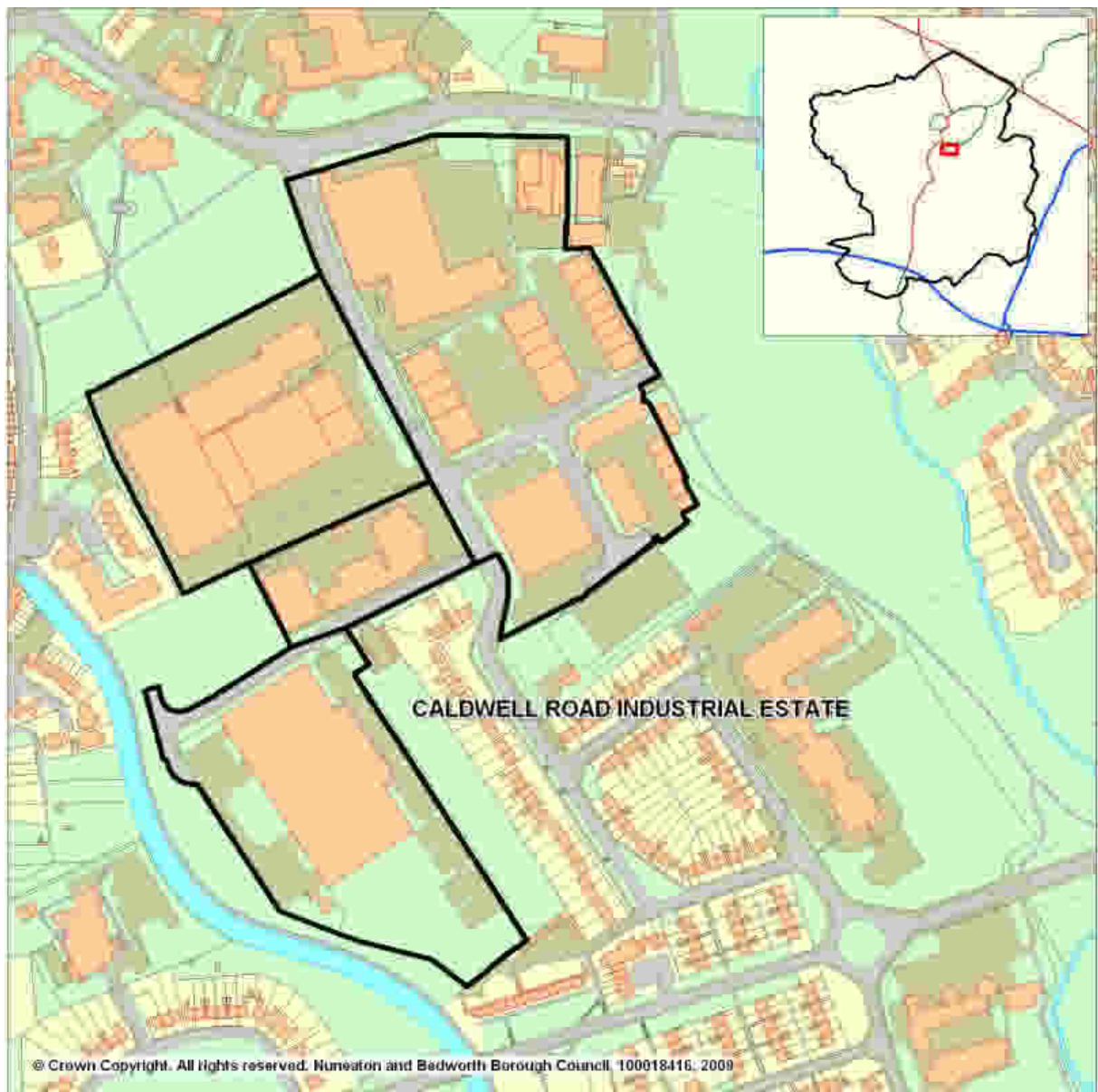
E13 - Trident Business Park 1



E14 - Trident Business Park 2



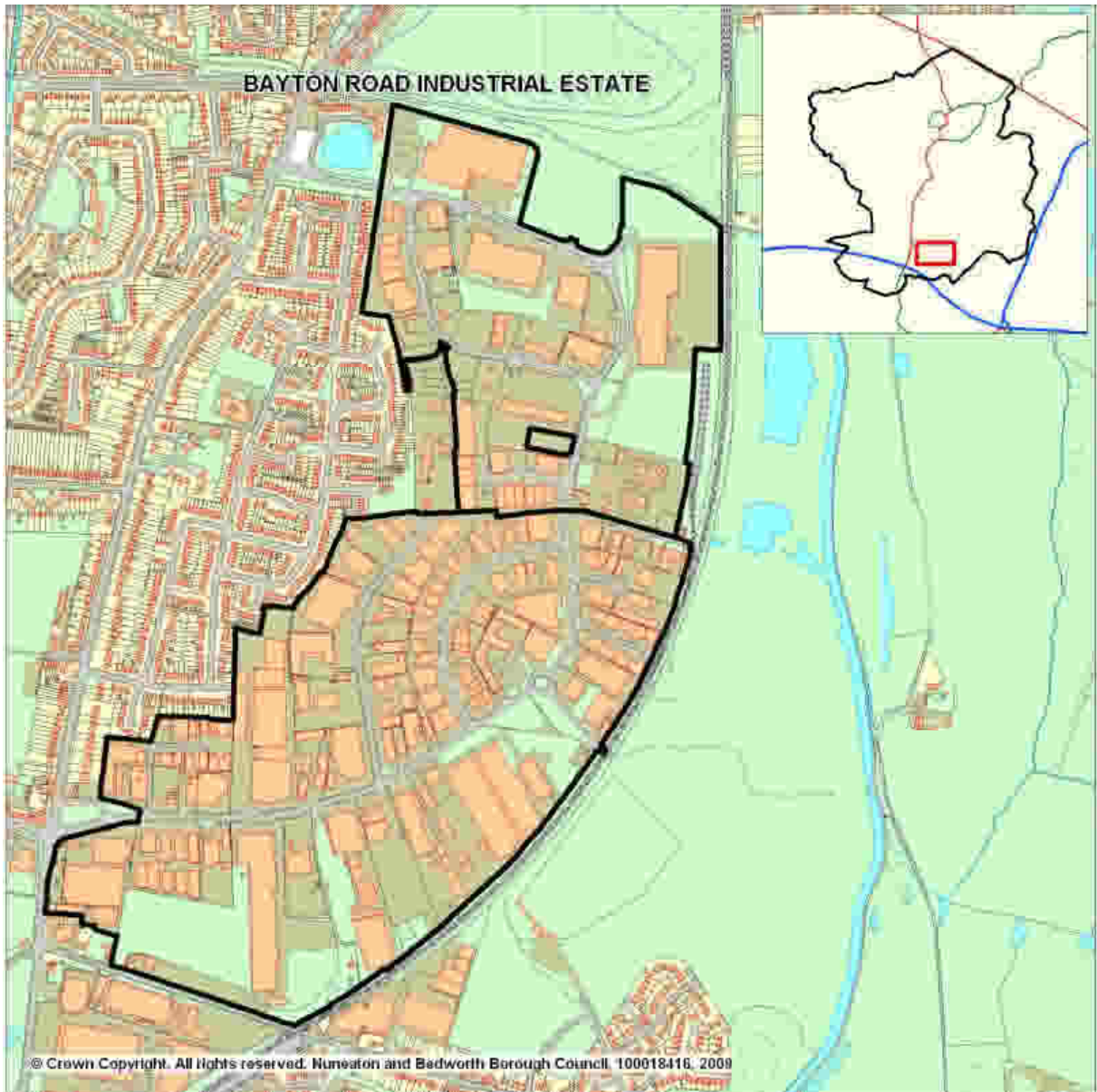
E15 – E18 – Caldwell Road Industrial Estate



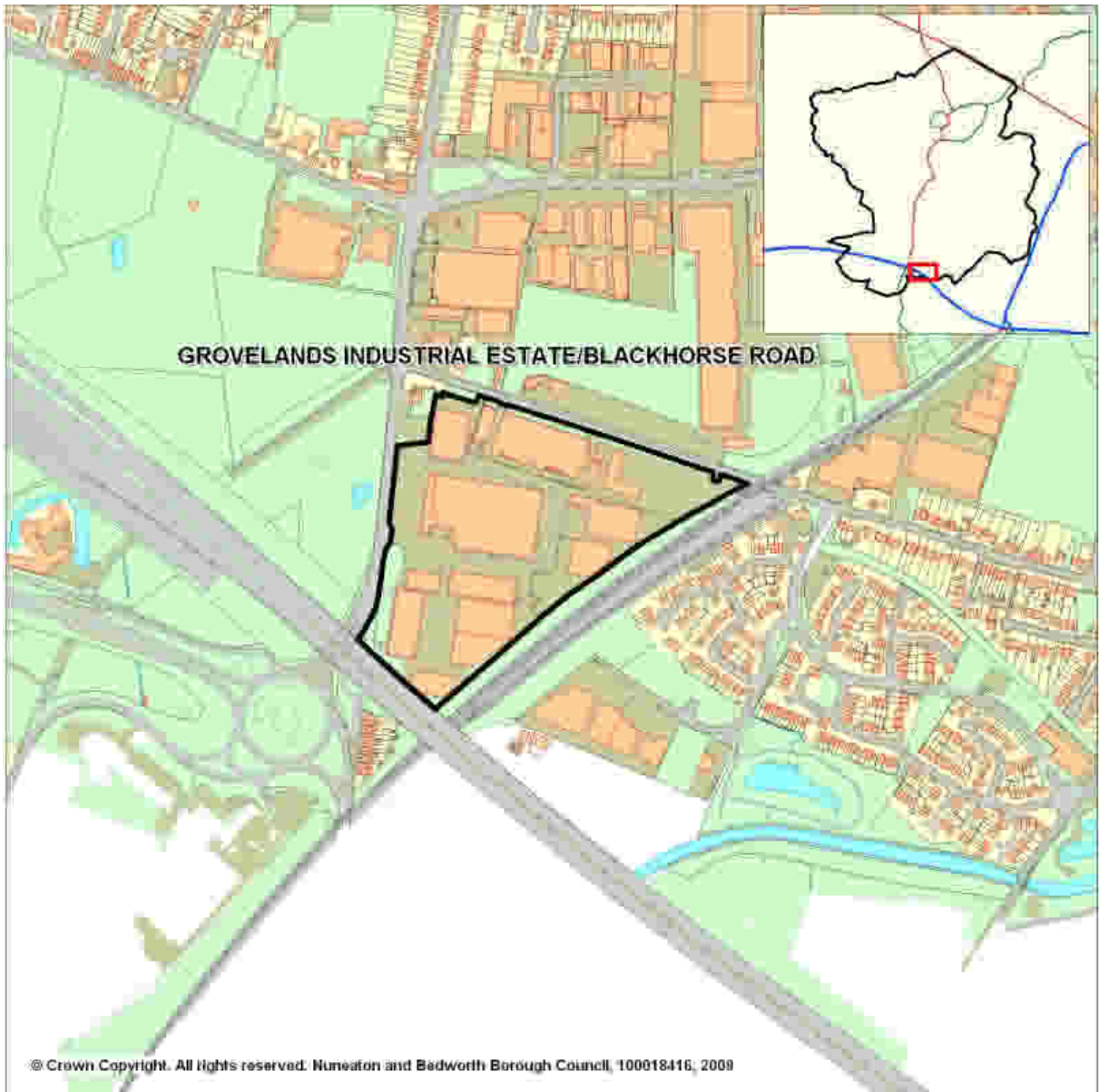
E19 - Marston Jabbett



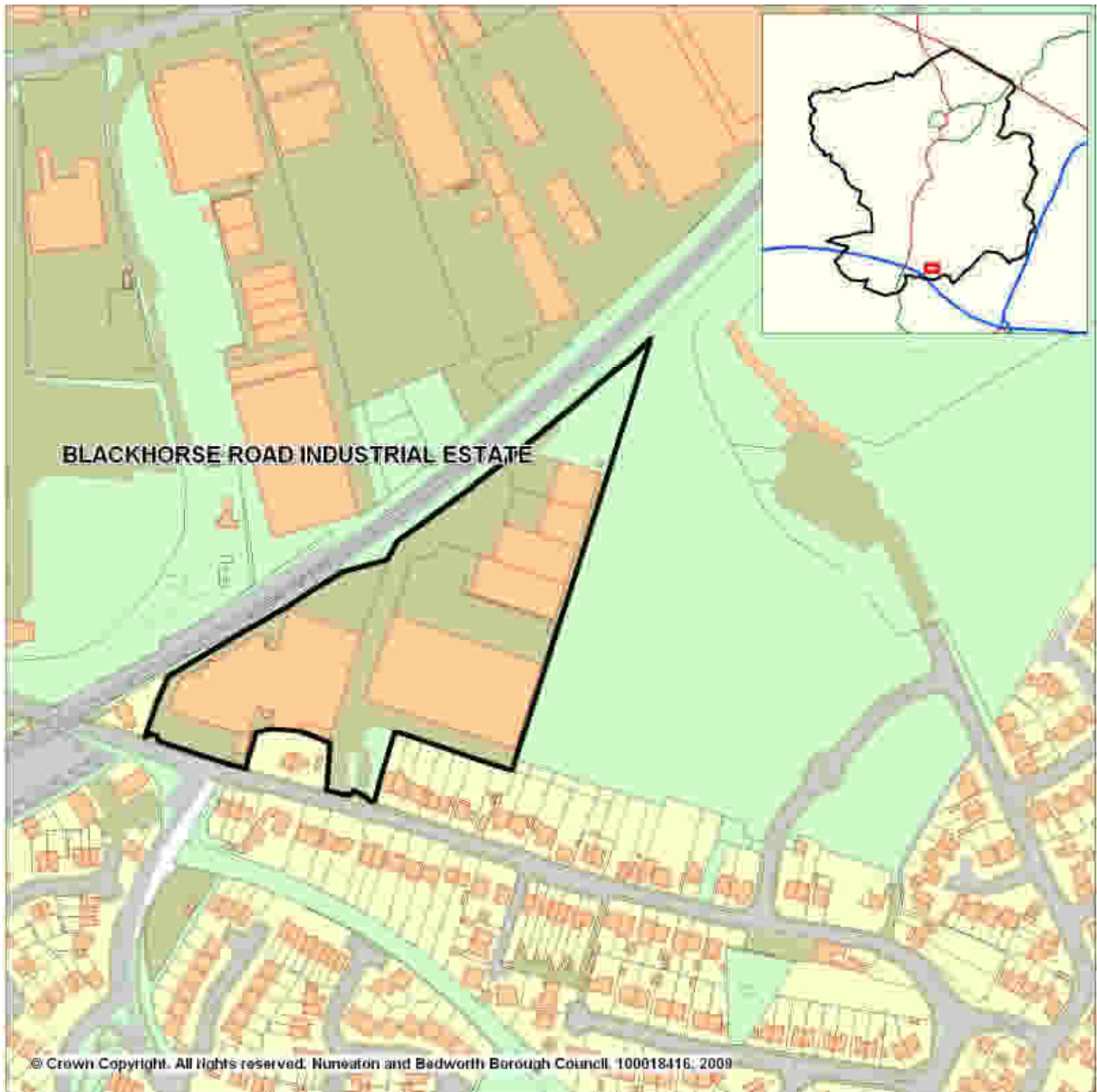
E20 & E21 - Bayton Road Industrial Estate 1



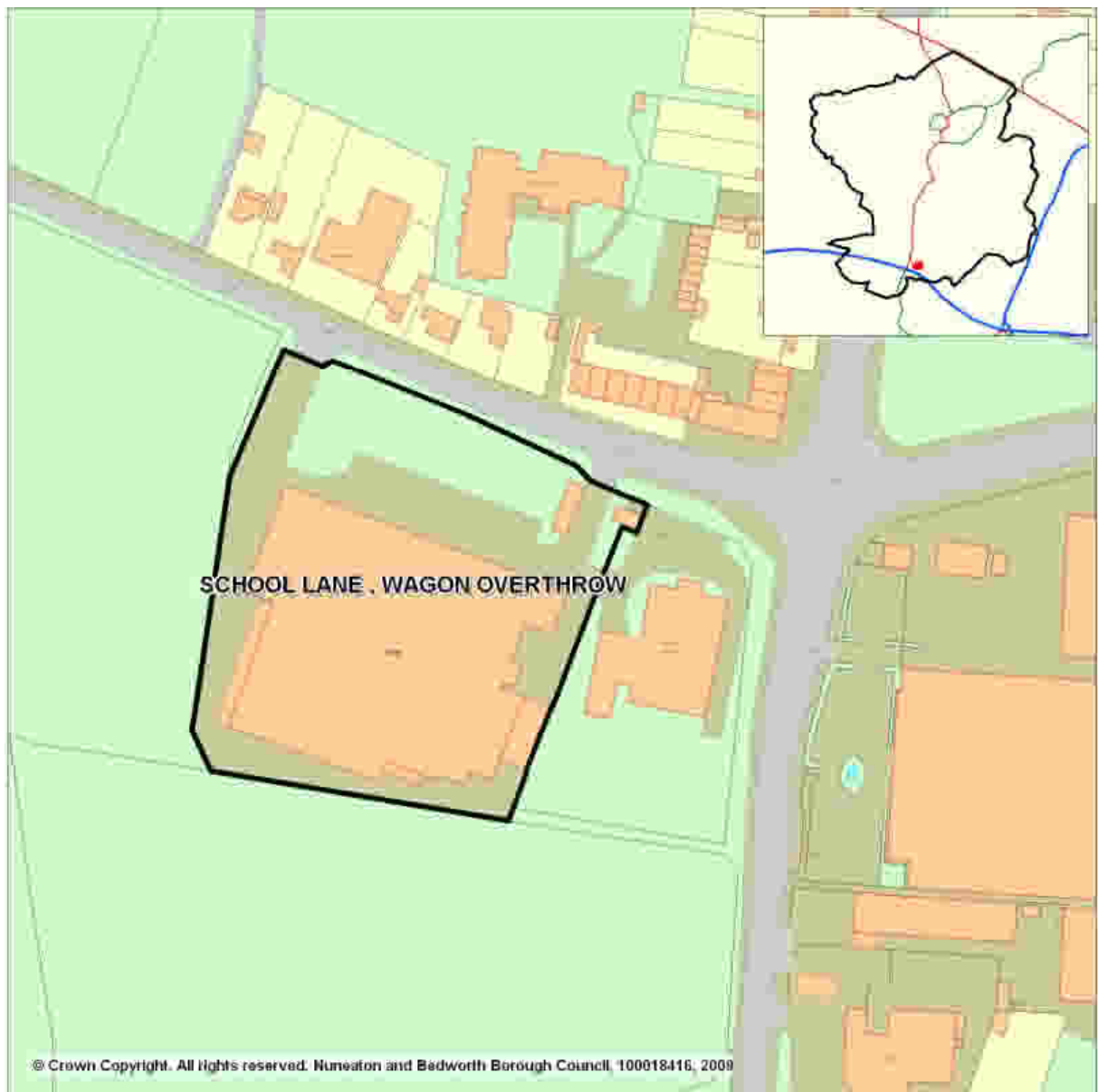
E22 - Grovelands Industrial Estate



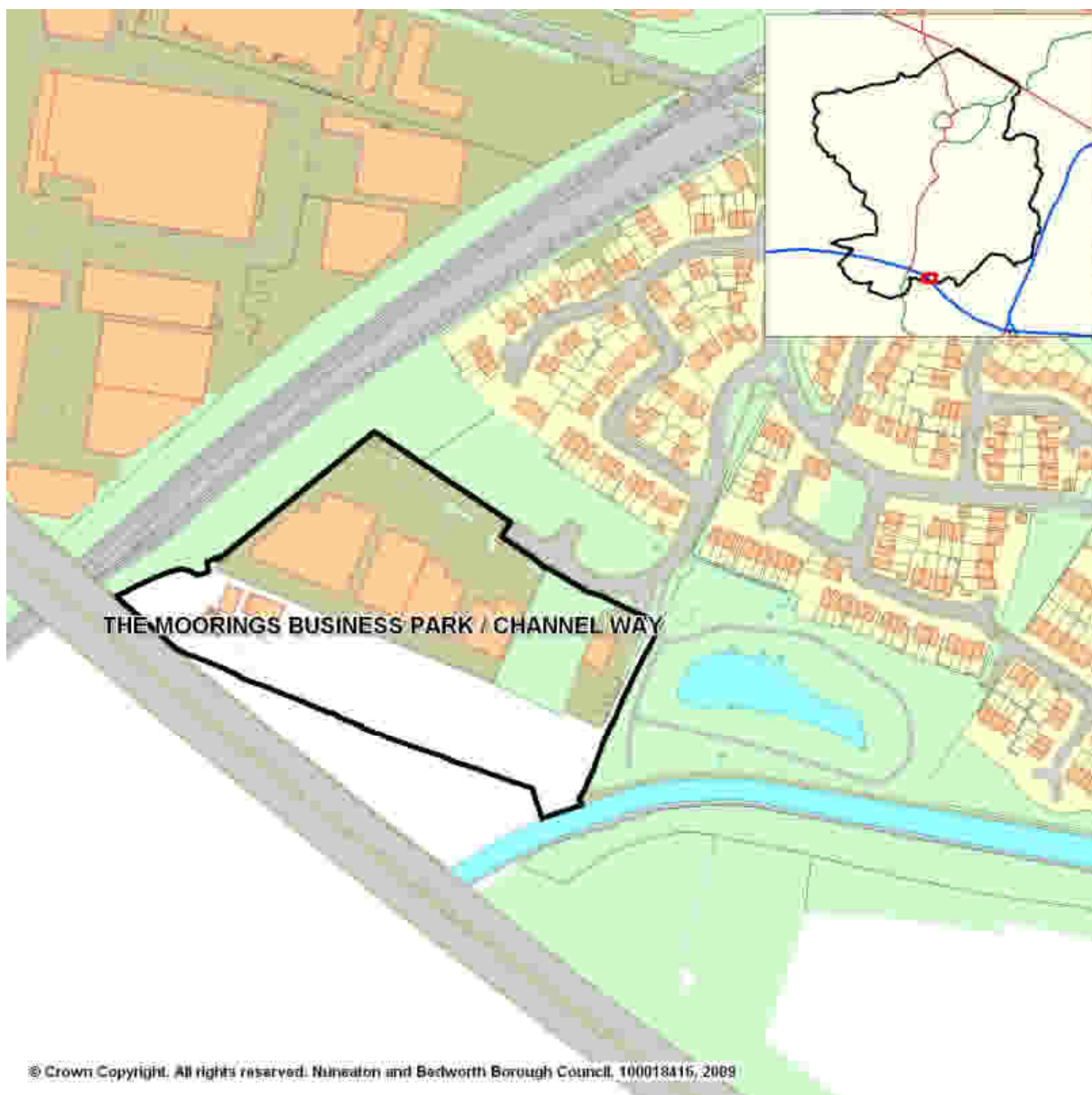
E23 - Blackhorse Road Industrial Estate



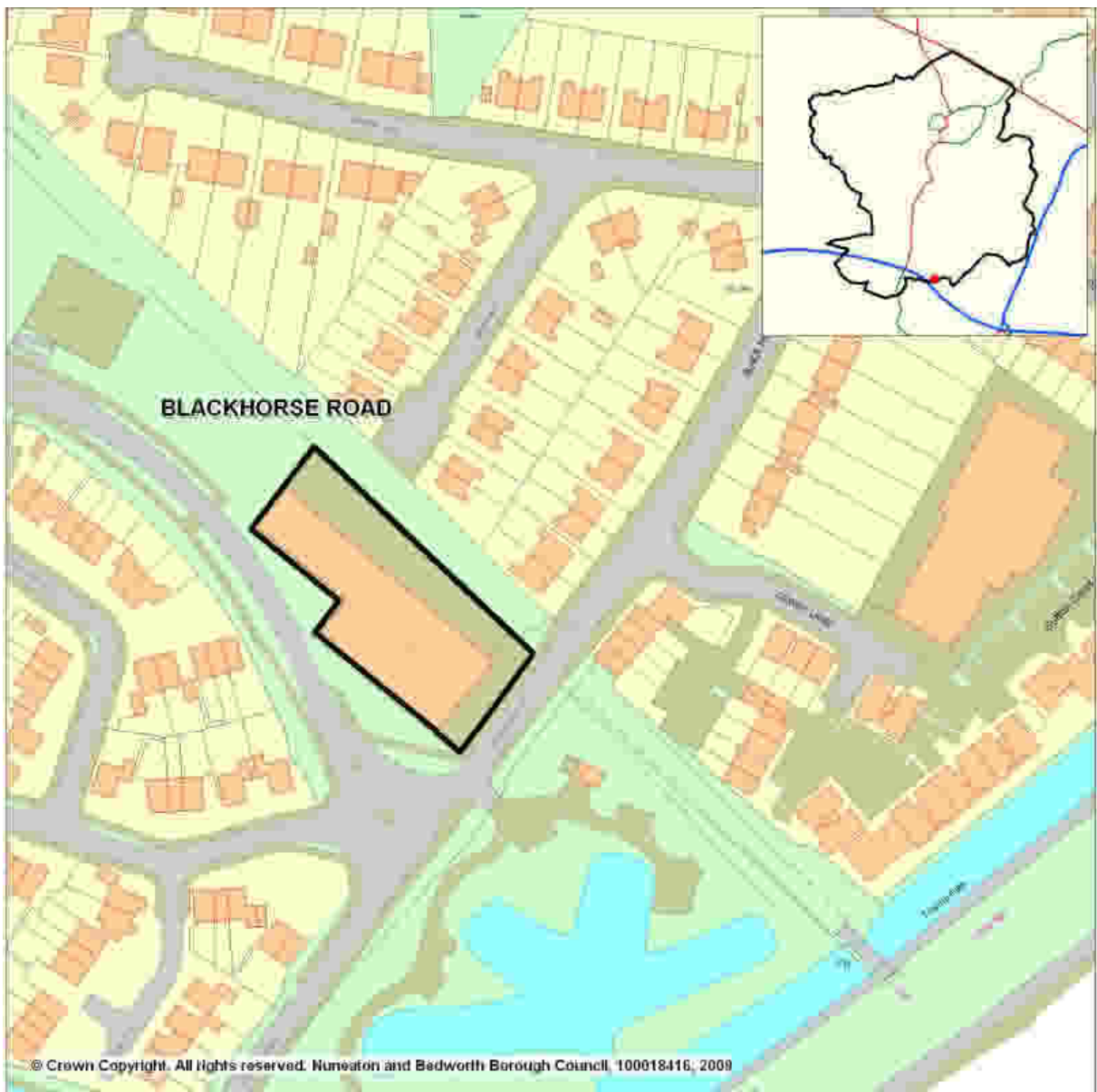
E24 - School Lane



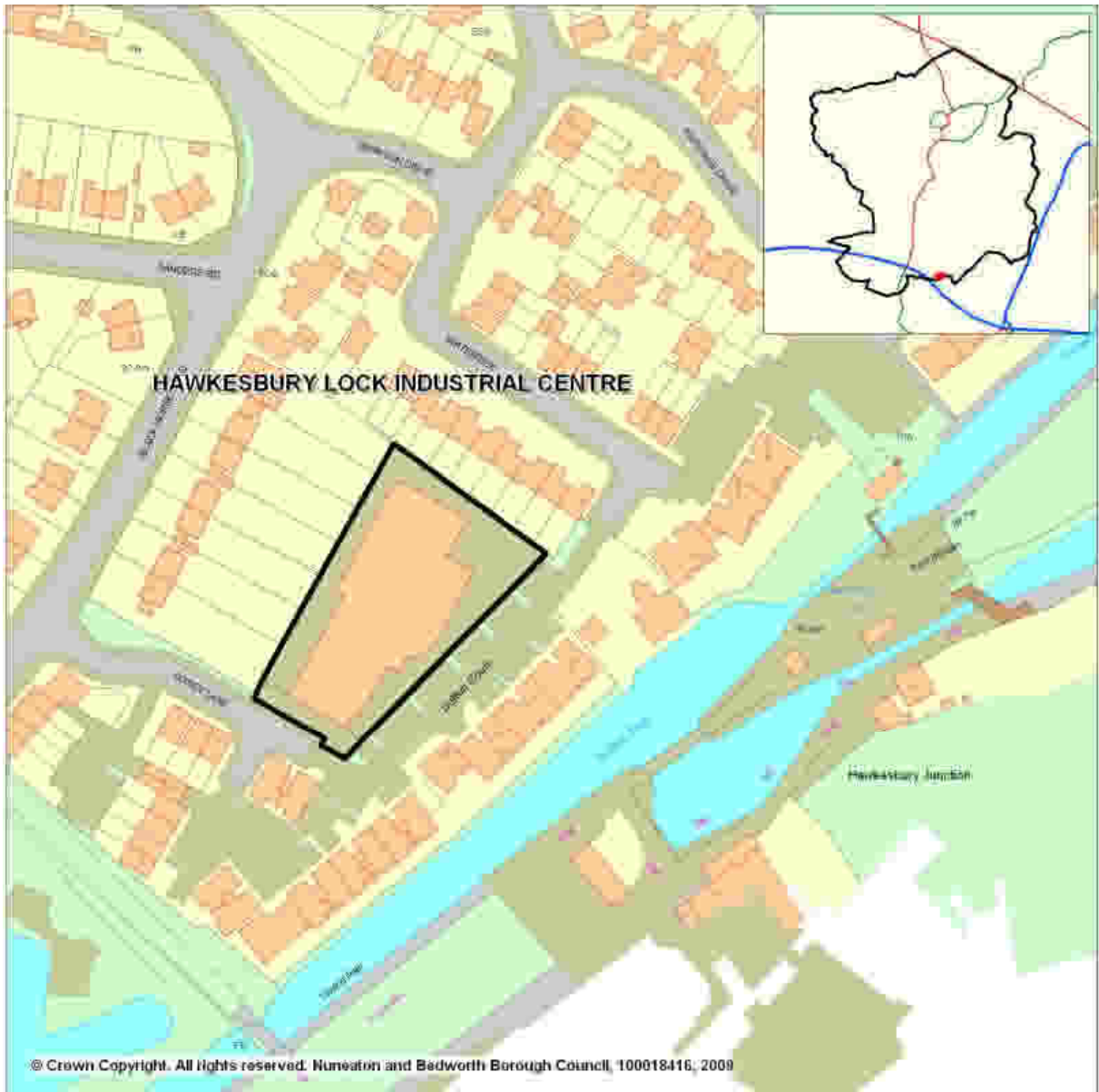
E25 - The Moorings Business Park



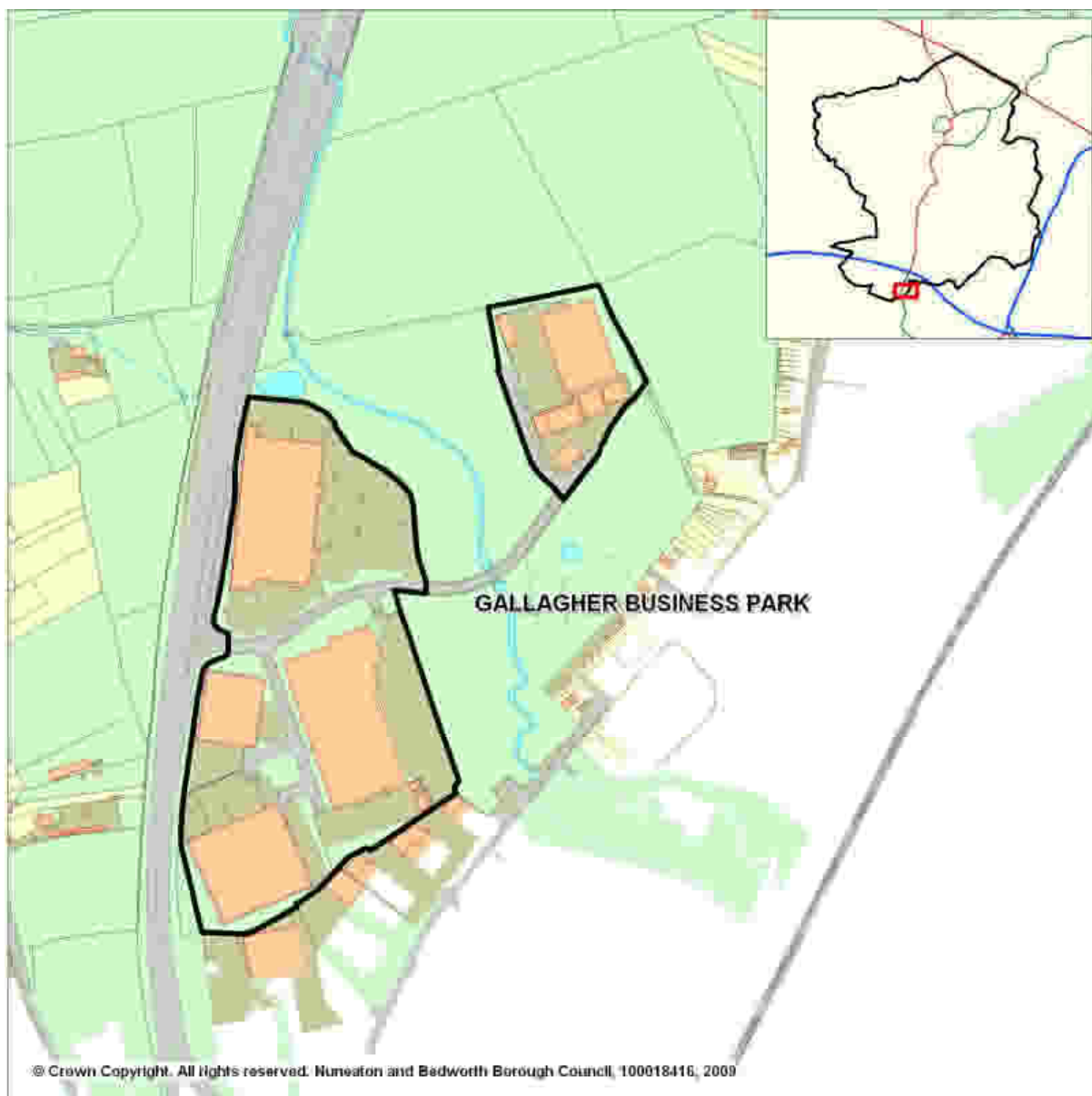
E26 - Blackhorse Road



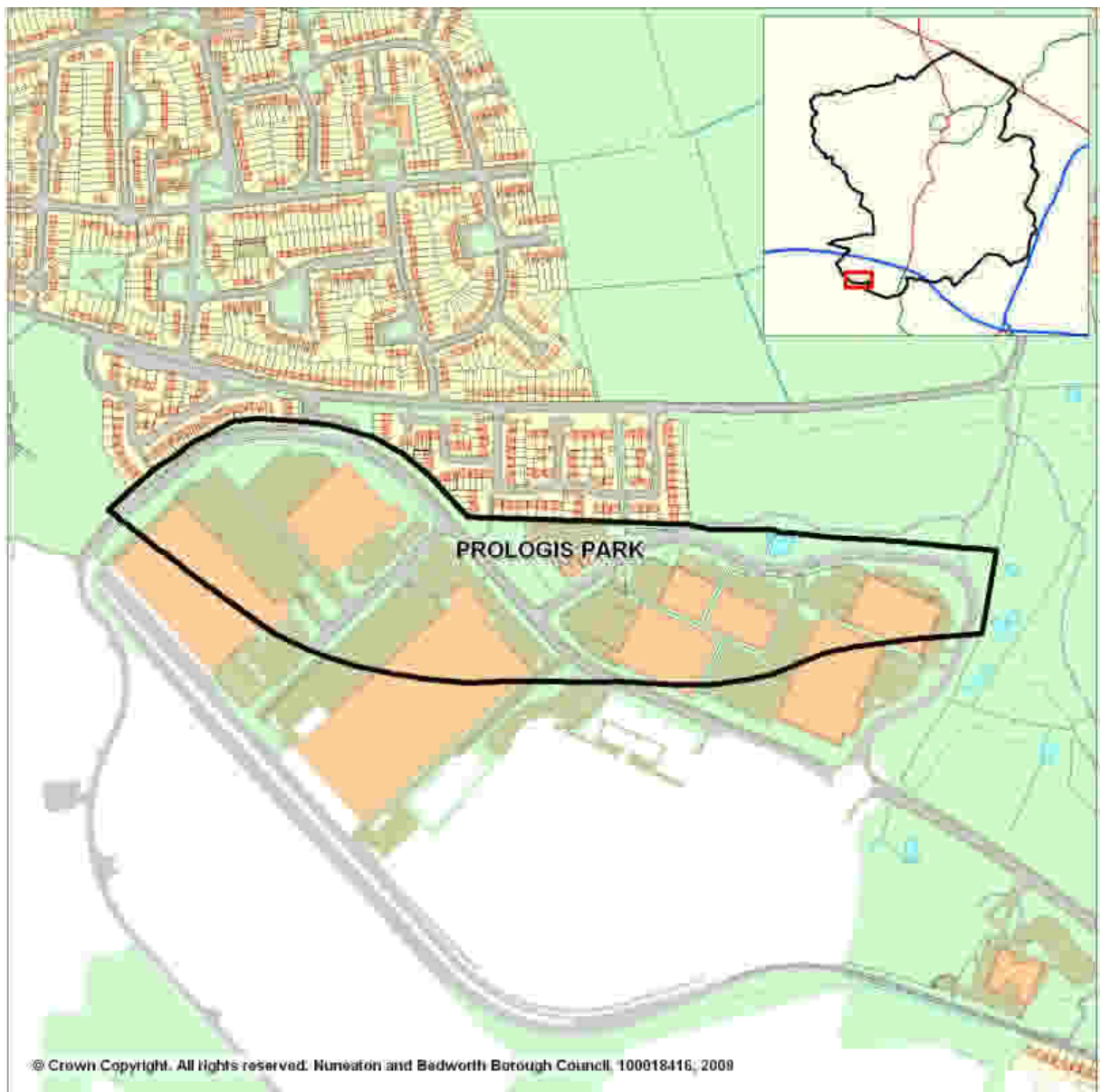
E27 - Hawkesbury Lock Industrial Centre



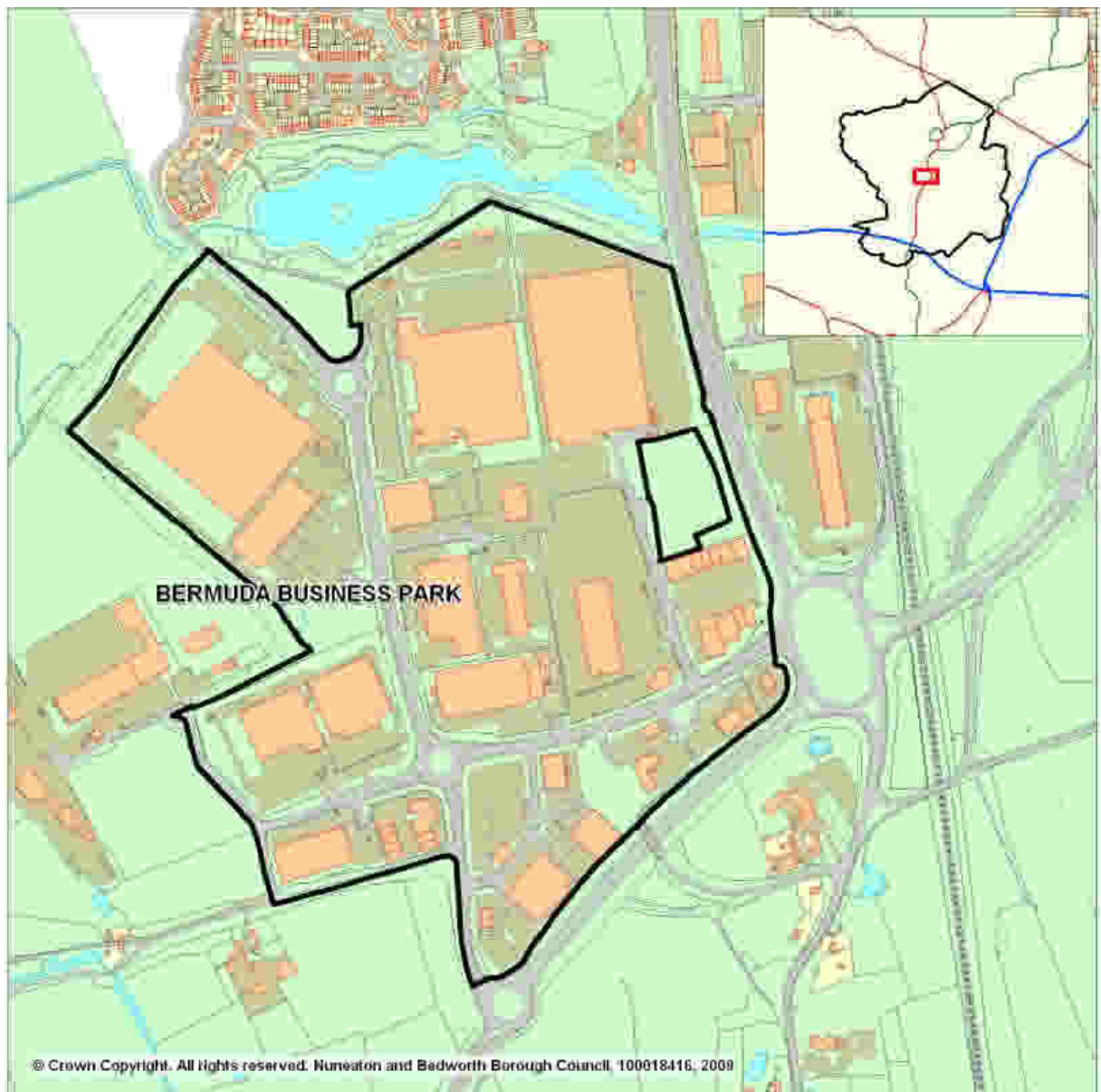
E28 - Gallagher Business Park



E29 - Prologis Park



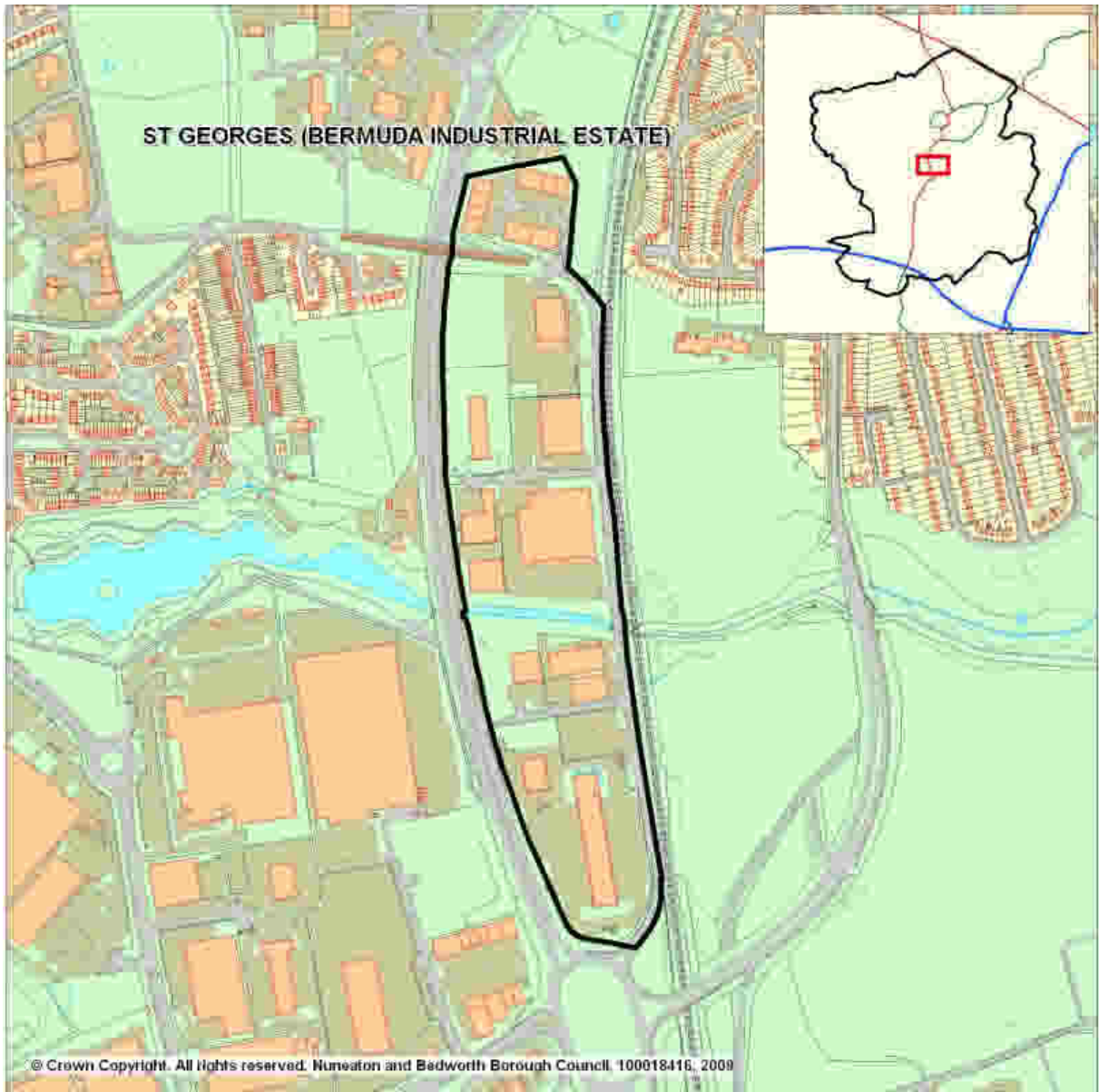
E30 - Bermuda Industrial Estate 1



E31 - Eliot Park



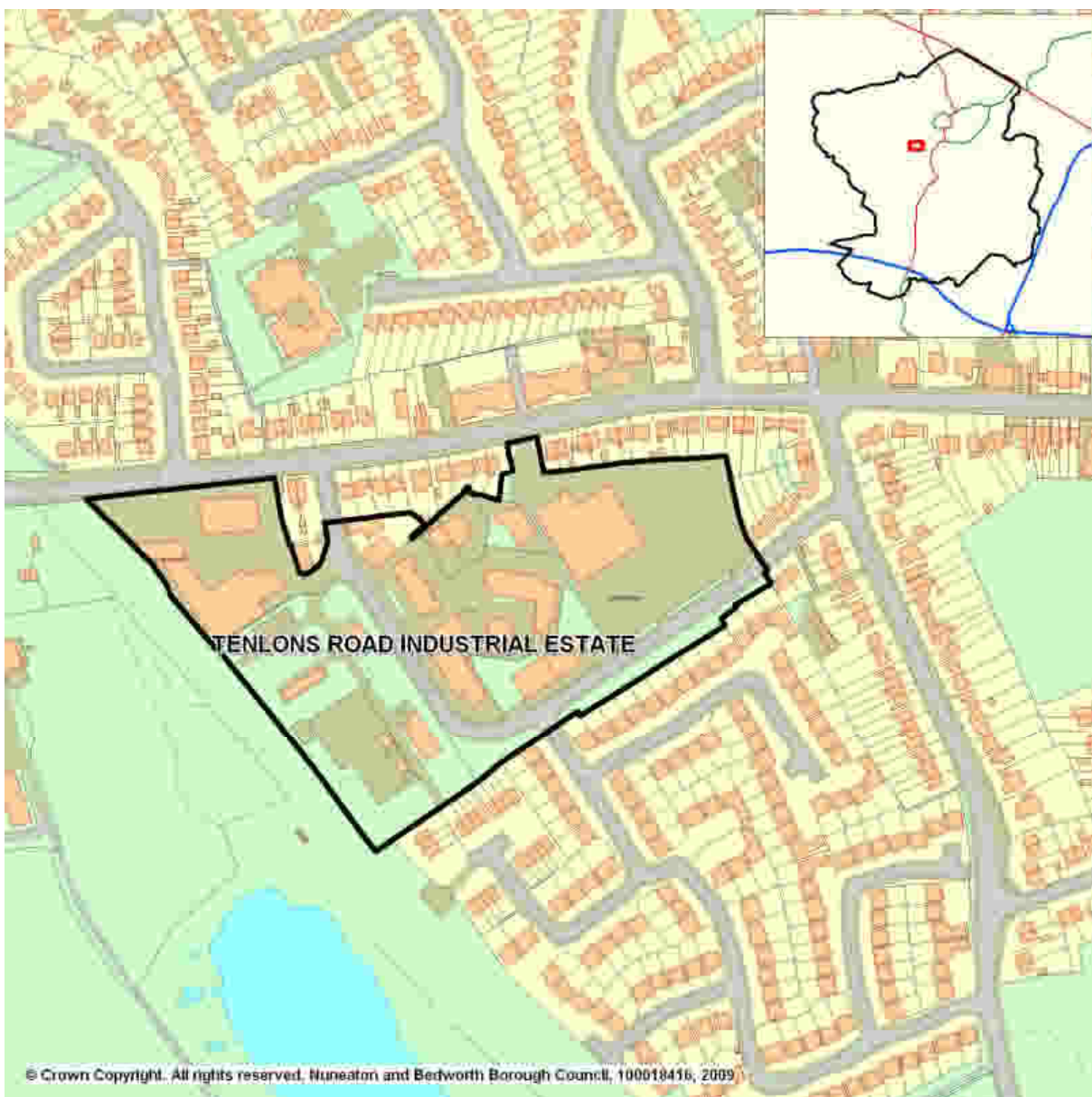
E32 - St Georges (Bermuda Industrial Estate)



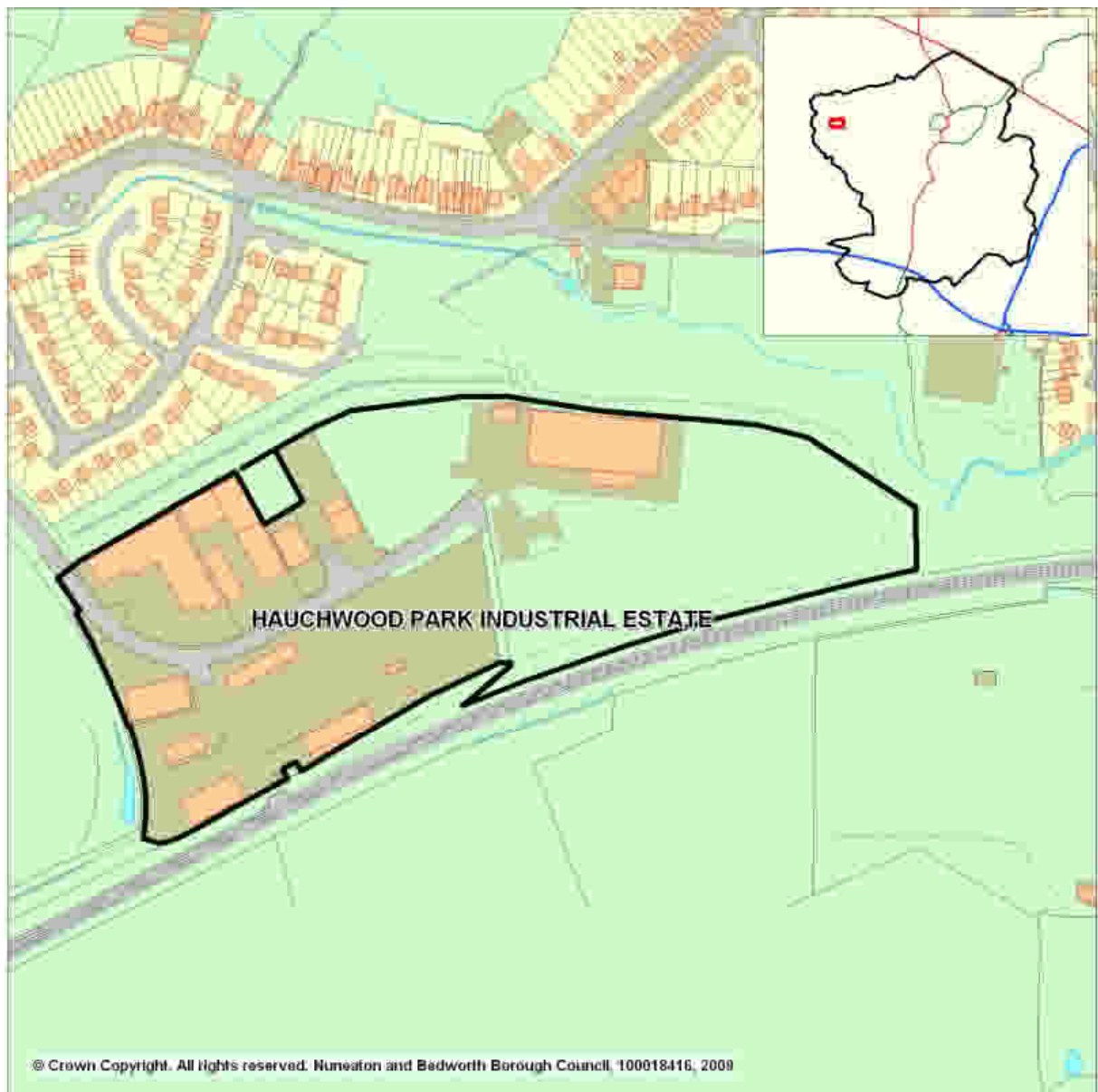
E33 - Hazell Way Industrial Estate



E34 - Tenlons Road Industrial Estate



E35 – Haunchwood

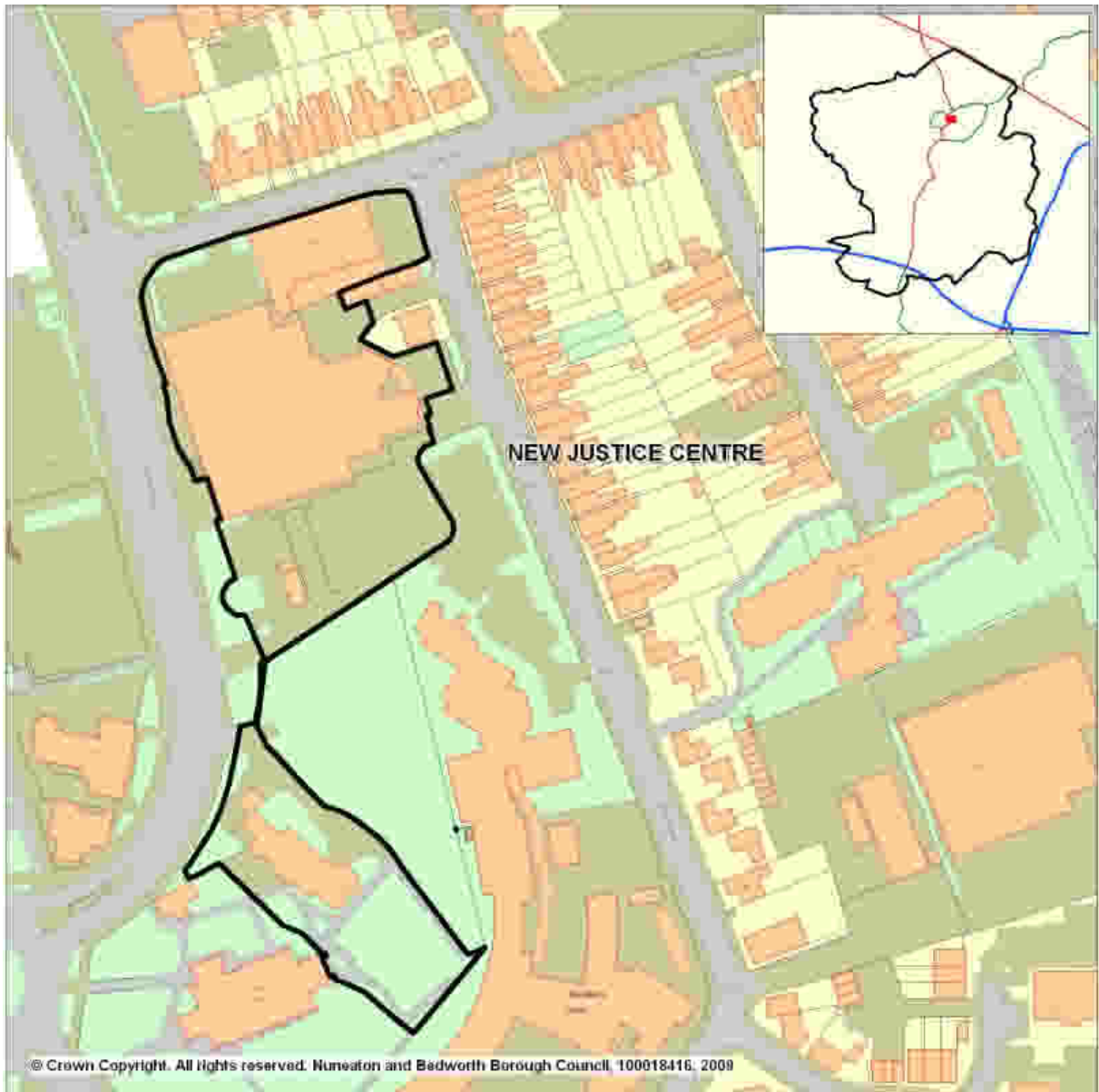


E36 - King Edward Road



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E37 - Justice Centre



E38 - Anker Street



E39 - Newtown Road, Bedworth



E40 - Hope Aldridge Business Centre



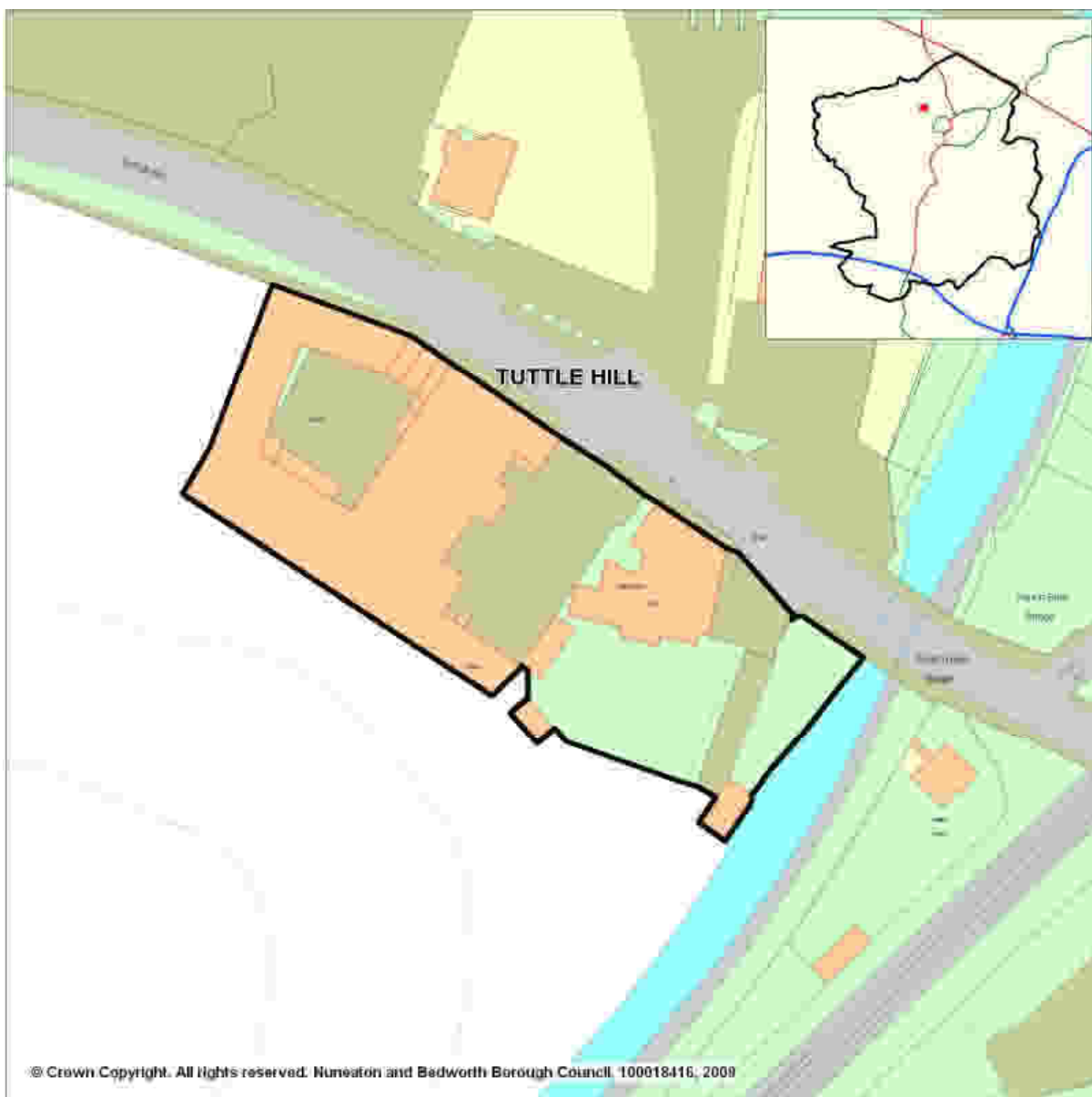
E41 - Weddington Road



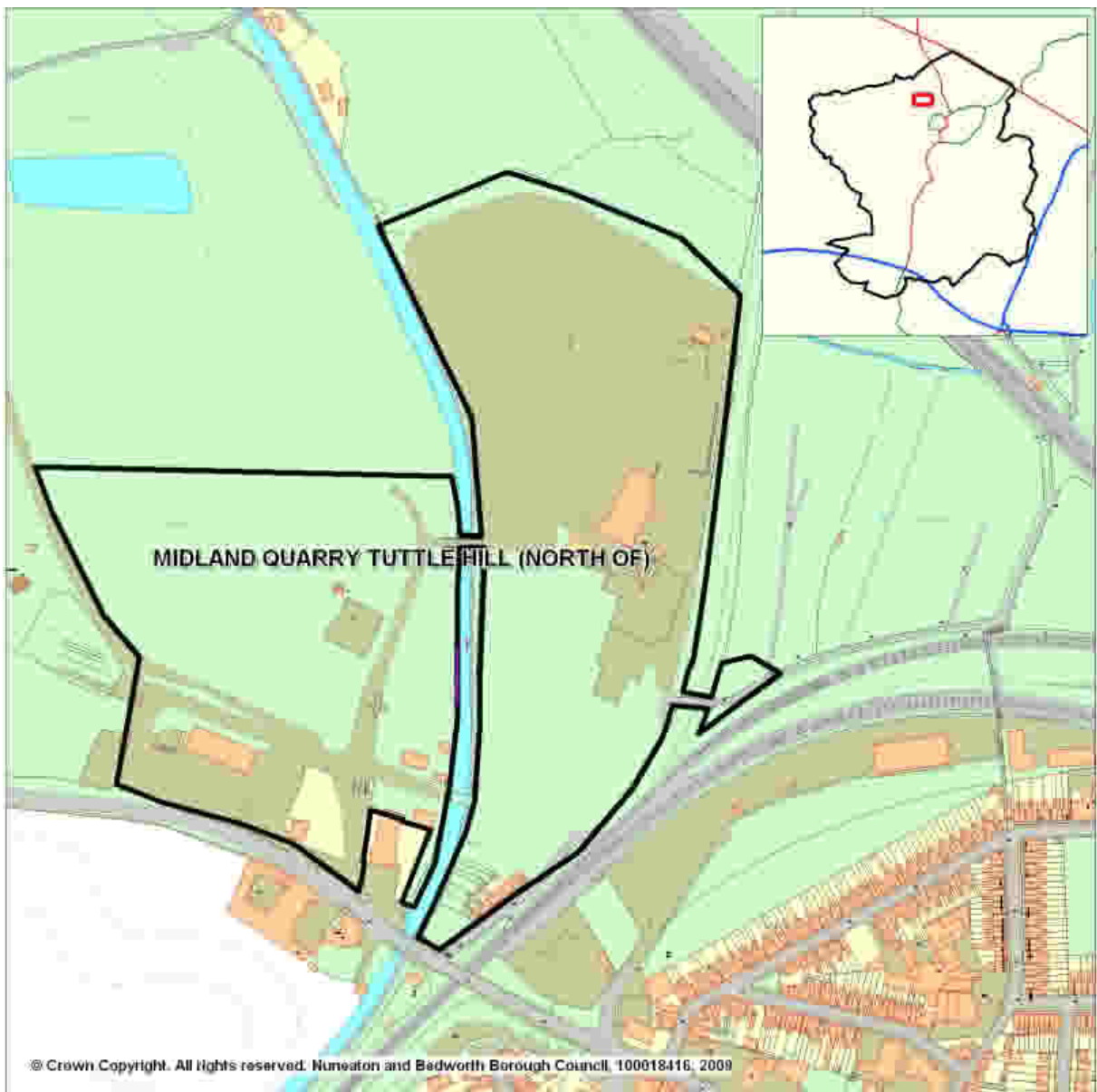
E42 - Ashbrook Court, Prologis Park



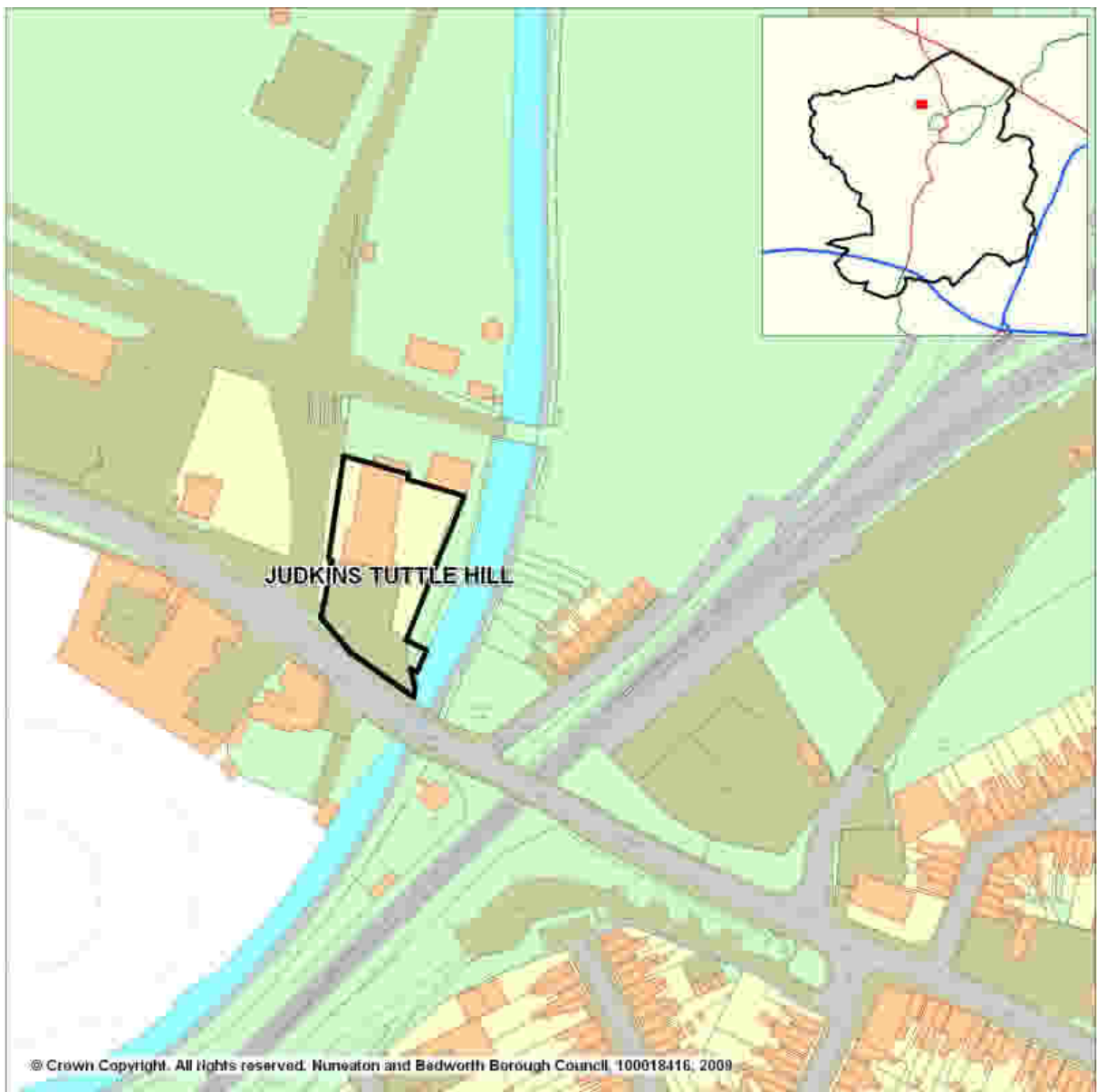
E43 - Tuttle Hill



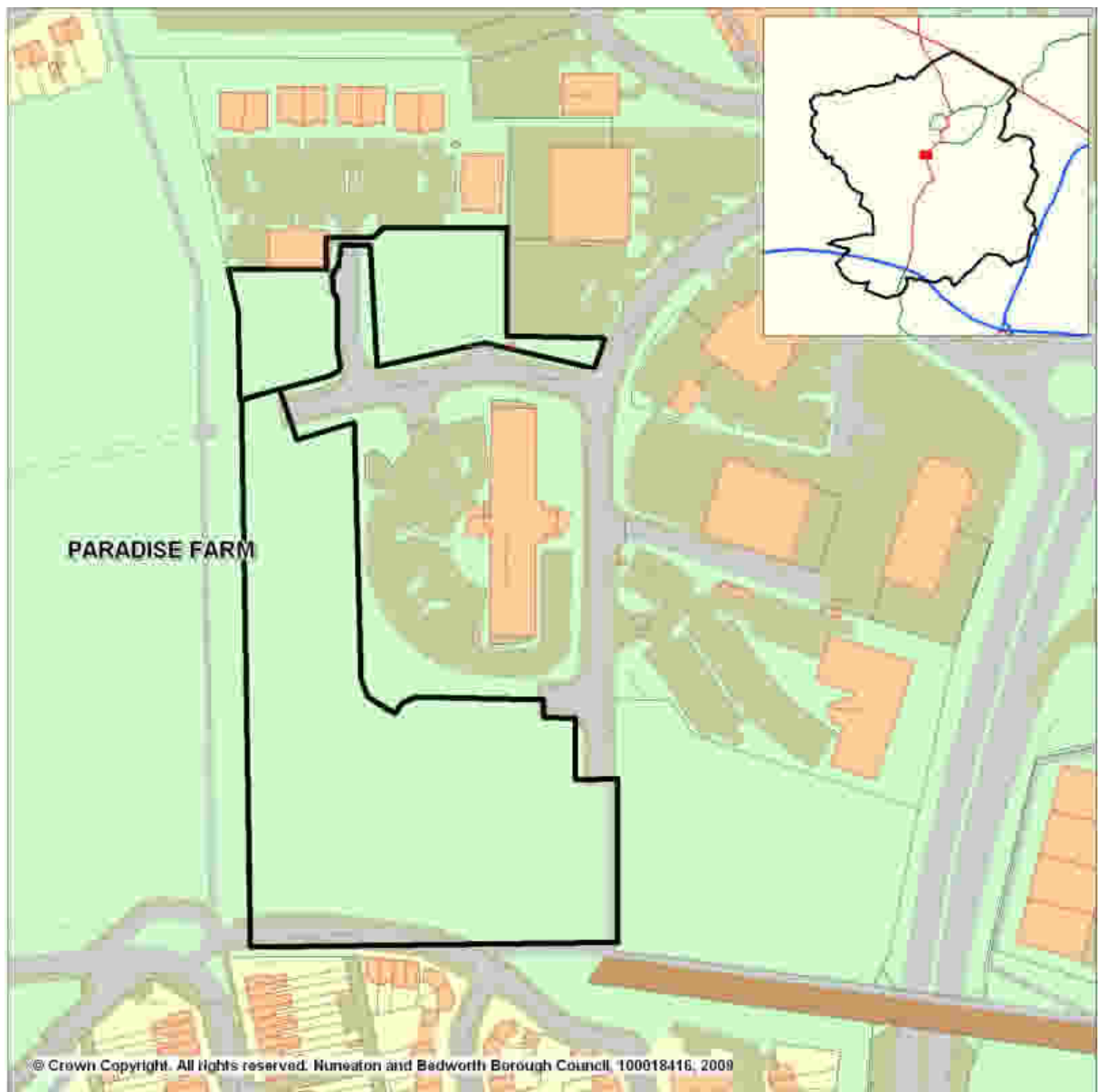
P1 - Midland Quarry Tuttle Hill (North Of)



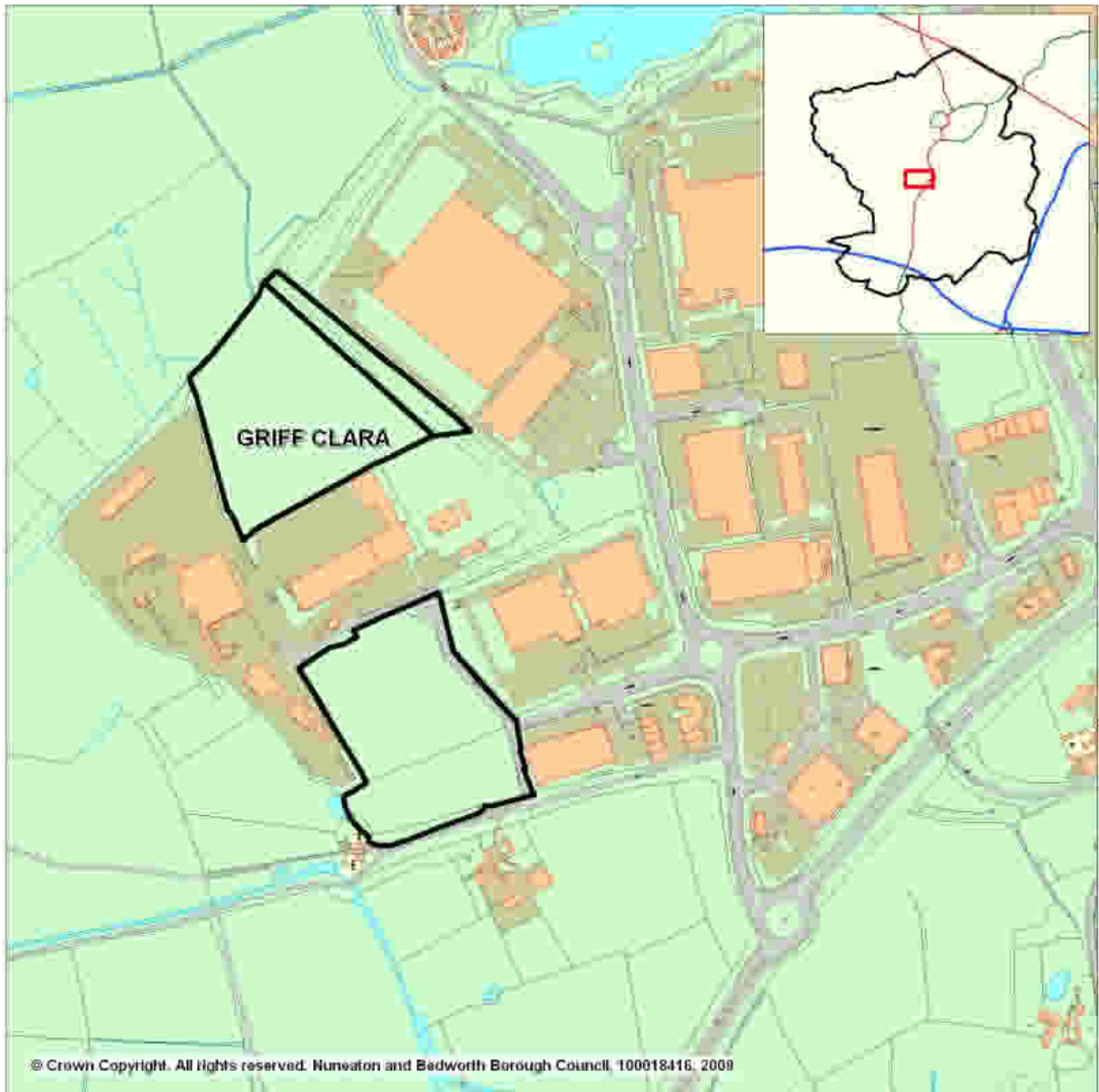
P2 - Judkins Tuttle Hill



P3 & P28 - Paradise Farm



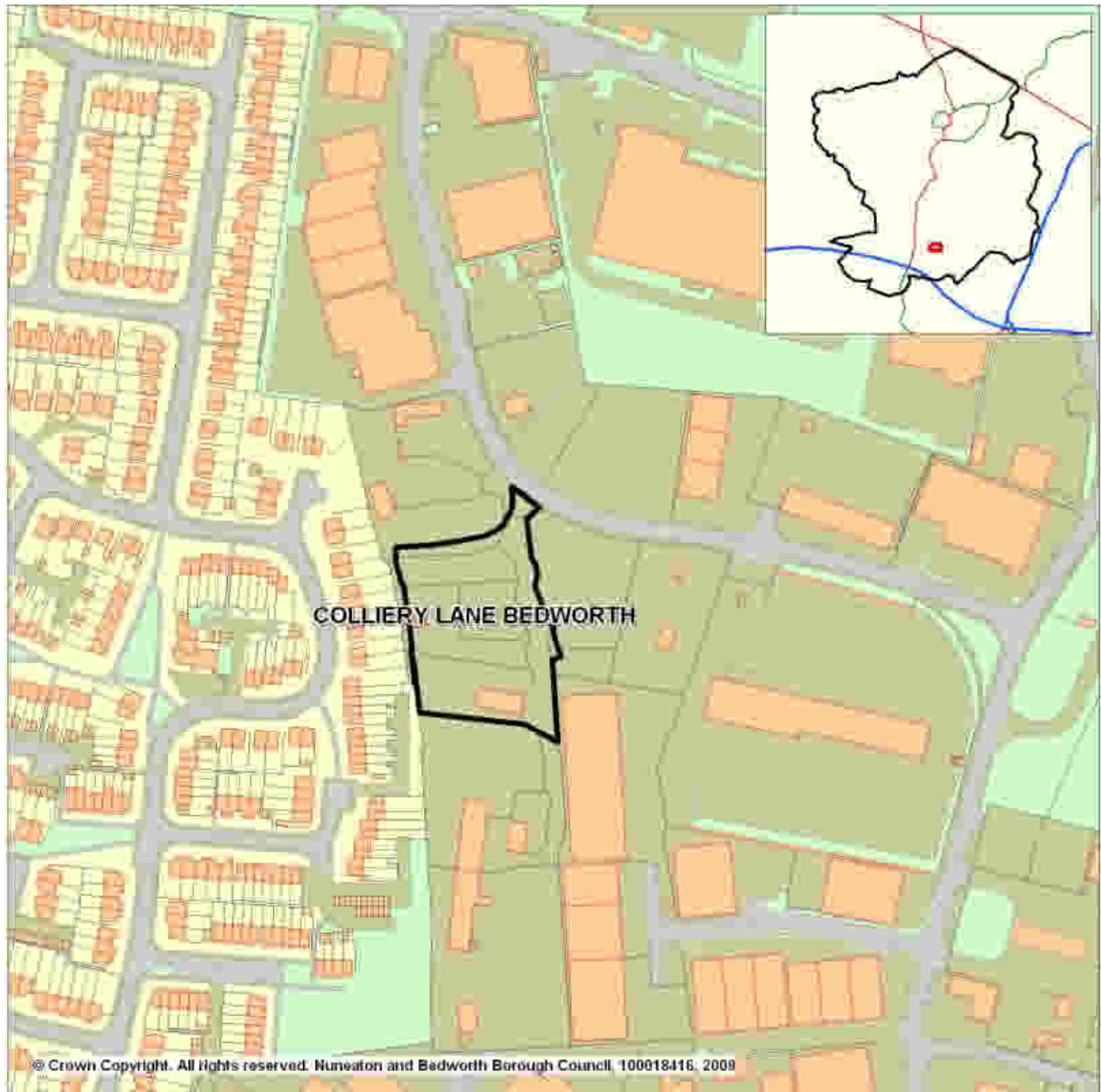
P4, P5 & P7 - Griff Clara Formerly Bermuda Industrial Estate



P6 - Bermuda Park



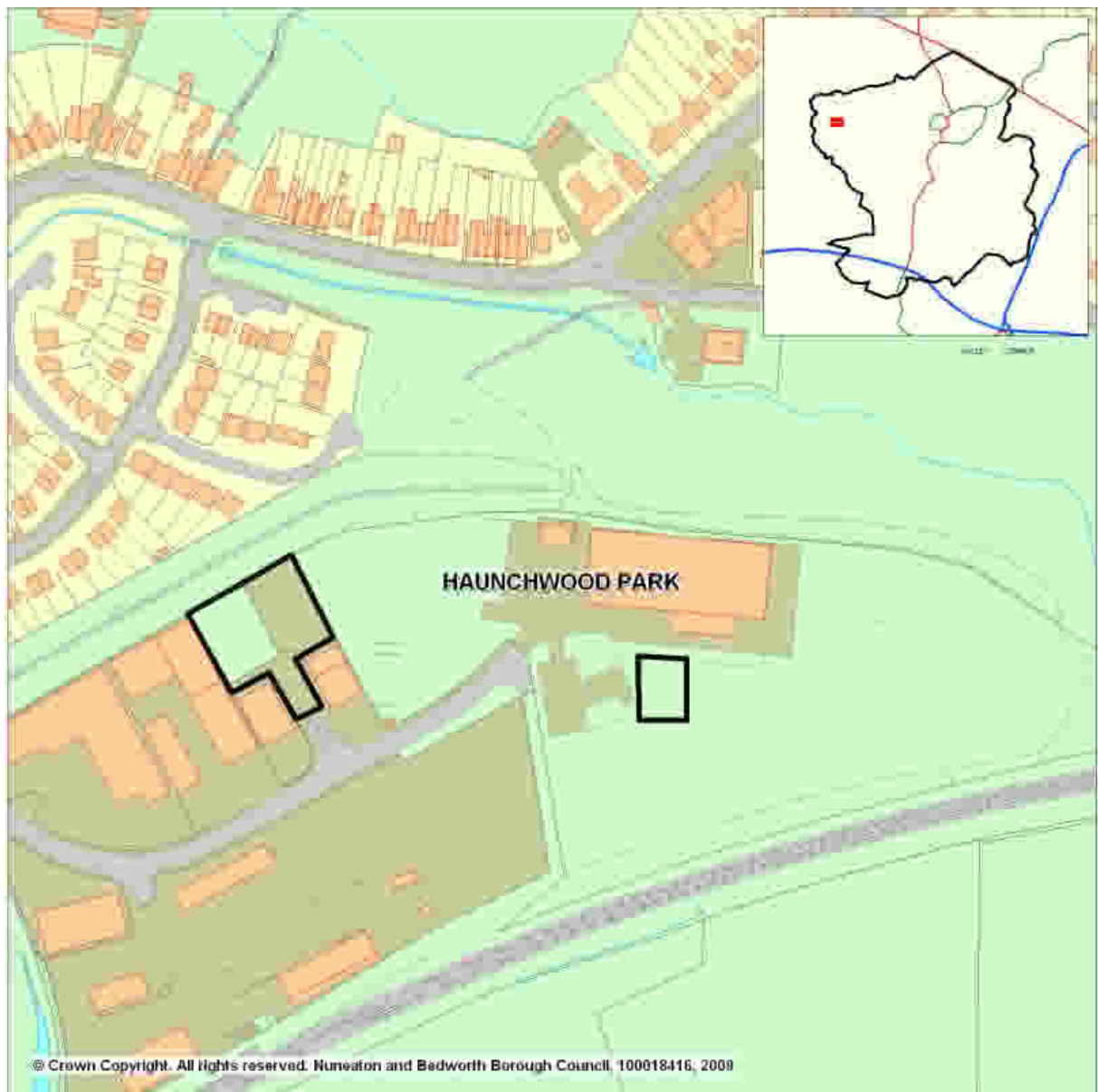
P8 - Colliery Lane, Bayton Road Industrial Estate, Bedworth



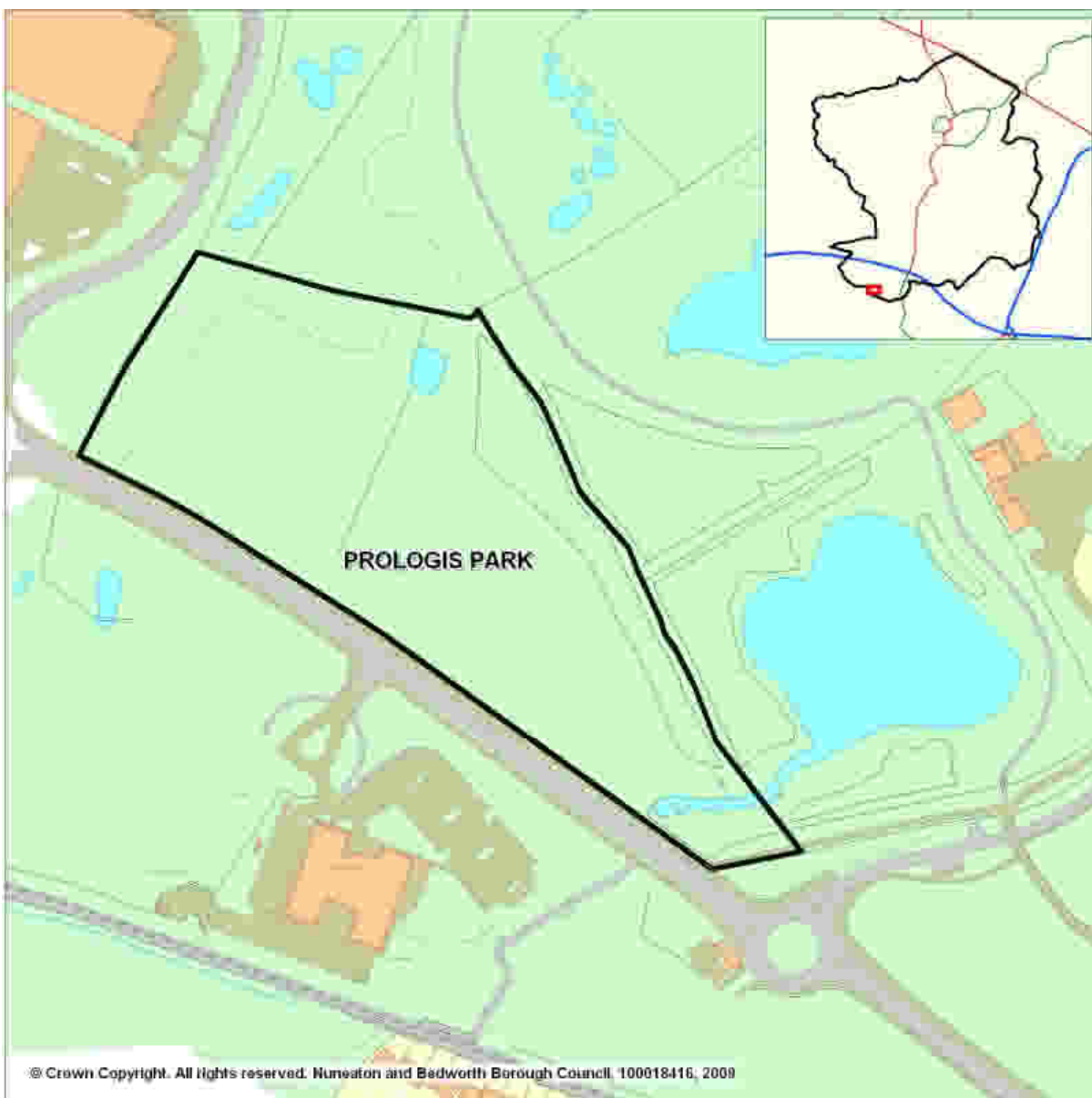
P9 - Camp Hill Urban Village - Midland Quarry Phase 4



P10 & P33 - Haunchwood Park Drive Nuneaton



P11 - Prologis Park



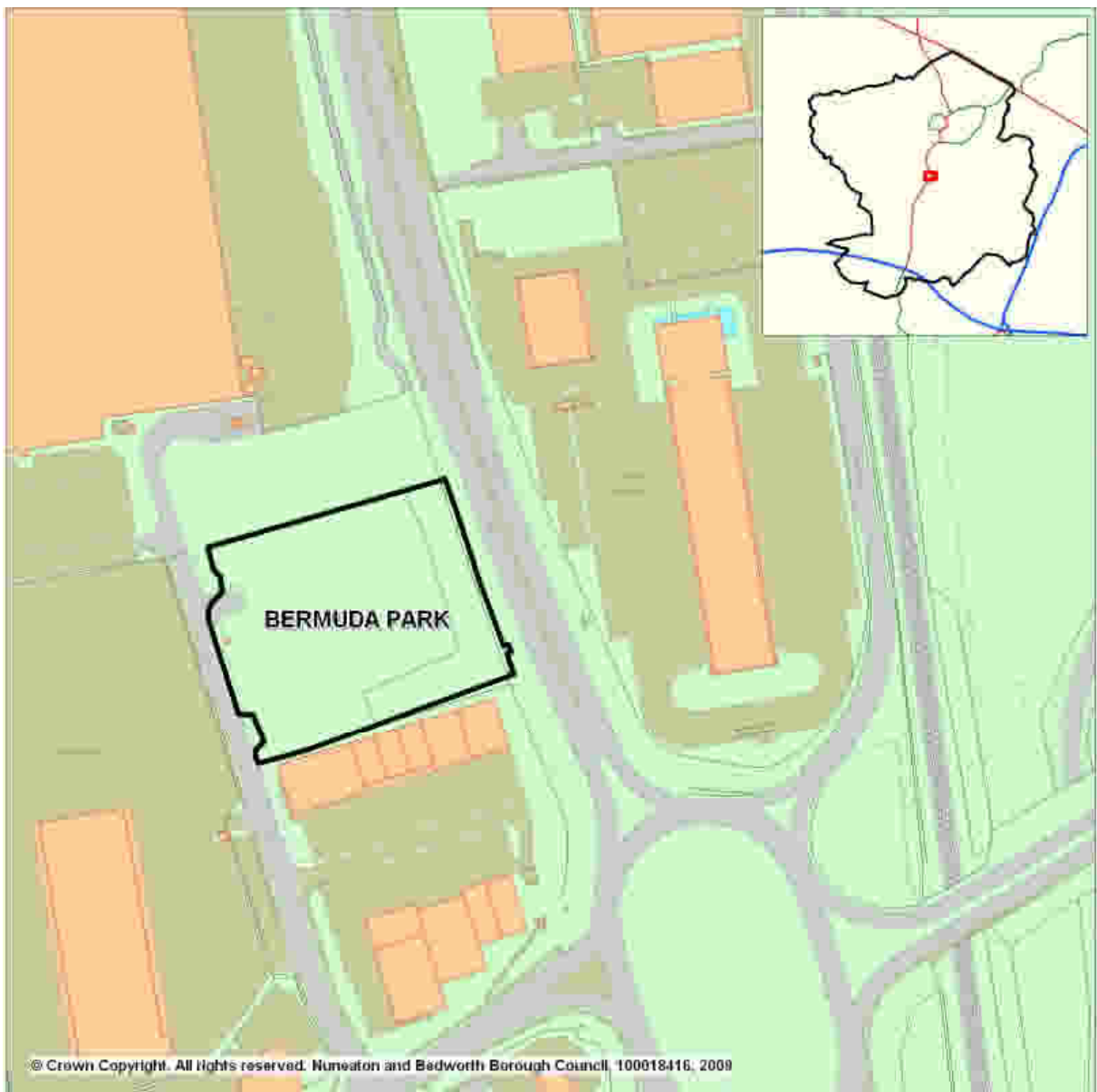
P12 - Bermuda Park



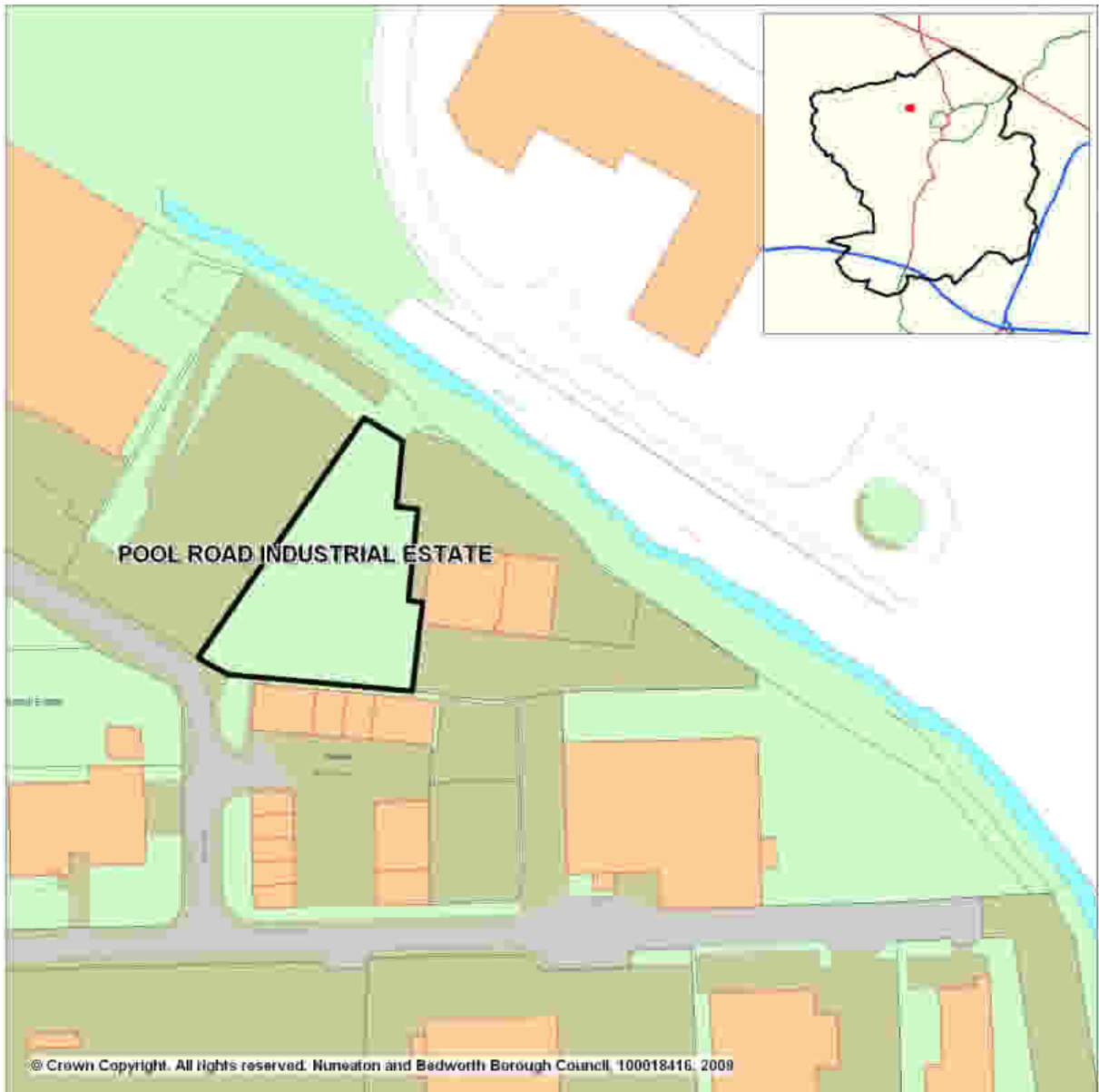
P13, P14 & P26 - Hemdale Business Park



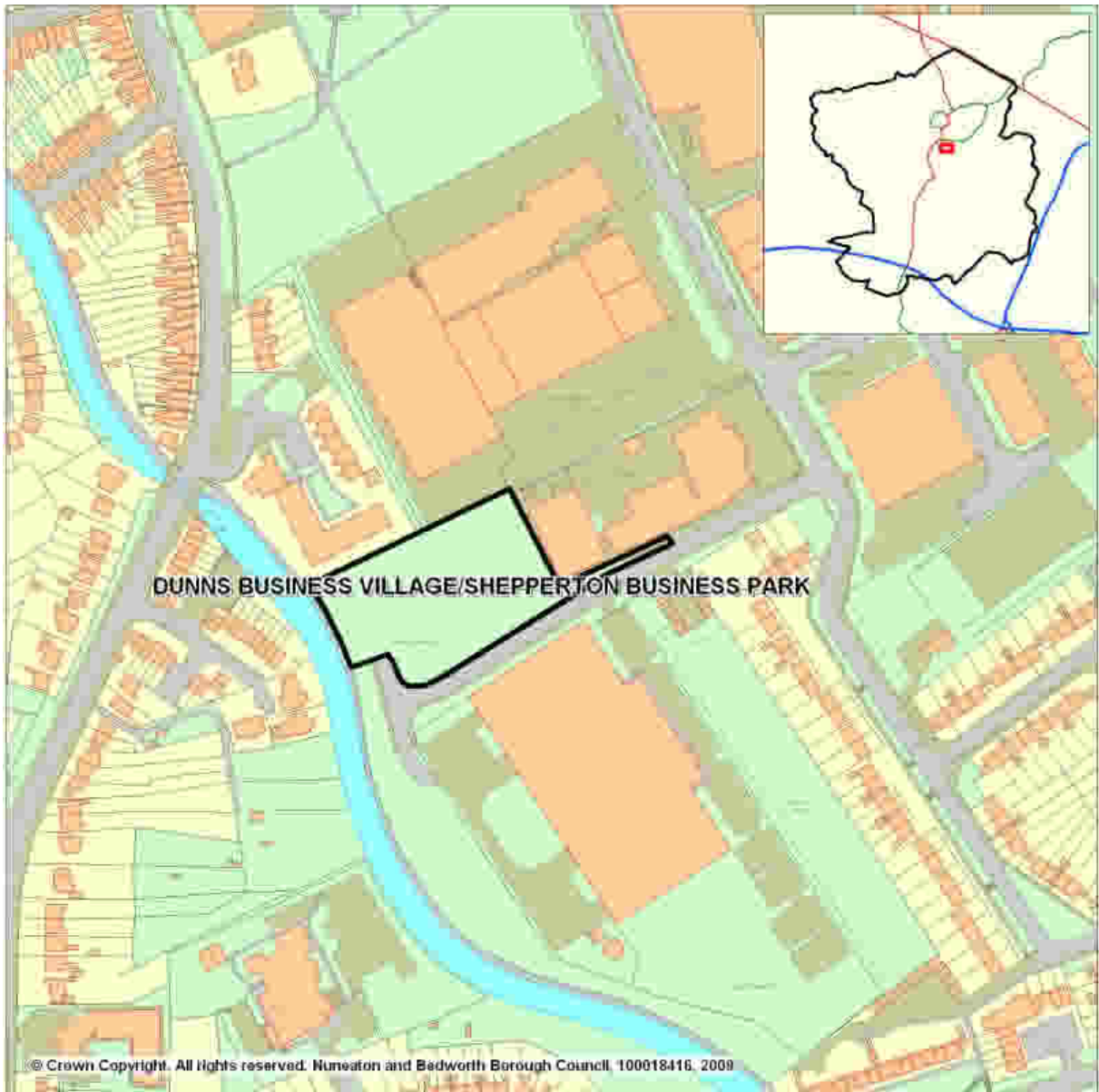
P15 - Bermuda Park



P18 - Pool Road Industrial Estate



P19 - Shepperton Business Park



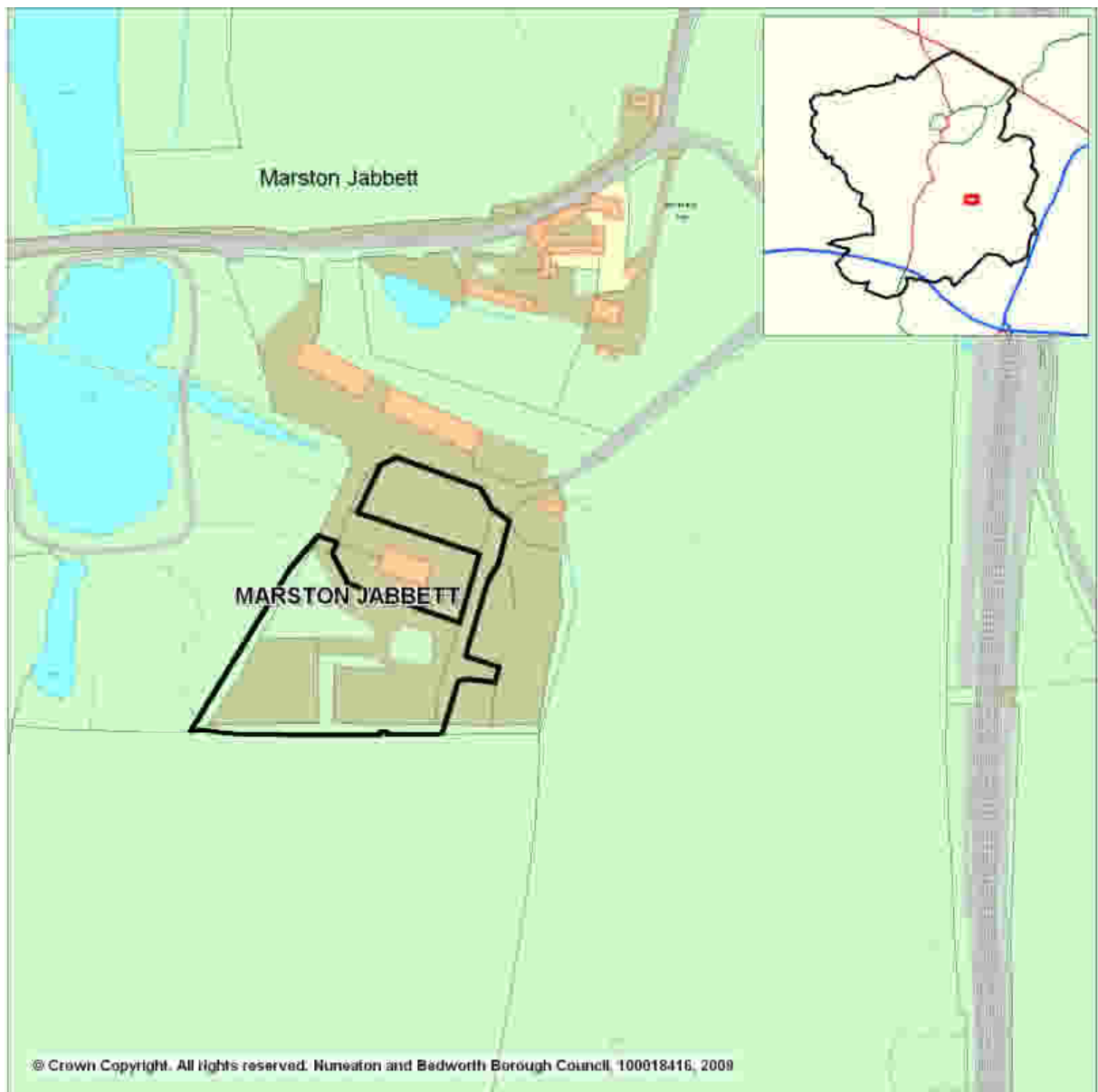
P20 - Bayton Road Industrial Estate



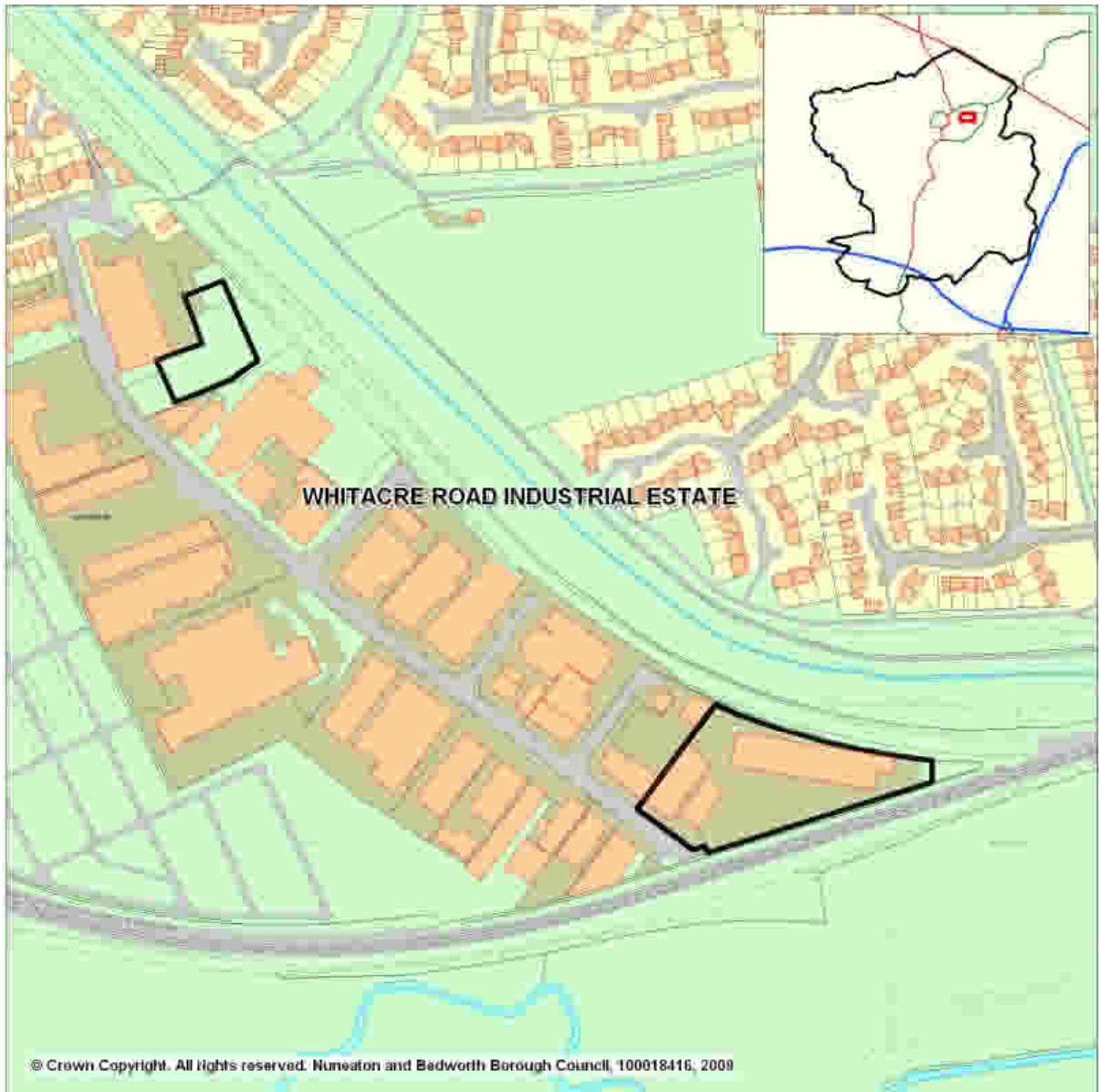
P21 - Camp Hill Urban Village



P22 - Marston Jabbett



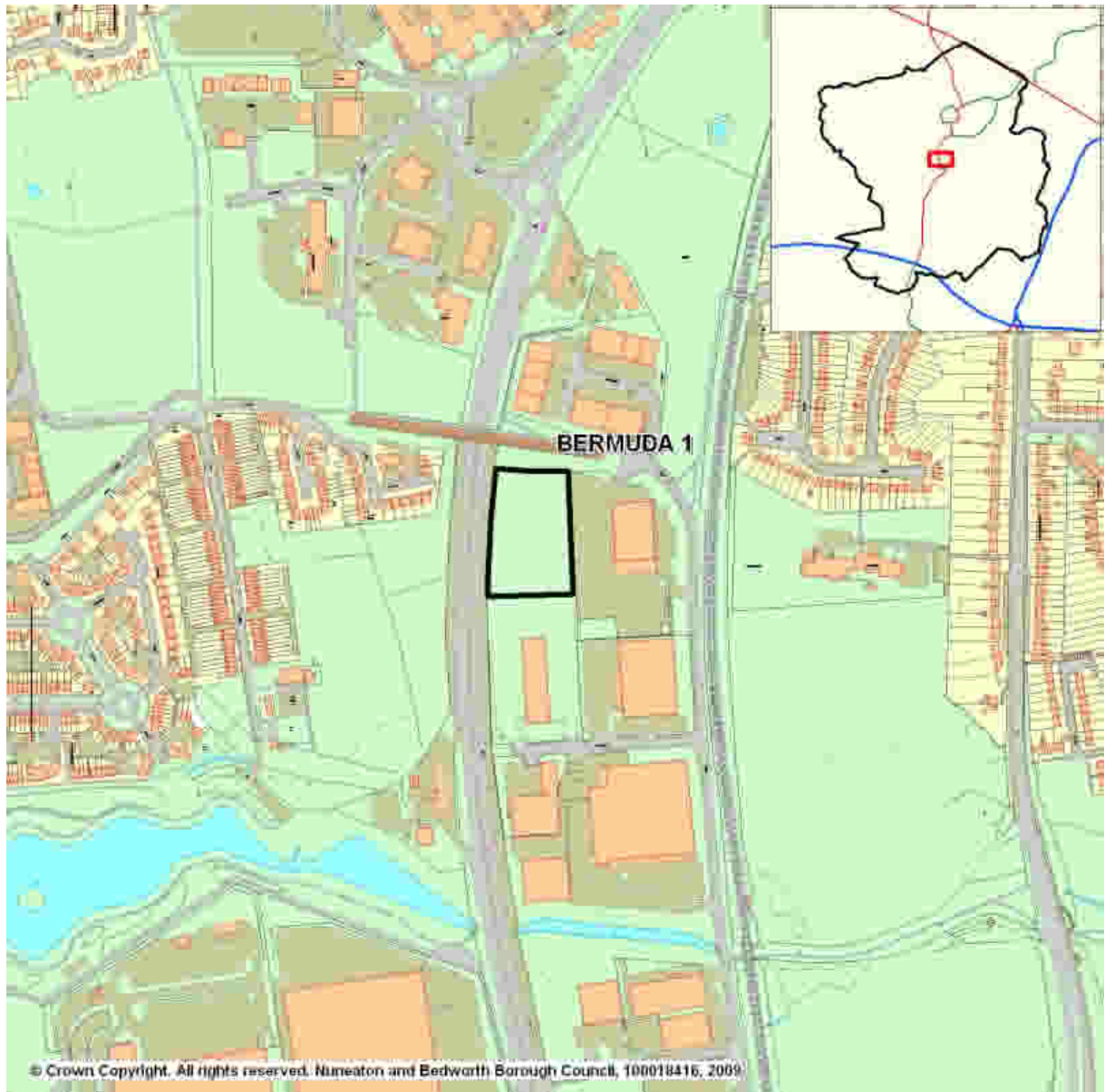
P23 & P35 - Whitacre Road Industrial Estate



P24 - Prologis Park



P27 - Bermuda 1



P30, P31 & P32 - Bayton Road Industrial Estate



APPENDIX B – PROFORMA FOR ASSESSMENT OF EXISTING EMPLOYMENT SITES

Existing Employment Areas Proforma

Site Ref No

Address

Criteria	Score	Notes
Typology	<input style="width: 30px; height: 30px; border: 1px solid black;" type="text"/>	<p>1 – An industrial estate owned and managed as an investment likely to have similar types of buildings, etc. 2 – Other industrial areas dominated by owner occupiers interwoven with other small industrial estates.</p>
Building Age	<input style="width: 30px; height: 30px; border: 1px solid black;" type="text"/>	<p>1 – Pre 1945 2 – 1945 – 1960, post war but likely to have similar characteristics 3 – 1960-1980 more modern buildings portal frame with modern car parking emerging 4 – 1980-2006 modern buildings good specification and car parking</p>
Building Quality	<input style="width: 30px; height: 30px; border: 1px solid black;" type="text"/>	<p>5 – Good condition – lower than normal level of maintenance requirement within medium term. 4 – Satisfactory condition – normal level of maintenance and repair requirement within the medium term. 3 – Fair condition – capable of attracting satisfactory condition rating but with a notable backlog of maintenance and /or technical upgrading works required within the medium term. 2 – Poor condition – major repair and /or technical work required in the short term but capable of attaining with expenditure that does not exceed 50% of replacement cost. 1 – Very poor condition – as per as poor condition but level of expenditure required to obtain satisfactory condition exceeds 50% of replacement cost.</p>
General External Environment	<input style="width: 30px; height: 30px; border: 1px solid black;" type="text"/>	<p>5 – Excellent quality environment – extensive external public realm areas well maintained, road maintenance no issues, buildings of high quality external appearance for use, no derelict sites, vacant plots maintained. 4 – High quality – less extensive landscaping but public realm maintained, road maintenance adequate but minor defects, buildings of appropriate quality, no derelict sites but vacant plots need some maintenance. 3 – Average quality – few landscaped areas, and where present maintenance required. Buildings of average quality for use. Road maintenance some significant repairs needed, some derelict sites but not highly visible, vacant plots untidy and requiring major improvement. 2 – Below average quality – maintenance of public realm poor, extensive repairs needed to roads, some open storage uses – vacant plots appear abandoned, buildings of below average quality. 1 – Very poor /poor quality – evidence of fly tipping in public areas, roads system in need of complete overhaul, major /derelict sites, buildings of very poor /poor quality even taking use. Numerous open storage uses presenting poor image.</p>
Level of Visible Voids	<input style="width: 30px; height: 30px; border: 1px solid black;" type="text"/>	<p>5 – 90 – 100% of buildings occupied 4 – 80% - 90% of buildings occupied 3 – 60 – 80% of buildings occupied 2 – 40% - 60% of buildings occupied 1 – less than 40% of buildings occupied</p>

Nature of Existing Tenants

	<p>5 – National /international names: significant presence. 4 – Some national /international names present, but majority of occupiers from drawn from regional companies. 3 – No national /international names companies exclusively Warwickshire based. 2 – Companies drawn from local area but could be seen as having choice of locations in local area. 1 – Very local companies who by nature of their business would be expected to have very limited choices in terms of alternative location.</p>
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Market Attractiveness

	<p>3. Site attractive to National companies 2. Site attractive to Sub-regional companies 1. Site attractive to Local companies</p>
--	--

Accessibility Strategic

	<p>5 – 0 -5 minutes drive time 4 – 5-10 minutes drive time 3 – 10-20 minutes drive time 2 – 20-30 minutes drive time 1 – 30 minutes plus</p>
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Access Local

	<p>5 – easy site access no issues available public transport 4 – No access for issues for vehicles but no public transport 3 – Easy immediate site access but wider issues on link to strategic highway net work 2 – Restricted access for HGV's and restricted access to major road network 1 – restricted access by all commercial vehicles not public transport</p>
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Local Amenities

	<p>5. Close to a town centre with a wide range of services (5 different services or more) 4. Close to local centre with a reasonable range of services (4 different services) 3. Close to a limited range of basic services (3 different services) 2. Close to one or two services 1. No services in close proximity NB1: Employment related services such as banks, travel agents, shops, leisure/recreation, pubs/restaurants. NB2: "Close" = within about 10 minutes walk</p>
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Public Transport

	<p>5. Close to a station, peak time bus route and cycle route; on a pedestrian route 4. Close to a station or peak time bus route, close to cycle route, on a pedestrian route 3. Close to either a station or peak time bus route or cycle route; on a pedestrian route 2. Not near a station, peak time bus route or cycle route; on a pedestrian route 1. Not on a pedestrian route; not near a station, peak time bus route or cycle route NB1. "Close" = within about 10 minutes walk NB2. Peak time bus route defined as being a frequency of 2 buses per hour or more (Mon – Fri).</p>
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APPENDIX C – EXISTING EMPLOYMENT SITE ASSESSMENTS

Existing Employment Site Assessments

NBBC Map Ref	GVA Ref	Site Name	Total Site Area (from GIS) (ha)	WMRSS Typology	Building Age	Building Quality	External Environment	Visible Voids	Nature of Tenants	Market Attractiveness	Strategic Accessibility	Local Access	Local Amenities	Public Transport	Market Score	Physical Score	Sustainability Score	Total Score	Market Ranking	Physical Ranking	Sustainability Ranking
1	E 1	Pool Road Business Centre	0.26	Other	4	4	3	4	2	1	2	5	4	3	21	16	9	32	Average	Good	Average
1	E 2	Pool Road Industrial Estate	7.40	Good Quality	3	3	2	4	2	1	2	5	4	3	19	13	9	29	Average	Good	Average
3	E 3	Midland Road Rail Network	2.22	Good Quality	3	3	2	4	5	1	3	5	2	3	23	13	8	31	Good	Good	Average
4	E 4	Aston Industrial Estate	0.58	Good Quality	2	2	2	5	2	1	2	2	4	3	16	8	9	25	Average	Average	Average
5	E 5	Bath Road	0.57	Good Quality	2	2	2	1	2	1	3	2	4	5	13	8	12	24	Poor	Average	Excellent
6	E 6	St Mary's Road	1.76	Good Quality	3	3	4	4	2	1	3	2	5	3	19	12	11	30	Average	Good	Good
7	E 7	Weddington	3.03	Good Quality	4	3	2	4	4	2	3	2	4	4	20	11	11	32	Average	Good	Good
8	E 8	Oaston Road	0.90	Good Quality	2	2	2	4	2	1	3	5	1	3	19	11	7	25	Average	Good	Average
8	E 9	Witacre Road	9.39	Good Quality	3	3	2	3	2	1	3	2	5	5	16	10	13	29	Average	Average	Excellent
9	E 10	Attleborough Fields	31.66	Sub-regional	4	4	3	4	4	2	3	4	2	3	24	15	8	33	Good	Good	Average
9	E 11	Hemdale Business Park	5.06	Good Quality	4	5	3	3	4	3	3	5	3	3	26	17	9	36	Good	Excellent	Average
10	E 12	Seymour Road	1.06	Good Quality	3	3	2	3	2	1	3	2	3	3	16	10	9	25	Average	Average	Average
11	E 13	Trident Business Park 1	1.38	Good Quality	4	4	3	4	3	2	3	2	4	3	21	13	10	32	Average	Good	Good
11	E 14	Trident Business Park 2	0.96	Good Quality	3	3	2	3	2	1	3	2	4	3	16	10	10	26	Average	Average	Good
12	E 15	Caldwell Road Industrial Estate 1	4.70	Good Quality	4	5	4	1	4	2	4	5	2	3	25	18	9	34	Good	Excellent	Average
12	E 16	Caldwell Road Industrial Estate 2	2.52	Good Quality	4	3	3	5	5	2	4	5	2	3	27	15	9	36	Good	Good	Average
12	E 17	Caldwell Road Industrial Estate 3	0.80	Good Quality	2	2	2	3	2	1	4	4	2	3	18	10	9	25	Average	Average	Average
12	E 18	Shepperton / Centrovell	2.66	Good Quality	4	4	3	5	4	2	4	5	2	3	27	16	9	36	Good	Good	Average
13	E 19	Marston Jabbett	2.56	Good Quality	4	4	2	5	2	1	3	2	1	1	19	12	5	25	Average	Good	Average
14	E 20	Bayton Road Industrial Estate 1	23.86	Sub-regional	4	5	4	5	4	2	4	5	4	3	29	18	11	40	Excellent	Excellent	Good
14	E 21	Bayton Road Industrial Estate 2	46.44	Sub-regional	3	3	3	4	2	2	5	5	4	3	24	14	12	34	Good	Good	Excellent
14	E 22	Grovelands Industrial Estate	7.22	Good Quality	2	2	2	5	3	1	5	5	4	3	23	11	12	32	Good	Good	Excellent
14	E 23	Part of Blackhorse Road Industrial Estate	2.24	Good Quality	2	2	2	5	2	1	4	5	4	3	21	11	11	30	Average	Good	Good
14	E 24	School Lane	1.08	Good Quality	3	4	4	5	3	2	5	5	4	3	28	16	12	38	Good	Good	Excellent
15	E 25	The Moorings Business Park	2.99	Good Quality	4	4	2	5	3	2	5	5	4	3	26	15	12	37	Good	Good	Excellent
16	E 26	Blackhorse Road Industrial Estate	0.23	Other	2	3	3	4	2	1	4	2	3	3	19	10	10	27	Average	Average	Good
17	E 27	Hawkesbury Lane Industrial Centre	0.28	Other	3	3	2	4	2	1	4	2	3	3	18	10	10	27	Average	Average	Good
18	E 28	Gallagher Business Park	9.88	Good Quality	4	4	5	3	5	3	5	4	1	3	29	17	9	37	Excellent	Excellent	Average
19	E 29	Prologis Park	16.16	Sub-regional	4	5	5	4	5	3	5	5	2	3	32	19	10	41	Excellent	Excellent	Good
20	E 30	Bermuda Industrial Estate 1	53.51	Sub-regional	4	5	5	5	5	3	5	4	3	3	32	18	11	42	Excellent	Excellent	Good
20	E 31	Eliot Park	5.17	Good Quality	4	5	4	4	4	3	4	5	3	3	29	18	10	39	Excellent	Excellent	Good
20	E 32	St Georges	18.01	Sub-regional	4	4	4	4	4	3	5	4	2	3	28	16	10	37	Good	Good	Good
21	E 33	Hazell Way Industrial Estate	8.60	Good Quality	3	3	3	4	2	1	4	2	2	3	19	11	9	27	Average	Good	Average
22	E 34	Tenlons Road Industrial Estate	4.14	Good Quality	2	3	3	4	2	1	4	2	3	3	19	10	10	27	Average	Average	Good
23	E 35	Haunchwood	6.09	Good Quality	4	5	3	5	4	2	3	5	3	3	27	17	9	37	Good	Excellent	Average
27	E 36	King Edward Road	0.73	Good Quality	3	3	2	5	2	1	3	5	5	5	21	13	13	34	Average	Good	Excellent
28	E 37	Justice Centre	0.97	Good Quality	4	5	3	5	5	3	3	5	5	5	29	17	13	43	Excellent	Excellent	Excellent
29	E 38	Anker Street	0.41	Good Quality	2	3	2	5	3	1	3	5	5	5	22	12	13	34	Good	Good	Excellent
31	E 39	Newton Road	0.39	Other	1	2	2	5	3	1	4	2	5	3	19	7	12	28	Average	Average	Excellent
32	E 40	Heritage Business Centre	0.23	Other	3	3	3	5	2	1	4	5	1	3	23	14	8	30	Good	Good	Average
7	E 41	Weddington Road	0.68	Good Quality	3	4	4	5	3	2	3	2	4	4	23	13	11	34	Good	Good	Good
19	E 42	Ashbrook Court	1.96	Good Quality	4	5	5	4	5	3	5	5	2	3	32	19	10	41	Excellent	Excellent	Good
2	E 43	Tuttle Hill	0.54	Good Quality	1	2	2	5	2	1	3	5	1	3	20	10	7	25	Average	Average	Average

APPENDIX D – METHODOLOGY FOR RANKING OF EXISTING EMPLOYMENT SITES

Methodology for Ranking of Existing Employment Sites

Introduction

This note outlines the methodology we have used to rank each of the existing employment sites within Nuneaton and Bedworth, as part of the baseline study for the Nuneaton and Bedworth Borough Employment Land Review.

The key steps and assumptions are outlined below. For each we describe the methodology for ranking each site or area, and explain the assumptions we have made.

This note accompanies the schedules of sites and areas, which detail how we have scored each site and its subsequent rank.

Existing Employment Sites

For existing employment sites, the factors we have taken into account are detailed in Table 1.1 below, together with our notes for scoring them.

Table 1.1 - Employment Area Scoring Criteria

Criteria	Reference	Notes for scoring
Typology	A1	1 – An industrial estate owned and managed as an investment likely to have similar types of buildings, etc. 2 – Other industrial areas dominated by owner occupiers interwoven with other small industrial estates.
Building Age	A2	1 – Pre 1945 2 – 1945 – 1960, post war but likely to have similar characteristics 3 – 1960-1980 more modern buildings portal frame with modern car parking emerging 4 – 1980-2006 modern buildings good specification and car parking
Building Quality	A3	5 – Good condition – lower than normal level of maintenance requirement within medium term. 4 – Satisfactory condition – normal level of maintenance and repair requirement within the medium term. 3 – Fair condition – capable of attracting satisfactory condition rating but with a notable backlog of maintenance and /or technical upgrading works required within the medium term. 2 – Poor condition – major repair and /or technical work required in the short term but capable of attaining with expenditure that does not exceed 50% of replacement cost. 1 – Very poor condition – as per as poor condition but level of expenditure required to obtain satisfactory condition exceeds 50% of replacement cost.
General External Environment	A4	5 – Excellent quality environment – extensive external public realm areas well maintained, road maintenance no issues, buildings of high quality external appearance for use, no derelict sites, vacant plots maintained. 4 – High quality – less extensive landscaping but public realm maintained, road maintenance adequate but minor defects, buildings of appropriate quality, no derelict sites but vacant plots need some maintenance. 3 – Average quality – few landscaped areas, and where present maintenance required. Buildings of average quality for use. Road maintenance some significant repairs needed, some derelict sites but not highly visible, vacant plots untidy and requiring major improvement. 2 – Below average quality – maintenance of public realm poor, extensive repairs needed to roads, some open storage uses – vacant plots appear abandoned, buildings of below average quality. 1 – Very poor /poor quality – evidence of fly tipping in public areas, roads system in need of complete overhaul, major /derelict sites, buildings of very poor /poor quality even taking use. Numerous open storage uses presenting poor image.
Level of Visible Voids	A5	5 – 90 – 100% of buildings occupied 4 – 80% - 90% of buildings occupied 3 – 60 – 80% of buildings occupied 2 – 40% - 60% of buildings occupied 1 – less than 40% of buildings occupied
Nature of Existing Tenants	A6	5 – National /international names: significant presence. 4 – Some national /international names present, but majority of occupiers from drawn from regional companies. 3 – No national /international names companies exclusively Warwickshire based. 2 – Companies drawn from local area but could be seen as having choice of locations in local area. 1 – Very local companies who by nature of their business would be expected to have very limited choices in terms of alternative location.
Market Attractiveness	A7	5 – National /international companies 4 – National and regional companies 3 – Regional companies 2 – Local but district wide companies 1 – Companies with a very local limited choice of locations
Accessibility Strategic	A8	5 – 0 -5 minutes drive time 4 – 5-10 minutes drive time 3 – 10-20 minutes drive time 2 – 20-30 minutes drive time 1 – 30 minutes plus
Access Local	A9	5 – easy site access no issues public transport within 400m 4 – No access issues for vehicles but no public transport within 400m 3 – Easy immediate site access but wider issues on link to strategic highway network 2 – Restricted access for HGV's and restricted access to major road network 1 – restricted access by all commercial vehicles no public transport

Criteria	Reference	Notes for scoring
Local Amenities	A10	5. Close to a town centre with a wide range of services (5 different services or more) 4. Close to local centre with a reasonable range of services (4 different services) 3. Close to a limited range of basic services (3 different services) 2. Close to one or two services 1. No services in close proximity NB1: Employment related services such as banks, travel agents, shops, leisure/recreation, pubs/restaurants. NB2: "Close" = within about 10 minutes walk
Public Transport	A11	5. Close to a station, peak time bus route and cycle route; on a pedestrian route 4. Close to a station or peak time bus route, close to cycle route, on a pedestrian route 3. Close to either a station or peak time bus route or cycle route; on a pedestrian route 2. Not near a station, peak time bus route or cycle route; on a pedestrian route 1. Not on a pedestrian route; not near a station, peak time bus route or cycle route NB1: "Close" = within about 10 minutes walk NB2: Peak time bus route defined as being a frequency of 2 buses per hour or more (Mon – Fri).

In order to rank the employment areas we have assessed various criteria together in order to come up with a "market lead" rank, a "physical lead" rank and a "sustainability lead" rank. This allows different aspects of the employment areas to be assessed against each other. The criteria that we have used to come up with each rank are detailed below.

Existing Employment Site Assessments

Market Factors: A3, A4, A5, A6, A7, A8, A9

Max score: 35

Scores / Ranking

Ranking	Score	Notes
Poor	Less than 15	
Average	15 – 21	No more than four poor scores
Good	22 – 28	No more than three poor scores
Excellent	29 – 35	No more than two poor scores

* A poor score is defined as being a score of 2 or less in any criteria.

Physical Factors: A2, A3, A4, A9

Max Score: 19

Scores / Ranking

Ranking	Score	Notes
Poor	Less than 8	
Average	8 – 11	No more than three poor scores
Good	12 – 15	No more than two poor scores
Excellent	16 – 19	No more than one poor score

* A poor score is defined as being a score of 2 or less in any criteria.

Sustainability Factors: A8, A10, A11

Max score: 15

Scores / Ranking

Ranking	Score	Notes
Poor	Less than 7	
Average	7 – 9	No more than two poor scores
Good	10 – 12	No more than one poor score
Excellent	13 – 15	No poor scores

* A poor score is defined as being a score of 2 or less in any criteria.

APPENDIX E – PROFORMA FOR ASSESSMENT OF PROPOSED EMPLOYMENT SITES

Employment Sites Proforma

Site Ref No

Address

Criteria	Score	Notes
Availability	<input style="width: 40px; height: 20px;" type="text"/>	Yes – Site is advertised as being available, or there are no obvious obstructions to immediately develop the site. No – Site is not immediately available (please state reason why in space below)
Site Ownership	<input style="width: 40px; height: 20px;" type="text"/>	Please note Site Ownership Details if available
Market Activity (any in last 5 years)	<input style="width: 40px; height: 20px;" type="text"/>	Yes – Evidence of recent development in the immediate surrounding area (e.g. on the same part of an estate or road) No – No evidence of recent development. If the site is a new (Greenfield) site please state below whether it would be attractive to the market at present
Access	<input style="width: 40px; height: 20px;" type="text"/>	5. Either adjoining main road or motorway junction with easy site access for all vehicles or access to rail, air and sea networks 4. Close to major road network; easy site access for all vehicles 3. Easy site access for all vehicles; indirect or restricted access to major road network 2. Restricted access for HGVs; restricted access to major road network 1. Restricted access for all commercial vehicles, severely restricted access to major road network
Public Transport	<input style="width: 40px; height: 20px;" type="text"/>	5. Close to a station, peak time bus route and cycle route; on a pedestrian route 4. Close to a station or peak time bus route, close to cycle route, on a pedestrian route 3. Close to either a station or peak time bus route or cycle route; on a pedestrian route 2. Not near a station, peak time bus route or cycle route; on a pedestrian route 1. Not on a pedestrian route; not near a station, peak time bus route or cycle route NB1: "Close" = within about 10 minutes walk NB2: Peak time bus route defined as being a frequency of 2 buses per hour or more (Mon – Fri).
Prominence	<input style="width: 40px; height: 20px;" type="text"/>	5. Gateway site to a prominent estate, visible from major road network 4. Visible site, on a main road or prominent estate 3. On a main road or prominent estate, tucked away from view 2. Visible, on a minor road or estate 1. On a minor road or estate, tucked away from view
Local Amenities	<input style="width: 40px; height: 20px;" type="text"/>	5. Close to a town centre with a wide range of services (5 different services or more) 4. Close to local centre with a reasonable range of services (4 different services) 3. Close to a limited range of basic services (3 different services) 2. Close to one or two services 1. No services in close proximity NB1: Employment related services such as banks, travel agents, shops, leisure/recreation, pubs/restaurants. NB2: "Close" = within about 10 minutes walk
Site Layout	<input style="width: 40px; height: 20px;" type="text"/>	5. Clear plot, no obstructions 4. Regular shaped plot, obstructed 3. Regular shaped plot, fragmented 2. Irregular shaped plot, obstructed 1. Irregular shaped plot, fragmented NB1: "Obstructed" = physical obstruction running through the site (e.g. watercourse, ditch, overhead power lines) NB2: "Fragmented" = site is fragmented by other uses or via a road.
Character of Area	<input style="width: 40px; height: 20px;" type="text"/>	5. Well established commercial area 4. Established commercial area, with residential area or rural area nearby 3. Mixed commercial and residential area 2. Mainly residential or rural area with few commercial uses 1. Mainly residential or rural area with no existing commercial uses
Planning Status	<input style="width: 40px; height: 20px;" type="text"/>	5. Detailed planning permission 4. Outline planning permission 3. Published development brief 2. Allocated / Protected in Local Plan 1. Allocation in Deposit Draft Local Plan, or reserve site
Economic Constraints	<input style="width: 40px; height: 20px;" type="text"/>	5. No obstacles to development 4. Minor obstacles to development; relatively easy, quick and cheap to resolve 3. Minor obstacles to development; more difficult, expensive and time-consuming to resolve 2. Major obstacles to development; very difficult, expensive and time-consuming to resolve 1. Major obstacles to development; extremely difficult, expensive and time-consuming to resolve NB: Obstacles to development would include access difficulties, infrastructure requirements, contamination remediation costs, topography etc.
Strategic Location	<input style="width: 40px; height: 20px;" type="text"/>	5. Motorway Corridor (within 5 minutes of a junction) 4. Other Strategic Roads (within 5 minute drive time) 3. Sub-regional Centres 2. Other Towns 1. All other sites
Greenfield / Brownfield	<input style="width: 40px; height: 20px;" type="text"/>	1. Site is on Greenfield Land 2. Site is on Brownfield Land
Market Attractiveness	<input style="width: 40px; height: 20px;" type="text"/>	3. Site attractive to National companies 2. Site attractive to Sub-regional companies 1. Site attractive to Local companies

APPENDIX F – ASSESSMENT OF PROPOSED EMPLOYMENT SITES

GVA Ref	Name	Total Site Area (from GIS)	Availability	Market Activity (any in last 5 years)	Access	Public Transport	Prominence	Local Amenities	Site Layout	Character of Area	Planning Status	Economic Constraints	Strategic Location	Greenfield / Brownfield	Market Attractiveness	Market score	Physical score	Sustainability score	Total Score	Market Ranking	Physical Ranking	Sustainability Ranking
P 1	Midland Quarry Tuttle Hill (North Of)	15.61	Yes	No	3	4	3	3	3	3	2	2	4	2	2	20	6	11	31	Good	Average	Good
P 2	Judkins Tuttle Hill	0.27	Yes	No	3	4	3	3	3	3	2	2	4	2	1	19	6	11	30	Average	Average	Good
P 3	Paradise Farm	1.6	Yes	Yes	5	4	4	4	5	5	4	4	4	1	3	30	10	12	43	Excellent	Excellent	Good
P 4	Griff Clara	4.66	No	Yes	4	4	3	3	4	5	4	3	4	2	3	26	8	11	39	Good	Good	Good
P 5	Griff Clara	0.78	No	Yes	4	4	3	3	4	5	4	3	4	2	3	26	8	11	39	Good	Good	Good
P 6	Bermuda Park	0.67	No	Yes	4	4	3	3	4	5	4	3	4	2	3	26	8	11	39	Good	Good	Good
P 7	Griff Clara	4.31	No	Yes	4	4	3	3	4	5	4	3	4	2	3	26	8	11	39	Good	Good	Good
P 8	Colliery Lane, Bayton Road Industrial Estate	0.59	No	Yes	4	3	4	4	4	4	1	4	5	2	2	27	8	12	37	Good	Good	Good
P 9	Camp Hill Urban Village - Midland Quarry	2.09	Yes	Yes	5	4	2	4	4	3	3	3	4	2	2	23	9	12	36	Good	Excellent	Good
P 10	Haunchwood Park Drive Nuneaton	0.2	Yes	Yes	5	3	1	4	5	4	5	4	1	2	2	22	10	8	36	Good	Excellent	Average
P 11	Prologis Park	3.99	Yes	Yes	5	3	4	2	5	5	5	4	5	1	3	31	10	10	42	Excellent	Excellent	Good
P 12	Bermuda Park	0.51	Yes	Yes	4	4	4	3	4	5	5	3	4	2	3	27	8	11	41	Good	Good	Good
P 13	Hemdale Business Park	0.18	Yes	Yes	5	3	3	3	4	4	4	3	4	2	3	26	9	10	38	Good	Excellent	Good
P 14	Hemdale	0.14	Yes	Yes	5	3	3	3	4	4	4	3	4	2	3	26	9	10	38	Good	Excellent	Good
P 15	Bermuda Park	1.3	Yes	Yes	4	4	4	3	4	5	5	3	4	2	3	27	8	11	41	Good	Good	Good
P 18	Pool Road Industrial Estate	0.2	Yes	Yes	5	4	2	4	4	3	4	3	4	2	2	23	9	12	37	Good	Excellent	Good
P 19	Shepperton Business Park	0.67	Yes	Yes	5	4	3	2	4	4	5	4	4	2	2	26	9	10	39	Good	Excellent	Good
P 20	Bayton Road Industrial Estate	0.21	No	Yes	4	3	4	4	4	4	1	4	5	2	2	27	8	12	37	Good	Good	Good
P 21	Camp Hill Urban Village	1.97	Yes	Yes	5	4	2	4	4	3	3	3	3	2	2	22	9	11	35	Good	Excellent	Good
P 22	Marston Jabbett	1	Yes	Yes	2	2	2	1	3	3	4	4	1	1	1	16	5	4	24	Average	Average	Poor
P 23	Whitacre Road Industrial Estate	0.79	Yes	Yes	2	5	4	3	4	5	5	4	4	2	2	25	6	12	40	Good	Average	Good
P 24	Prologis Park	0.49	Yes	Yes	5	3	4	2	5	5	5	4	5	1	3	31	10	10	42	Excellent	Excellent	Good
P 26	Hemdale Business Park Nuneaton	0.51	Yes	Yes	5	3	3	3	4	4	4	3	4	2	3	26	9	10	38	Good	Excellent	Good
P 27	Bermuda 1	0.88	Yes	Yes	4	4	4	3	4	5	5	3	4	2	3	27	8	11	41	Good	Good	Good
P 28	Paradise Farm	0.42	Yes	Yes	5	4	4	4	5	5	4	4	4	1	3	30	10	12	43	Excellent	Excellent	Good
P 30	Bayton Road Industrial Estate	0.11	No	Yes	5	3	4	4	4	4	1	4	5	2	2	28	9	12	38	Excellent	Excellent	Good
P 31	Bayton Road Industrial Estate	0.09	No	Yes	5	3	4	4	4	4	1	4	5	2	2	28	9	12	38	Excellent	Excellent	Good
P 32	Bayton Road Industrial Estate	0.13	No	Yes	5	3	4	4	4	4	1	4	5	2	2	28	9	12	38	Excellent	Excellent	Good
P 33	Haunchwood Park	0.05	Yes	Yes	5	3	1	4	5	4	5	4	1	2	2	22	10	8	36	Good	Excellent	Average
P 35	Whitacre Industrial Estate	0.21	Yes	Yes	2	5	4	3	4	5	5	4	4	2	2	25	6	12	40	Good	Average	Good

APPENDIX G – METHODOLOGY FOR RANKING OF PROPOSED EMPLOYMENT SITES

Methodology for Ranking of Proposed Employment Sites

Introduction

This note outlines the methodology we have used to rank each of the proposed employment sites within Nuneaton and Bedworth, as part of the baseline study for the Nuneaton and Bedworth Borough Employment Land Review.

The key steps and assumptions are outlined below. For each we describe the methodology for ranking each site or area, and explain the assumptions we have made.

This note accompanies the schedule of proposed employment sites, which details how we have scored each site and its subsequent rank.

Proposed Employment Sites

For proposed employment sites, the factors we have taken into account are detailed in Table 1.1 below, together with our notes for scoring them.

Table 1.1 - Employment Site Scoring Criteria

Criteria	Reference	Notes
Availability	A1	Yes – Site is advertised as being available, or there are no obvious obstructions to immediately develop the site. No – Site is not immediately available (please state reason why in space below)
Site Ownership	A2	Please note Site Ownership Details if available
Market Activity (any in last 5 years)	A3	Yes – Evidence of recent development in the immediate surrounding area (e.g. on the same part of an estate or road) No – No evidence of recent development. If the site is a new (Greenfield) site please state below whether it would be attractive to the market at present
Access	A4	5. Either adjoining main road or motorway junction with easy site access for all vehicles or access to rail, air and sea networks 4. Close to major road network; easy site access for all vehicles 3. Easy site access for all vehicles; indirect or restricted access to major road network 2. Restricted access for HGVs; restricted access to major road network 1. Restricted access for all commercial vehicles, severely restricted access to major road network
Public Transport	A5	5. Close to a station, peak time bus route and cycle route; on a pedestrian route 4. Close to a station or peak time bus route, close to cycle route, on a pedestrian route 3. Close to either a station or peak time bus route or cycle route; on a pedestrian route 2. Not near a station, peak time bus route or cycle route; on a pedestrian route 1. Not on a pedestrian route; not near a station, peak time bus route or cycle route NB1. "Close" = within about 10 minutes walk NB2. Peak time bus route defined as being a frequency of 2 buses per hour or more (Mon – Fri).
Prominence	A6	5. Gateway site to a prominent estate, visible from major road network 4. Visible site, on a main road or prominent estate 3. On a main road or prominent estate, tucked away from view 2. Visible, on a minor road or estate 1. On a minor road or estate, tucked away from view
Local Amenities	A7	5. Close to a town centre with a wide range of services (5 different services or more) 4. Close to local centre with a reasonable range of services (4 different services) 3. Close to a limited range of basic services (3 different services) 2. Close to one or two services 1. No services in close proximity NB1: Employment related services such as banks, travel agents, shops, leisure/recreation, pubs/restaurants. NB2: "Close" = within about 10 minutes walk
Site Layout	A8	5. Clear plot, no obstructions 4. Regular shaped plot, obstructed 3. Regular shaped plot, fragmented 2. Irregular shaped plot, obstructed 1. Irregular shaped plot, fragmented NB1. "Obstructed" = physical obstruction running through the site (e.g. watercourse, ditch, overhead power lines) NB2. "Fragmented" = site is fragmented by other uses or via a road.
Character of Area	A9	5. Well established commercial area 4. Established commercial area, with residential area or rural area nearby 3. Mixed commercial and residential area 2. Mainly residential or rural area with few commercial uses 1. Mainly residential or rural area with no existing commercial uses
Planning Status	A10	5. Detailed planning permission 4. Outline planning permission 3. Published development brief 2. Allocated / Protected in Local Plan 1. Allocation in Deposit Draft Local Plan, or reserve site
Economic Constraints	A11	5. No obstacles to development 4. Minor obstacles to development; relatively easy, quick and cheap to resolve 3. Minor obstacles to development; more difficult, expensive and time-consuming to resolve 2. Major obstacles to development; very difficult, expensive and time-consuming to resolve 1. Major obstacles to development; extremely difficult, expensive and time-consuming to resolve NB: Obstacles to development would include access difficulties, infrastructure requirements, contamination remediation costs, topography etc.

Criteria	Reference	Notes
Strategic Location	A12	5. Motorway Corridor (within 5 minutes of a junction) 4. Other Strategic Roads (within 5 minute drive time) 3. Sub-regional Centres (Nuneaton) 2. Other Large Towns (Bedworth) 1. All other sites
Greenfield / Brownfield	A13	1. Site is on Greenfield Land 2. Site is on Brownfield Land
Market Attractiveness	A14	3. Site attractive to National companies 2. Site attractive to Sub-regional companies 1. Site attractive to Local companies

In order to rank the proposed employment sites we have assessed various criteria together in order to come up with a “market lead” rank, a “sustainability lead” and a “physical lead” rank. This allows different aspects of the employment areas to be assessed against each other. The criteria that we have used to come up with each rank are detailed below.

Proposed Employment Sites Assessments

Market Factors: A4, A6, A8, A9, A11, A12, A14

Max score: 33

Scores / Ranking

Ranking	Score
Poor	Less than 11
Average	11 – 19
Good	20 – 27
Excellent	28 – 33

* If a site has four or more scores that are 2 or less (i.e. poor scores), then the site's ranking is reduced by one level (i.e. if a site is ranked as Average, but has four poor scores then it will be ranked as Poor).

Physical Factors: A4, A8

Max Score: 10

Scores / Ranking

Ranking	Score
Poor	Less than 4
Average	4 – 6
Good	7 – 8
Excellent	9 – 10

* If a site has two scores that are 2 or less (i.e. poor scores), then the site's ranking is reduced by one level (i.e. if a site is ranked as Average, but has two poor scores then it will be ranked as Poor).

Sustainability Factors: A5, A7, A12

Max score: 15

Scores / Ranking

Ranking	Score
Poor	Less than 5
Average	5 – 8
Good	9 – 12
Excellent	13 – 15

* If a site has two or more scores that are 2 or less (i.e. poor scores), then the site's ranking is reduced by one level (i.e. if a site is ranked as Average, but has two poor scores then it will be ranked as Poor).

APPENDIX H – CAPACITY ASSESSMENT OF PROPOSED EMPLOYMENT SITES

GVA Ref	Name	Total Site Area (from GIS)	Typology	Office / Technology Capacity (ha)	Industrial Capacity (ha)	Distribution Capacity (ha)	Total Land (excl Longstanding sites) (ha)
P 1	Midland Quarry Tuttle Hill (North Of)	15.61	B1/B2/B8	5.20	5.20	5.20	15.61
P 2	Judkins Tuttle Hill	0.27	B1/B2/B8	0.09	0.09	0.09	0.27
P 3	Paradise Farm	1.6	B1	1.60	0.00	0.00	1.60
P 4	Griff Clara Formerly Bermuda Industrial Estate	4.66	B2/B8	0.00	2.33	2.33	4.66
P 5	Griff Clara	0.78	B2/B8	0.00	0.00	0.00	0.00
P 6	Bermuda Park	0.67	B2/B8	0.00	0.00	0.00	0.00
P 7	Griff Clara	4.31	B2/B8	0.00	0.00	0.00	0.00
P 8	Colliery Lane Bedworth	0.59	B2/B8	0.00	0.30	0.30	0.59
P 9	Camp Hill Urban Village - Midland Quarry	2.09	B1/B2/B8	0.70	0.70	0.70	2.09
P 10	Haunchwood Park Drive Nuneaton	0.2	B2	0.00	0.20	0.00	0.20
P 11	Prologis Park	3.99	B2/B8	0.00	2.00	2.00	3.99
P 12	Bermuda Park	0.51	B2/B8	0.00	0.26	0.26	0.51
P 13	Hemdale Business Park	0.18	B2	0.00	0.18	0.00	0.18
P 14	Hemdale	0.14	B2	0.00	0.14	0.00	0.14
P 15	Bermuda Park	1.3	B2/B8	0.00	0.65	0.65	1.30
P 16	King Street Bedworth	0.12	B2	0.00	0.12	0.00	0.12
P 17	Gallagher Business Park	0.51	B1	0.51	0.00	0.00	0.51
P 18	Pool Road Industrial Estate	0.2	B2	0.00	0.20	0.00	0.20
P 19	Dunns Business Village/Shepperton Business Park	0.67	B1	0.67	0.00	0.00	0.67
P 20	Bayton Road Industrial Estate	4.03	B2/B8	0.00	2.02	2.02	4.03
P 21	Camp Hill Urban Village	1.97	B1/B2/B8	0.66	0.66	0.66	1.97
P 22	Marston Jabbett	1	B2/B8	0.00	0.50	0.50	1.00
P 23	Whitacre Road Industrial Estate	0.79	B2/B8	0.00	0.40	0.40	0.79
P 24	Prologis Park	0.49	B1/B2/B8	0.16	0.16	0.16	0.49
P 25	Bermuda 1	0.85	B2/B8	0.00	0.43	0.43	0.85
P 26	Hemdale Business Park Nuneaton	0.51	B2	0.00	0.51	0.00	0.51
P 27	Bermuda 1	0.88	B2/B8	0.00	0.44	0.44	0.88
P 28	Paradise Farm	0.42	B1	0.42	0.00	0.00	0.42
P 29	A444 Griff Way	0.37	B1	0.37	0.00	0.00	0.37
P 30	Bayton Road Industrial Estate	0.11	B2/B8	0.00	0.06	0.06	0.11
P 31	Bayton Road Industrial Estate	0.09	B2/B8	0.00	0.05	0.05	0.09
P 32	Bayton Road Industrial Estate	0.13	B2/B8	0.00	0.07	0.07	0.13
P 33	Haunchwood Park	0.05	B2	0.00	0.05	0.00	0.05
P 34	Corporation Street	0.01	B1	0.01	0.00	0.00	0.01
P 35	Whitacre Industrial Estate	0.21	B2	0.00	0.21	0.00	0.21
P 36	Camp Hill Urban Village Midland Quarry Tuttle Hill	1.7	B1/B2/B8	0.57	0.57	0.57	1.70

APPENDIX I – EMPLOYMENT SECTOR AND LAND USE GROUPINGS

Sector Group		Land Use Class (% of land required for employment)	Gross Internal Density (m2 per employee)	Conversion Factor: Internal to External	Gross External Density (m2 per employee)
M1	Food & Beverages	B2	34	1.035	35.19
M2	Wood & Wood Products	B2	34	1.035	35.19
M3	Printing & Publishing	B2	34	1.035	35.19
M4	Chemical, Plastic & Non-Metallic Materials/Products	B2	34	1.035	35.19
M5	Basic Metals	B2	34	1.035	35.19
M6	Metal Goods	B2	34	1.035	35.19
M7	Mechanical Engineering	B2	34	1.035	35.19
M8	Electronics, Electrical Engineering & Instruments	B1c (50%)	29	1.035	30.02
M8	Electronics, Electrical Engineering & Instruments	B1c (50%)	34	1.035	35.19
M9	Motor Vehicles & Other Transport Equipment	B2	34	1.035	35.19
M10	Manufacturing nes	B2	34	1.035	35.19
S1	Utilities	B1a (30%)	19	1.035	19.67
S2	Construction	B1a (33.3%)	19	1.035	19.67
S3	Wholesale Distribution	B8	50	1	50.00
S4	Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	B2	34	1.035	35.19
S5	Retailing	A1 (33.3%)	19	1.1	20.90
S5	Retailing	B1a (33.3%)	19	1.035	19.67
S5	Retailing	A2 (33.3%)	19	1.1	20.90
S6	Hotels & Catering	C1 (5%)	13	1.1	14.30
S6	Hotels & Catering	A3 (95%)	13	1.1	14.30
S7	Land Transport	B8 (65%)	80	1	80.00
S7	Land Transport	B8 (35%)	50	1	50.00
S8	Communications	B8	50	1	50.00
S9	Insurance, Banking & Finance	A2a (50%)	20	1.1	22.00
S9	Insurance, Banking & Finance	B1a (50%)	19	1.035	19.67
S10	Computing Services	B1a (45%)	19	1.035	19.67
S10	Computing Services	A2b (45%)	19	1.1	20.90
S10	Computing Services	A1 (10%)	19	1.1	20.90
S11	Real Estate & Professional Services	B1a (95%)	19	1.035	19.67
S11	Real Estate & Professional Services	B1b (5%)	29	1.035	30.02
S12	Other Business Services	B1a	19	1.035	19.67
S13	Public Administration & Defence	B1a	19	1.035	19.67
S14	Education	B1a (10%)	19	1.035	19.67
S15	Health & Social Work	B1a (15%)	19	1.035	19.67
S16	Recreational, Cultural & Sporting Activities	A2c	20	1.1	22.00
S17	Other Services	A2c (70%)	20	1.1	22.00
S17	Other Services	B1a (15%)	19	1.035	19.67
S17	Other Services	A2a/b (15%)	19	1.1	20.90

APPENDIX J – DETAILED EMPLOYMENT FORECASTS

Employment Projections - Nuneaton & Bedworth

Baseline Employment Projections

	2007 Actual	2011	2016	2021	2026
01 : Agriculture/Hunting, etc.	44	44	44	0	0
10 : Coal Mining, Peat Extraction	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	0	0	0
14 : Other mining and quarry	8	8	8	8	8
15 : Manf. - food and beverages	164	164	164	164	164
16 : Manf. - tobacco	0	0	0	0	0
17 : Manf. - textiles	91	46	0	0	0
18 : Manf. - wearing apparel	27	14	0	0	0
19 : Tanning and dressing of leather	0	0	0	0	0
20 : Manf. - wood products	125	125	63	63	63
21 : Manf. - pulp and paper products	3	3	2	2	2
22 : Publishing and Printing	126	63	63	63	63
23 : Manf. - coke, petroleum products	11	11	11	11	11
24 : Manf. - chemicals and chemical products	45	0	0	0	0
25 : Manf. - rubber and plastic products	93	93	93	0	0
26 : Manf. - other non-metallic mineral products	198	198	99	99	99
27 : Manf. - basic metals	271	271	271	271	271
28 : Manf. - fabricated metal products	1,259	1,079	989	899	899
29 : Manf. - other machinery	1,028	935	841	748	654
30 : Manf. - office machinery and computers	4	4	4	4	4
31 : Manf. - other electrical machinery	57	57	57	57	57
32 : Manf. - communication equipment	9	9	9	9	9
33 : Manf. - medical instruments	74	74	74	74	74
34 : Manf. - motor vehicles, trailers	917	917	917	825	825
35 : Manf. - transport equipment	254	254	254	254	127
36 : Manf. - furniture; manufacturing n.e.c.	155	155	155	155	155
37 : Recycling	1	1	1	1	1
40 : Electricity, gas, steam and hot water supply	1	1	1	1	1
41 : Collection, purification and distribution of water	0	0	0	0	0
45 : Construction	1,791	1,663	1,727	1,791	1,855
50 : Sale and repair of motor vehicles and fuel	1,093	1,038	1,038	1,066	1,066
51 : Wholesale trade	2,397	2,277	2,277	2,337	2,337
52 : Retail trade	5,303	5,216	5,303	5,390	5,390
55 : Hotels and restaurants	2,034	1,946	2,034	2,034	2,122
60 : Land transport	1,317	1,212	1,264	1,370	1,475
61 : Water transport	2	2	2	2	2
62 : Air transport	1	1	1	1	1
63 : Supporting transport activities/travel agencies	728	670	699	757	815
64 : Post and telecommunications	1,862	1,643	1,533	1,424	1,314
65 : Financial intermediation	366	366	366	366	366
66 : Insurance and pension funding	167	167	167	167	167
67 : Auxiliary financial activities	43	43	43	43	43
70 : Real estate activities	286	277	223	259	259
71 : Renting of machinery and equipment	244	236	191	221	221
72 : Computer and related activities	346	346	461	461	461
73 : Research and development	15	15	12	14	14
74 : Other business activities	5,232	5,232	5,396	5,559	5,723
75 : Public administration and defence	1,302	1,202	1,202	1,202	1,202
80 : Education	4,086	4,186	4,285	4,385	4,584
85 : Health and social work	3,409	3,496	3,671	3,846	4,021
90 : Sewage and refuse disposal	78	78	78	82	82
91 : Activities of membership organisations	175	175	175	184	184
92 : Recreational, cultural and sporting activities	816	816	816	859	859
93 : Other service activities	371	371	371	391	391
Total	38,429	37,198	37,455	37,917	38,441

Projected Growth Rates (% pa)

	2007- 2011	2011- 2016	2016- 2021	2021- 2026
01 : Agriculture/Hunting, etc.	0.0%	0.0%	-100.0%	NA
10 : Coal Mining, Peat Extraction	NA	NA	NA	NA
11 : Petroleum, Oil/Gas Services	NA	NA	NA	NA
14 : Other mining and quarry	0.0%	0.0%	0.0%	0.0%
15 : Manf. - food and beverages	0.0%	0.0%	0.0%	0.0%
16 : Manf. - tobacco	NA	NA	NA	NA
17 : Manf. - textiles	-15.9%	-100.0%	NA	NA
18 : Manf. - wearing apparel	-15.9%	-100.0%	NA	NA
19 : Tanning and dressing of leather	NA	NA	NA	NA
20 : Manf. - wood products	0.0%	-12.9%	0.0%	0.0%
21 : Manf. - pulp and paper products	0.0%	-12.9%	0.0%	0.0%
22 : Publishing and Printing	-15.9%	0.0%	0.0%	0.0%
23 : Manf. - coke, petroleum products	0.0%	0.0%	0.0%	0.0%
24 : Manf. - chemicals and chemical products	-100.0%	NA	NA	NA
25 : Manf. - rubber and plastic products	0.0%	0.0%	-100.0%	NA
26 : Manf. - other non-metallic mineral products	0.0%	-12.9%	0.0%	0.0%
27 : Manf. - basic metals	0.0%	0.0%	0.0%	0.0%
28 : Manf. - fabricated metal products	-3.8%	-1.7%	-1.9%	0.0%
29 : Manf. - other machinery	-2.4%	-2.1%	-2.3%	-2.6%
30 : Manf. - office machinery and computers	0.0%	0.0%	0.0%	0.0%
31 : Manf. - other electrical machinery	0.0%	0.0%	0.0%	0.0%
32 : Manf. - communication equipment	0.0%	0.0%	0.0%	0.0%
33 : Manf. - medical instruments	0.0%	0.0%	0.0%	0.0%
34 : Manf. - motor vehicles, trailers	0.0%	0.0%	-2.1%	0.0%
35 : Manf. - transport equipment	0.0%	127	0.0%	-12.9%
36 : Manf. - furniture; manufacturing n.e.c.	0.0%	0.0%	0.0%	0.0%
37 : Recycling	0.0%	0.0%	0.0%	0.0%
40 : Electricity, gas, steam and hot water supply	0.0%	0.0%	0.0%	0.0%
41 : Collection, purification and distribution of water	NA	NA	NA	NA
45 : Construction	-1.8%	0.8%	0.7%	0.7%
50 : Sale and repair of motor vehicles and fuel	-1.3%	0.0%	0.5%	0.0%
51 : Wholesale trade	-1.3%	0.0%	0.5%	0.0%
52 : Retail trade	-0.4%	0.3%	0.3%	0.0%
55 : Hotels and restaurants	-1.1%	0.9%	0.0%	0.9%
60 : Land transport	-2.1%	0.9%	1.6%	1.5%
61 : Water transport	0.0%	0.0%	0.0%	0.0%
62 : Air transport	0.0%	0.0%	0.0%	0.0%
63 : Supporting transport activities/travel agencies	-2.1%	0.9%	1.6%	1.5%
64 : Post and telecommunications	-3.1%	-1.4%	-1.5%	-1.6%
65 : Financial intermediation	0.0%	0.0%	0.0%	0.0%
66 : Insurance and pension funding	0.0%	0.0%	0.0%	0.0%
67 : Auxiliary financial activities	0.0%	0.0%	0.0%	0.0%
70 : Real estate activities	-0.8%	-4.2%	3.0%	0.0%
71 : Renting of machinery and equipment	-0.8%	-4.2%	3.0%	0.0%
72 : Computer and related activities	0.0%	5.9%	0.0%	0.0%
73 : Research and development	-0.8%	-4.2%	3.0%	0.0%
74 : Other business activities	0.0%	0.6%	0.6%	0.6%
75 : Public administration and defence	-2.0%	0.0%	0.0%	0.0%
80 : Education	0.6%	0.5%	0.5%	0.9%
85 : Health and social work	0.6%	1.0%	0.9%	0.9%
90 : Sewage and refuse disposal	0.0%	0.0%	1.0%	0.0%
91 : Activities of membership organisations	0.0%	0.0%	1.0%	0.0%
92 : Recreational, cultural and sporting activities	0.0%	0.0%	1.0%	0.0%
93 : Other service activities	0.0%	0.0%	1.0%	0.0%
Total	-0.8%	0.1%	0.2%	0.3%

Employment Projections - Nuneaton & Bedworth**Baseline Employment Projections - Selected Sectors Only**

	2007	2011	2016	2021	2026
	Actual				
M1 Food & Beverages	164	164	164	164	164
M2 Wood & Wood Products	125	125	63	63	63
M3 Printing & Publishing	126	63	63	63	63
M4 Chemical, Plastic & Non-Metallic Materials/Products	336	291	192	99	99
M5 Basic Metals	271	271	271	271	271
M6 Metal Goods	1,259	1,079	989	899	899
M7 Mechanical Engineering	1,028	935	841	748	654
M8 Electronics, Electrical Engineering & Instruments	144	144	144	144	144
M9 Motor Vehicles & Other Transport Equipment	1,171	1,171	1,171	1,079	952
M10 Manufacturing nes	288	229	169	169	169
S1 Utilities	79	79	79	83	83
S2 Construction	1,791	1,663	1,727	1,791	1,855
S3 Wholesale Distribution	2,397	2,277	2,277	2,337	2,337
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1,093	1,038	1,038	1,066	1,066
S5 Retailing	5,303	5,216	5,303	5,390	5,390
S6 Hotels & Catering	2,034	1,946	2,034	2,034	2,122
S7 Land Transport	2,045	1,881	1,963	2,127	2,290
S8 Communications	1,862	1,643	1,533	1,424	1,314
S9 Insurance, Banking & Finance	576	576	576	576	576
S10 Computing Services	346	346	461	461	461
S11 Real Estate & Professional Services	301	292	235	273	273
S12 Other Business Services	5,232	5,232	5,396	5,559	5,723
S13 Public Administration & Defence	1,302	1,202	1,202	1,202	1,202
S14 Education	4,086	4,186	4,285	4,385	4,584
S15 Health & Social Work	3,409	3,496	3,671	3,846	4,021
S16 Recreational, Cultural & Sporting Activities	816	816	816	859	859
S17 Other Services	790	782	737	796	796
Total	38,374	37,143	37,400	37,906	38,430

Projected Growth Rates (% pa)

	2007-2011	2011-2016	2016-2021	2021-2026
M1 Food & Beverages	0.0%	0.0%	0.0%	0.0%
M2 Wood & Wood Products	0.0%	-12.9%	0.0%	0.0%
M3 Printing & Publishing	-15.9%	0.0%	0.0%	0.0%
M4 Chemical, Plastic & Non-Metallic Materials/Products	-3.5%	-8.0%	-12.4%	0.0%
M5 Basic Metals	0.0%	0.0%	0.0%	0.0%
M6 Metal Goods	-3.8%	-1.7%	-1.9%	0.0%
M7 Mechanical Engineering	-2.4%	-2.1%	-2.3%	-2.6%
M8 Electronics, Electrical Engineering & Instruments	0.0%	0.0%	0.0%	0.0%
M9 Motor Vehicles & Other Transport Equipment	0.0%	0.0%	-1.6%	-2.5%
M10 Manufacturing nes	-5.6%	-6.0%	0.0%	0.0%
S1 Utilities	0.0%	0.0%	1.0%	0.0%
S2 Construction	-1.8%	0.8%	0.7%	0.7%
S3 Wholesale Distribution	-1.3%	0.0%	0.5%	0.0%
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	-1.3%	0.0%	0.5%	0.0%
S5 Retailing	-0.4%	0.3%	0.3%	0.0%
S6 Hotels & Catering	-1.1%	0.9%	0.0%	0.9%
S7 Land Transport	-2.1%	0.9%	1.6%	1.5%
S8 Communications	-3.1%	-1.4%	-1.5%	-1.6%
S9 Insurance, Banking & Finance	0.0%	0.0%	0.0%	0.0%
S10 Computing Services	0.0%	5.9%	0.0%	0.0%
S11 Real Estate & Professional Services	-0.8%	-4.2%	3.0%	0.0%
S12 Other Business Services	0.0%	0.6%	0.6%	0.6%
S13 Public Administration & Defence	-2.0%	0.0%	0.0%	0.0%
S14 Education	0.6%	0.5%	0.5%	0.9%
S15 Health & Social Work	0.6%	1.0%	0.9%	0.9%
S16 Recreational, Cultural & Sporting Activities	0.0%	0.0%	1.0%	0.0%
S17 Other Services	-0.2%	-1.2%	1.6%	0.0%
Total	-0.8%	0.1%	0.3%	0.3%

Employment Projections - Nuneaton & Bedworth

Past Trends Scenario

	2007 Actual	2011	2016	2021	2026
01 : Agriculture/Hunting, etc.	44	41	38	36	33
10 : Coal Mining, Peat Extraction	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	0	0	0
14 : Other mining and quarry	8	5	2	1	1
15 : Manf.- food and beverages	164	173	186	200	214
16 : Manf. - tobacco	0	0	0	0	0
17 : Manf. - textiles	91	79	66	56	47
18 : Manf. - wearing apparel	27	20	13	9	6
19 : Tanning and dressing of leather	0	0	0	0	0
20 : Manf. - wood products	125	134	147	160	175
21 : Manf. - pulp and paper products	3	1	0	0	0
22 : Publishing and Printing	126	116	104	94	84
23 : Manf. - coke, petroleum products	11	12	13	15	17
24 : Manf. - chemicals and chemical products	45	37	29	23	18
25 : Manf. - rubber and plastic products	93	79	64	52	42
26 : Manf. - other non-metallic mineral products	198	191	184	176	169
27 : Manf. basic metals	271	252	230	209	191
28 : Manf. - fabricated metal products	1,259	1,131	989	864	756
29 : Manf. - other machinery	1,028	1,034	1,042	1,050	1,058
30 : Manf. - office machinery and computers	4	4	4	4	4
31 : Manf. - other electrical machinery	57	50	42	35	30
32 : Manf. - communication equipment	9	8	7	6	5
33 : Manf. - medical instruments	74	70	66	62	58
34 : Manf. - motor vehicles, trailers	917	881	838	797	758
35 : Manf. - transport equipment	254	239	222	206	191
36 : Manf. - furniture; manufacturing n.e.c.	155	143	130	118	106
37 : Recycling	1	1	1	1	1
40 : Electricity, gas, steam and hot water supply	1	1	1	1	1
41 : Collection, purification and distribution of water	0	0	0	0	0
45 : Construction	1,791	1,777	1,761	1,744	1,727
50 : Sale and repair of motor vehicles and fuel	1,093	1,123	1,161	1,201	1,242
51 : Wholesale trade	2,397	2,460	2,541	2,624	2,711
52 : Retail trade	5,303	5,393	5,509	5,627	5,747
55 : Hotels and restaurants	2,034	2,010	1,981	1,952	1,924
60 : Land transport	1,317	1,346	1,384	1,422	1,462
61 : Water transport	2	2	2	2	2
62 : Air transport	1	1	1	1	1
63 : Supporting transport activities/travel agencies	728	775	838	906	979
64 : Post and telecommunications	1,862	1,923	2,002	2,085	2,171
65 : Financial intermediation	366	354	340	326	313
66 : Insurance and pension funding	167	153	138	124	111
67 : Auxiliary financial activities	43	39	35	32	29
70 : Real estate activities	286	304	327	353	380
71 : Renting of machinery and equipment	244	251	259	268	276
72 : Computer and related activities	346	357	371	386	401
73 : Research and development	15	33	86	227	601
74 : Other business activities	5,232	5,497	5,847	6,219	6,615
75 : Public administration and defence	1,302	1,294	1,284	1,274	1,265
80 : Education	4,086	4,245	4,452	4,670	4,898
85 : Health and social work	3,409	3,661	4,003	4,376	4,784
90 : Sewage and refuse disposal	78	81	85	89	93
91 : Activities of membership organisations	175	169	163	156	150
92 : Recreational, cultural and sporting activities	816	847	888	931	976
93 : Other service activities	371	390	416	444	473
Total	38,429	39,190	40,293	41,614	43,297

Projected Growth Rates (% pa)

	2007- 2011	2011- 2016	2016- 2021	2021- 2026
01 : Agriculture/Hunting, etc.	-1.5%	-1.5%	-1.5%	-1.5%
10 : Coal Mining, Peat Extraction	NA	NA	NA	NA
11 : Petroleum, Oil/Gas Services	NA	NA	NA	NA
14 : Other mining and quarry	-12.3%	-12.3%	-12.3%	-12.3%
15 : Manf.- food and beverages	1.4%	1.4%	1.4%	1.4%
16 : Manf. - tobacco	NA	NA	NA	NA
17 : Manf. - textiles	-3.4%	-3.4%	-3.4%	-3.4%
18 : Manf. - wearing apparel	-7.5%	-7.5%	-7.5%	-7.5%
19 : Tanning and dressing of leather	NA	NA	NA	NA
20 : Manf. - wood products	1.8%	1.8%	1.8%	1.8%
21 : Manf. - pulp and paper products	-23.6%	-23.6%	-23.6%	-23.6%
22 : Publishing and Printing	-2.1%	-2.1%	-2.1%	-2.1%
23 : Manf. - coke, petroleum products	2.3%	2.3%	2.3%	2.3%
24 : Manf. - chemicals and chemical products	-4.6%	-4.6%	-4.6%	-4.6%
25 : Manf. - rubber and plastic products	-4.1%	-4.1%	-4.1%	-4.1%
26 : Manf. - other non-metallic mineral products	-0.8%	-0.8%	-0.8%	-0.8%
27 : Manf. basic metals	-1.8%	-1.8%	-1.8%	-1.8%
28 : Manf. - fabricated metal products	-2.7%	-2.7%	-2.7%	-2.7%
29 : Manf. - other machinery	0.2%	0.2%	0.2%	0.2%
30 : Manf. - office machinery and computers	0.0%	0.0%	0.0%	0.0%
31 : Manf. - other electrical machinery	-3.4%	-3.4%	-3.4%	-3.4%
32 : Manf. - communication equipment	-3.1%	-3.1%	-3.1%	-3.1%
33 : Manf. - medical instruments	-1.3%	-1.3%	-1.3%	-1.3%
34 : Manf. - motor vehicles, trailers	-1.0%	-1.0%	-1.0%	-1.0%
35 : Manf. - transport equipment	-1.5%	-1.5%	-1.5%	-1.5%
36 : Manf. - furniture; manufacturing n.e.c.	-2.0%	-2.0%	-2.0%	-2.0%
37 : Recycling	0.0%	0.0%	0.0%	0.0%
40 : Electricity, gas, steam and hot water supply	0.0%	0.0%	0.0%	0.0%
41 : Collection, purification and distribution of water	NA	NA	NA	NA
45 : Construction	-0.2%	-0.2%	-0.2%	-0.2%
50 : Sale and repair of motor vehicles and fuel	0.7%	0.7%	0.7%	0.7%
51 : Wholesale trade	0.6%	0.6%	0.6%	0.6%
52 : Retail trade	0.4%	0.4%	0.4%	0.4%
55 : Hotels and restaurants	-0.3%	-0.3%	-0.3%	-0.3%
60 : Land transport	0.6%	0.6%	0.6%	0.6%
61 : Water transport	0.0%	0.0%	0.0%	0.0%
62 : Air transport	0.0%	0.0%	0.0%	0.0%
63 : Supporting transport activities/travel agencies	1.6%	1.6%	1.6%	1.6%
64 : Post and telecommunications	0.8%	0.8%	0.8%	0.8%
65 : Financial intermediation	-0.8%	-0.8%	-0.8%	-0.8%
66 : Insurance and pension funding	-2.1%	-2.1%	-2.1%	-2.1%
67 : Auxiliary financial activities	-2.1%	-2.1%	-2.1%	-2.1%
70 : Real estate activities	1.5%	1.5%	1.5%	1.5%
71 : Renting of machinery and equipment	0.7%	0.7%	0.7%	0.7%
72 : Computer and related activities	0.8%	0.8%	0.8%	0.8%
73 : Research and development	21.4%	21.4%	21.4%	21.4%
74 : Other business activities	1.2%	1.2%	1.2%	1.2%
75 : Public administration and defence	-0.2%	-0.2%	-0.2%	-0.2%
80 : Education	1.0%	1.0%	1.0%	1.0%
85 : Health and social work	1.8%	1.8%	1.8%	1.8%
90 : Sewage and refuse disposal	0.9%	0.9%	0.9%	0.9%
91 : Activities of membership organisations	-0.8%	-0.8%	-0.8%	-0.8%
92 : Recreational, cultural and sporting activities	0.9%	0.9%	0.9%	0.9%
93 : Other service activities	1.3%	1.3%	1.3%	1.3%
Total	0.5%	0.6%	0.6%	0.8%

**Employment Projections - Nuneaton & Bedworth
Past Trends Scenario - Selected Sectors Only**

	2007 Actual	2011	2016	2021	2026
M1 Food & Beverages	164	173	186	200	214
M2 Wood & Wood Products	125	134	147	160	175
M3 Printing & Publishing	126	116	104	94	84
M4 Chemical, Plastic & Non-Metallic Materials/Products	336	307	277	251	229
M5 Basic Metals	271	252	230	209	191
M6 Metal Goods	1,259	1,131	989	864	756
M7 Mechanical Engineering	1,028	1,034	1,042	1,050	1,058
M8 Electronics, Electrical Engineering & Instruments	144	132	119	107	97
M9 Motor Vehicles & Other Transport Equipment	1,171	1,120	1,060	1,003	949
M10 Manufacturing nes	288	256	224	199	177
S1 Utilities	79	82	86	90	94
S2 Construction	1,791	1,777	1,761	1,744	1,727
S3 Wholesale Distribution	2,397	2,460	2,541	2,624	2,711
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1,093	1,123	1,161	1,201	1,242
S5 Retailing	5,303	5,393	5,509	5,627	5,747
S6 Hotels & Catering	2,034	2,010	1,981	1,952	1,924
S7 Land Transport	2,045	2,121	2,222	2,328	2,441
S8 Communications	1,862	1,923	2,002	2,085	2,171
S9 Insurance, Banking & Finance	576	547	513	482	453
S10 Computing Services	346	357	371	386	401
S11 Real Estate & Professional Services	301	336	413	580	980
S12 Other Business Services	5,232	5,497	5,847	6,219	6,615
S13 Public Administration & Defence	1,302	1,294	1,284	1,274	1,265
S14 Education	4,086	4,245	4,452	4,670	4,898
S15 Health & Social Work	3,409	3,661	4,003	4,376	4,784
S16 92 : Recreational, cultural and sporting activities	816	847	888	931	976
S17 Other Services	790	810	838	867	899
Total	38,374	39,141	40,249	41,574	43,260

Projected Growth Rates (% pa)

	2007- 2011	2011- 2016	2016- 2021	2021- 2026
M1 Food & Beverages	1.4%	1.4%	1.4%	1.4%
M2 Wood & Wood Products	1.8%	1.8%	1.8%	1.8%
M3 Printing & Publishing	-2.1%	-2.1%	-2.1%	-2.1%
M4 Chemical, Plastic & Non-Metallic Materials/Products	-2.2%	-2.1%	-1.9%	-1.8%
M5 Basic Metals	-1.8%	-1.8%	-1.8%	-1.8%
M6 Metal Goods	-2.7%	-2.7%	-2.7%	-2.7%
M7 Mechanical Engineering	0.2%	0.2%	0.2%	0.2%
M8 Electronics, Electrical Engineering & Instruments	-2.2%	-2.1%	-2.0%	-2.0%
M9 Motor Vehicles & Other Transport Equipment	-1.1%	-1.1%	-1.1%	-1.1%
M10 Manufacturing nes	-2.9%	-2.6%	-2.4%	-2.2%
S1 Utilities	0.9%	0.9%	0.9%	0.9%
S2 Construction	-0.2%	-0.2%	-0.2%	-0.2%
S3 Wholesale Distribution	0.6%	0.6%	0.6%	0.6%
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	0.7%	0.7%	0.7%	0.7%
S5 Retailing	0.4%	0.4%	0.4%	0.4%
S6 Hotels & Catering	-0.3%	-0.3%	-0.3%	-0.3%
S7 Land Transport	0.9%	0.9%	0.9%	1.0%
S8 Communications	0.8%	0.8%	0.8%	0.8%
S9 Insurance, Banking & Finance	-1.3%	-1.3%	-1.2%	-1.2%
S10 Computing Services	0.8%	0.8%	0.8%	0.8%
S11 Real Estate & Professional Services	2.8%	4.2%	7.0%	11.1%
S12 Other Business Services	1.2%	1.2%	1.2%	1.2%
S13 Public Administration & Defence	-0.2%	-0.2%	-0.2%	-0.2%
S14 Education	1.0%	1.0%	1.0%	1.0%
S15 Health & Social Work	1.8%	1.8%	1.8%	1.8%
S16 92 : Recreational, cultural and sporting activities	0.9%	0.9%	0.9%	0.9%
S17 Other Services	0.6%	0.7%	0.7%	0.7%
Total	0.5%	0.6%	0.6%	0.8%

**Employment Projections - Nuneaton & Bedworth
Scenario A-1 (11,000 New Dwellings)**

	2007 Actual	2011	2016	2021	2026
01 : Agriculture/Hunting, etc.	44	13	3	1	0
10 : Coal Mining, Peat Extraction	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	0	0	0
14 : Other mining and quarry	8	8	8	8	8
15 : Manf. - food and beverages	164	164	164	164	165
16 : Manf. - tobacco	0	0	0	0	0
17 : Manf. - textiles	91	27	6	1	0
18 : Manf. - wearing apparel	27	8	2	0	0
19 : Tanning and dressing of leather	0	0	0	0	0
20 : Manf. - wood products	125	108	90	75	63
21 : Manf. - pulp and paper products	3	3	2	2	2
22 : Publishing and Printing	126	109	91	76	63
23 : Manf. - coke, petroleum products	11	11	11	11	11
24 : Manf. - chemicals and chemical products	45	13	3	1	0
25 : Manf. - rubber and plastic products	93	27	6	1	0
26 : Manf. - other non-metallic mineral products	198	171	143	119	100
27 : Manf. - basic metals	271	271	271	272	272
28 : Manf. - fabricated metal products	1,259	1,174	1,076	986	903
29 : Manf. - other machinery	1,028	1,054	1,086	1,120	1,155
30 : Manf. - office machinery and computers	4	4	4	4	4
31 : Manf. - other electrical machinery	57	57	57	57	57
32 : Manf. - communication equipment	9	9	9	9	9
33 : Manf. - medical instruments	74	74	74	74	74
34 : Manf. - motor vehicles, trailers	917	918	918	919	920
35 : Manf. - transport equipment	254	254	254	255	255
36 : Manf. - furniture; manufacturing n.e.c.	155	155	155	155	155
37 : Recycling	1	1	1	1	1
40 : Electricity, gas, steam and hot water supply	1	1	1	1	1
41 : Collection, purification and distribution of water	0	0	0	0	0
45 : Construction	1,791	1,892	2,026	2,170	2,324
50 : Sale and repair of motor vehicles and fuel	1,093	1,137	1,194	1,253	1,316
51 : Wholesale trade	2,397	2,399	2,400	2,402	2,404
52 : Retail trade	5,303	5,542	5,857	6,189	6,540
55 : Hotels and restaurants	2,034	2,152	2,308	2,476	2,656
60 : Land transport	1,317	1,350	1,391	1,435	1,479
61 : Water transport	2	2	2	2	2
62 : Air transport	1	1	1	1	1
63 : Supporting transport activities/travel agencies	728	746	769	793	818
64 : Post and telecommunications	1,862	1,863	1,865	1,866	1,868
65 : Financial intermediation	366	366	367	367	367
66 : Insurance and pension funding	167	167	167	167	168
67 : Auxiliary financial activities	43	43	43	43	43
70 : Real estate activities	286	315	355	401	452
71 : Renting of machinery and equipment	244	239	233	227	222
72 : Computer and related activities	346	368	397	428	462
73 : Research and development	15	33	86	227	601
74 : Other business activities	5,232	5,500	5,854	6,230	6,631
75 : Public administration and defence	1,302	1,422	1,587	1,771	1,977
80 : Education	4,086	4,306	4,598	4,910	5,243
85 : Health and social work	3,409	3,654	3,985	4,346	4,739
90 : Sewage and refuse disposal	78	79	80	81	82
91 : Activities of membership organisations	175	197	229	265	308
92 : Recreational, cultural and sporting activities	816	879	964	1,057	1,159
93 : Other service activities	371	396	429	465	504
Total	38,429	39,680	41,623	43,888	46,586

Projected Growth Rates (% pa)

	2007- 2011	2011- 2016	2016- 2021	2021- 2026
01 : Agriculture/Hunting, etc.	-26.3%	-26.3%	-26.3%	-26.3%
10 : Coal Mining, Peat Extraction	NA	NA	NA	NA
11 : Petroleum, Oil/Gas Services	NA	NA	NA	NA
14 : Other mining and quarry	0.0%	0.0%	0.0%	0.0%
15 : Manf. - food and beverages	0.0%	0.0%	0.0%	0.0%
16 : Manf. - tobacco	NA	NA	NA	NA
17 : Manf. - textiles	-26.3%	-26.3%	-26.3%	-26.3%
18 : Manf. - wearing apparel	-26.3%	-26.3%	-26.3%	-26.3%
19 : Tanning and dressing of leather	NA	NA	NA	NA
20 : Manf. - wood products	-3.6%	-3.6%	-3.6%	-3.6%
21 : Manf. - pulp and paper products	-3.6%	-3.6%	-3.6%	-3.6%
22 : Publishing and Printing	-3.6%	-3.6%	-3.6%	-3.6%
23 : Manf. - coke, petroleum products	0.0%	0.0%	0.0%	0.0%
24 : Manf. - chemicals and chemical products	-26.3%	-26.3%	-26.3%	-26.3%
25 : Manf. - rubber and plastic products	-26.3%	-26.3%	-26.3%	-26.3%
26 : Manf. - other non-metallic mineral products	-3.6%	-3.6%	-3.6%	-3.6%
27 : Manf. - basic metals	0.0%	0.0%	0.0%	0.0%
28 : Manf. - fabricated metal products	-1.7%	-1.7%	-1.7%	-1.7%
29 : Manf. - other machinery	0.6%	0.6%	0.6%	0.6%
30 : Manf. - office machinery and computers	0.0%	0.0%	0.0%	0.0%
31 : Manf. - other electrical machinery	0.0%	0.0%	0.0%	0.0%
32 : Manf. - communication equipment	0.0%	0.0%	0.0%	0.0%
33 : Manf. - medical instruments	0.0%	0.0%	0.0%	0.0%
34 : Manf. - motor vehicles, trailers	0.0%	0.0%	0.0%	0.0%
35 : Manf. - transport equipment	0.0%	0.0%	0.0%	0.0%
36 : Manf. - furniture; manufacturing n.e.c.	0.0%	0.0%	0.0%	0.0%
37 : Recycling	0.0%	0.0%	0.0%	0.0%
40 : Electricity, gas, steam and hot water supply	0.0%	0.0%	0.0%	0.0%
41 : Collection, purification and distribution of water	NA	NA	NA	NA
45 : Construction	1.4%	1.4%	1.4%	1.4%
50 : Sale and repair of motor vehicles and fuel	1.0%	1.0%	1.0%	1.0%
51 : Wholesale trade	0.0%	0.0%	0.0%	0.0%
52 : Retail trade	1.1%	1.1%	1.1%	1.1%
55 : Hotels and restaurants	1.4%	1.4%	1.4%	1.4%
60 : Land transport	0.6%	0.6%	0.6%	0.6%
61 : Water transport	0.0%	0.0%	0.0%	0.0%
62 : Air transport	0.0%	0.0%	0.0%	0.0%
63 : Supporting transport activities/travel agencies	0.6%	0.6%	0.6%	0.6%
64 : Post and telecommunications	0.0%	0.0%	0.0%	0.0%
65 : Financial intermediation	0.0%	0.0%	0.0%	0.0%
66 : Insurance and pension funding	0.0%	0.0%	0.0%	0.0%
67 : Auxiliary financial activities	0.0%	0.0%	0.0%	0.0%
70 : Real estate activities	2.4%	2.4%	2.4%	2.4%
71 : Renting of machinery and equipment	-0.5%	-0.5%	-0.5%	-0.5%
72 : Computer and related activities	1.5%	1.5%	1.5%	1.5%
73 : Research and development	21.4%	21.4%	21.4%	21.4%
74 : Other business activities	1.3%	1.3%	1.3%	1.3%
75 : Public administration and defence	2.2%	2.2%	2.2%	2.2%
80 : Education	1.3%	1.3%	1.3%	1.3%
85 : Health and social work	1.7%	1.7%	1.7%	1.7%
90 : Sewage and refuse disposal	0.3%	0.3%	0.3%	0.3%
91 : Activities of membership organisations	3.0%	3.0%	3.0%	3.0%
92 : Recreational, cultural and sporting activities	1.9%	1.9%	1.9%	1.9%
93 : Other service activities	1.6%	1.6%	1.6%	1.6%
Total	0.8%	1.0%	1.1%	1.2%

**Employment Projections - Nuneaton & Bedworth
Scenario A-1 (11,000 New Dwellings) - Selected Sectors Only**

	2007	2011	2016	2021	2026
	Actual				
M1 Food & Beverages	164	164	164	164	165
M2 Wood & Wood Products	125	108	90	75	63
M3 Printing & Publishing	126	109	91	76	63
M4 Chemical, Plastic & Non-Metallic Materials/Products	336	212	152	121	100
M5 Basic Metals	271	271	271	272	272
M6 Metal Goods	1,259	1,174	1,076	986	903
M7 Mechanical Engineering	1,028	1,054	1,086	1,120	1,155
M8 Electronics, Electrical Engineering & Instruments	144	144	144	144	144
M9 Motor Vehicles & Other Transport Equipment	1,171	1,172	1,173	1,174	1,175
M10 Manufacturing nes	288	205	177	171	169
S1 Utilities	79	80	81	82	83
S2 Construction	1,791	1,892	2,026	2,170	2,324
S3 Wholesale Distribution	2,397	2,399	2,400	2,402	2,404
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1,093	1,137	1,194	1,253	1,316
S5 Retailing	5,303	5,542	5,857	6,189	6,540
S6 Hotels & Catering	2,034	2,152	2,308	2,476	2,656
S7 Land Transport	2,045	2,096	2,161	2,228	2,297
S8 Communications	1,862	1,863	1,865	1,866	1,868
S9 Insurance, Banking & Finance	576	576	577	577	578
S10 Computing Services	346	368	397	428	462
S11 Real Estate & Professional Services	301	348	441	628	1,053
S12 Other Business Services	5,232	5,500	5,854	6,230	6,631
S13 Public Administration & Defence	1,302	1,422	1,587	1,771	1,977
S14 Education	4,086	4,306	4,598	4,910	5,243
S15 Health & Social Work	3,409	3,654	3,985	4,346	4,739
S16 Recreational, cultural and sporting activities	816	879	964	1,057	1,159
S17 Other Services	790	832	891	958	1,034
Total	38,374	39,656	41,610	43,876	46,575

Projected Growth Rates (% pa)

	2007- 2011	2011- 2016	2016- 2021	2021- 2026
M1 Food & Beverages	0.0%	0.0%	0.0%	0.0%
M2 Wood & Wood Products	-3.6%	-3.6%	-3.6%	-3.6%
M3 Printing & Publishing	-3.6%	-3.6%	-3.6%	-3.6%
M4 Chemical, Plastic & Non-Metallic Materials/Products	-10.9%	-6.5%	-4.4%	-3.8%
M5 Basic Metals	0.0%	0.0%	0.0%	0.0%
M6 Metal Goods	-1.7%	-1.7%	-1.7%	-1.7%
M7 Mechanical Engineering	0.6%	0.6%	0.6%	0.6%
M8 Electronics, Electrical Engineering & Instruments	0.0%	0.0%	0.0%	0.0%
M9 Motor Vehicles & Other Transport Equipment	0.0%	0.0%	0.0%	0.0%
M10 Manufacturing nes	-8.2%	-2.9%	-0.7%	-0.2%
S1 Utilities	0.3%	0.3%	0.3%	0.3%
S2 Construction	1.4%	1.4%	1.4%	1.4%
S3 Wholesale Distribution	0.0%	0.0%	0.0%	0.0%
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1.0%	1.0%	1.0%	1.0%
S5 Retailing	1.1%	1.1%	1.1%	1.1%
S6 Hotels & Catering	1.4%	1.4%	1.4%	1.4%
S7 Land Transport	0.6%	0.6%	0.6%	0.6%
S8 Communications	0.0%	0.0%	0.0%	0.0%
S9 Insurance, Banking & Finance	0.0%	0.0%	0.0%	0.0%
S10 Computing Services	1.5%	1.5%	1.5%	1.5%
S11 Real Estate & Professional Services	3.7%	4.9%	7.3%	10.9%
S12 Other Business Services	1.3%	1.3%	1.3%	1.3%
S13 Public Administration & Defence	2.2%	2.2%	2.2%	2.2%
S14 Education	1.3%	1.3%	1.3%	1.3%
S15 Health & Social Work	1.7%	1.7%	1.7%	1.7%
S16 Recreational, cultural and sporting activities	1.9%	1.9%	1.9%	1.9%
S17 Other Services	1.3%	1.4%	1.5%	1.5%
Total	0.8%	1.0%	1.1%	1.2%

**Employment Projections - Nuneaton & Bedworth
Scenario A-2 (14,500 New Dwellings)**

	2007 Actual	2011	2016	2021	2026
01 : Agriculture/Hunting, etc.	44	19	7	2	1
10 : Coal Mining, Peat Extraction	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	0	0	0
14 : Other mining and quarry	8	8	8	8	8
15 : Manf. - food and beverages	164	165	165	166	167
16 : Manf. - tobacco	0	0	0	0	0
17 : Manf. - textiles	91	39	14	5	2
18 : Manf. - wearing apparel	27	12	4	1	1
19 : Tanning and dressing of leather	0	0	0	0	0
20 : Manf. - wood products	125	109	92	77	65
21 : Manf. - pulp and paper products	3	3	2	2	2
22 : Publishing and Printing	126	110	92	78	65
23 : Manf. - coke, petroleum products	11	11	11	11	11
24 : Manf. - chemicals and chemical products	45	19	7	2	1
25 : Manf. - rubber and plastic products	93	40	14	5	2
26 : Manf. - other non-metallic mineral products	198	172	145	122	103
27 : Manf. - basic metals	271	272	273	275	276
28 : Manf. - fabricated metal products	1,259	1,179	1,087	1,002	923
29 : Manf. - other machinery	1,028	1,057	1,094	1,132	1,171
30 : Manf. - office machinery and computers	4	4	4	4	4
31 : Manf. - other electrical machinery	57	57	58	58	58
32 : Manf. - communication equipment	9	9	9	9	9
33 : Manf. - medical instruments	74	74	75	75	75
34 : Manf. - motor vehicles, trailers	917	921	925	930	934
35 : Manf. - transport equipment	254	255	256	258	259
36 : Manf. - furniture; manufacturing n.e.c.	155	156	156	157	158
37 : Recycling	1	1	1	1	1
40 : Electricity, gas, steam and hot water supply	1	1	1	1	1
41 : Collection, purification and distribution of water	0	0	0	0	0
45 : Construction	1,791	1,925	2,106	2,304	2,521
50 : Sale and repair of motor vehicles and fuel	1,093	1,152	1,230	1,314	1,404
51 : Wholesale trade	2,397	2,406	2,418	2,430	2,442
52 : Retail trade	5,303	5,624	6,053	6,515	7,012
55 : Hotels and restaurants	2,034	2,189	2,400	2,631	2,884
60 : Land transport	1,317	1,354	1,401	1,449	1,500
61 : Water transport	2	2	2	2	2
62 : Air transport	1	1	1	1	1
63 : Supporting transport activities/travel agencies	728	748	774	801	829
64 : Post and telecommunications	1,862	1,869	1,879	1,888	1,897
65 : Financial intermediation	366	367	369	371	373
66 : Insurance and pension funding	167	168	168	169	170
67 : Auxiliary financial activities	43	43	43	44	44
70 : Real estate activities	286	323	376	437	509
71 : Renting of machinery and equipment	244	240	235	230	226
72 : Computer and related activities	346	369	399	432	468
73 : Research and development	15	33	86	228	601
74 : Other business activities	5,232	5,514	5,888	6,287	6,714
75 : Public administration and defence	1,302	1,456	1,673	1,923	2,211
80 : Education	4,086	4,378	4,772	5,202	5,671
85 : Health and social work	3,409	3,728	4,169	4,662	5,213
90 : Sewage and refuse disposal	78	79	81	82	84
91 : Activities of membership organisations	175	203	244	293	352
92 : Recreational, cultural and sporting activities	816	897	1,010	1,138	1,281
93 : Other service activities	371	403	448	497	552
Total	38,429	40,164	42,726	45,712	49,256

Projected Growth Rates (% pa)

	2007- 2011	2011- 2016	2016- 2021	2021- 2026
01 : Agriculture/Hunting, etc.	-18.9%	-18.9%	-18.9%	-18.9%
10 : Coal Mining, Peat Extraction	NA	NA	NA	NA
11 : Petroleum, Oil/Gas Services	NA	NA	NA	NA
14 : Other mining and quarry	0.1%	0.1%	0.1%	0.1%
15 : Manf. - food and beverages	0.1%	0.1%	0.1%	0.1%
16 : Manf. - tobacco	NA	NA	NA	NA
17 : Manf. - textiles	-18.9%	-18.9%	-18.9%	-18.9%
18 : Manf. - wearing apparel	-18.9%	-18.9%	-18.9%	-18.9%
19 : Tanning and dressing of leather	NA	NA	NA	NA
20 : Manf. - wood products	-3.4%	-3.4%	-3.4%	-3.4%
21 : Manf. - pulp and paper products	-3.4%	-3.4%	-3.4%	-3.4%
22 : Publishing and Printing	-3.4%	-3.4%	-3.4%	-3.4%
23 : Manf. - coke, petroleum products	0.1%	0.1%	0.1%	0.1%
24 : Manf. - chemicals and chemical products	-18.9%	-18.9%	-18.9%	-18.9%
25 : Manf. - rubber and plastic products	-18.9%	-18.9%	-18.9%	-18.9%
26 : Manf. - other non-metallic mineral products	-3.4%	-3.4%	-3.4%	-3.4%
27 : Manf. - basic metals	0.1%	0.1%	0.1%	0.1%
28 : Manf. - fabricated metal products	-1.6%	-1.6%	-1.6%	-1.6%
29 : Manf. - other machinery	0.7%	0.7%	0.7%	0.7%
30 : Manf. - office machinery and computers	0.1%	0.1%	0.1%	0.1%
31 : Manf. - other electrical machinery	0.1%	0.1%	0.1%	0.1%
32 : Manf. - communication equipment	0.1%	0.1%	0.1%	0.1%
33 : Manf. - medical instruments	0.1%	0.1%	0.1%	0.1%
34 : Manf. - motor vehicles, trailers	0.1%	0.1%	0.1%	0.1%
35 : Manf. - transport equipment	0.1%	0.1%	0.1%	0.1%
36 : Manf. - furniture; manufacturing n.e.c.	0.1%	0.1%	0.1%	0.1%
37 : Recycling	0.1%	0.1%	0.1%	0.1%
40 : Electricity, gas, steam and hot water supply	0.1%	0.1%	0.1%	0.1%
41 : Collection, purification and distribution of water	NA	NA	NA	NA
45 : Construction	1.8%	1.8%	1.8%	1.8%
50 : Sale and repair of motor vehicles and fuel	1.3%	1.3%	1.3%	1.3%
51 : Wholesale trade	0.1%	0.1%	0.1%	0.1%
52 : Retail trade	1.5%	1.5%	1.5%	1.5%
55 : Hotels and restaurants	1.9%	1.9%	1.9%	1.9%
60 : Land transport	0.7%	0.7%	0.7%	0.7%
61 : Water transport	0.1%	0.1%	0.1%	0.1%
62 : Air transport	0.1%	0.1%	0.1%	0.1%
63 : Supporting transport activities/travel agencies	0.7%	0.7%	0.7%	0.7%
64 : Post and telecommunications	0.1%	0.1%	0.1%	0.1%
65 : Financial intermediation	0.1%	0.1%	0.1%	0.1%
66 : Insurance and pension funding	0.1%	0.1%	0.1%	0.1%
67 : Auxiliary financial activities	0.1%	0.1%	0.1%	0.1%
70 : Real estate activities	3.1%	3.1%	3.1%	3.1%
71 : Renting of machinery and equipment	-0.4%	-0.4%	-0.4%	-0.4%
72 : Computer and related activities	1.6%	1.6%	1.6%	1.6%
73 : Research and development	21.4%	21.4%	21.4%	21.4%
74 : Other business activities	1.3%	1.3%	1.3%	1.3%
75 : Public administration and defence	2.8%	2.8%	2.8%	2.8%
80 : Education	1.7%	1.7%	1.7%	1.7%
85 : Health and social work	2.3%	2.3%	2.3%	2.3%
90 : Sewage and refuse disposal	0.4%	0.4%	0.4%	0.4%
91 : Activities of membership organisations	3.8%	3.8%	3.8%	3.8%
92 : Recreational, cultural and sporting activities	2.4%	2.4%	2.4%	2.4%
93 : Other service activities	2.1%	2.1%	2.1%	2.1%
Total	1.1%	1.2%	1.4%	1.5%

Employment Projections - Nuneaton & Bedworth**Scenario A-2 (14,500 New Dwellings) - Selected Sectors Only**

	2007	2011	2016	2021	2026
	Actual				
M1 Food & Beverages	164	165	165	166	167
M2 Wood & Wood Products	125	109	92	77	65
M3 Printing & Publishing	126	110	92	78	65
M4 Chemical, Plastic & Non-Metallic Materials/Products	336	232	166	129	105
M5 Basic Metals	271	272	273	275	276
M6 Metal Goods	1,259	1,179	1,087	1,002	923
M7 Mechanical Engineering	1,028	1,057	1,094	1,132	1,171
M8 Electronics, Electrical Engineering & Instruments	144	145	145	146	147
M9 Motor Vehicles & Other Transport Equipment	1,171	1,176	1,181	1,187	1,193
M10 Manufacturing nes	288	221	189	177	174
S1 Utilities	79	80	82	83	85
S2 Construction	1,791	1,925	2,106	2,304	2,521
S3 Wholesale Distribution	2,397	2,406	2,418	2,430	2,442
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1,093	1,152	1,230	1,314	1,404
S5 Retailing	5,303	5,624	6,053	6,515	7,012
S6 Hotels & Catering	2,034	2,189	2,400	2,631	2,884
S7 Land Transport	2,045	2,102	2,175	2,251	2,329
S8 Communications	1,862	1,869	1,879	1,888	1,897
S9 Insurance, Banking & Finance	576	578	581	584	587
S10 Computing Services	346	369	399	432	468
S11 Real Estate & Professional Services	301	356	462	665	1,110
S12 Other Business Services	5,232	5,514	5,888	6,287	6,714
S13 Public Administration & Defence	1,302	1,456	1,673	1,923	2,211
S14 Education	4,086	4,378	4,772	5,202	5,671
S15 Health & Social Work	3,409	3,728	4,169	4,662	5,213
S16 Recreational, cultural and sporting activities	816	897	1,010	1,138	1,281
S17 Other Services	790	846	927	1,021	1,130
Total	38,374	40,134	42,709	45,699	49,244

Projected Growth Rates (% pa)

	2007-2011	2011-2016	2016-2021	2021-2026
M1 Food & Beverages	0.1%	0.1%	0.1%	0.1%
M2 Wood & Wood Products	-3.4%	-3.4%	-3.4%	-3.4%
M3 Printing & Publishing	-3.4%	-3.4%	-3.4%	-3.4%
M4 Chemical, Plastic & Non-Metallic Materials/Products	-8.8%	-6.5%	-4.9%	-4.0%
M5 Basic Metals	0.1%	0.1%	0.1%	0.1%
M6 Metal Goods	-1.6%	-1.6%	-1.6%	-1.6%
M7 Mechanical Engineering	0.7%	0.7%	0.7%	0.7%
M8 Electronics, Electrical Engineering & Instruments	0.1%	0.1%	0.1%	0.1%
M9 Motor Vehicles & Other Transport Equipment	0.1%	0.1%	0.1%	0.1%
M10 Manufacturing nes	-6.4%	-3.2%	-1.2%	-0.4%
S1 Utilities	0.4%	0.4%	0.4%	0.4%
S2 Construction	1.8%	1.8%	1.8%	1.8%
S3 Wholesale Distribution	0.1%	0.1%	0.1%	0.1%
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1.3%	1.3%	1.3%	1.3%
S5 Retailing	1.5%	1.5%	1.5%	1.5%
S6 Hotels & Catering	1.9%	1.9%	1.9%	1.9%
S7 Land Transport	0.7%	0.7%	0.7%	0.7%
S8 Communications	0.1%	0.1%	0.1%	0.1%
S9 Insurance, Banking & Finance	0.1%	0.1%	0.1%	0.1%
S10 Computing Services	1.6%	1.6%	1.6%	1.6%
S11 Real Estate & Professional Services	4.2%	5.4%	7.6%	10.8%
S12 Other Business Services	1.3%	1.3%	1.3%	1.3%
S13 Public Administration & Defence	2.8%	2.8%	2.8%	2.8%
S14 Education	1.7%	1.7%	1.7%	1.7%
S15 Health & Social Work	2.3%	2.3%	2.3%	2.3%
S16 Recreational, cultural and sporting activities	2.4%	2.4%	2.4%	2.4%
S17 Other Services	1.7%	1.8%	1.9%	2.1%
Total	1.1%	1.3%	1.4%	1.5%

Employment Projections - Nuneaton & Bedworth

Reduced Out-Commuting Scenario (11,000 New Dwellings)

	2007	2011	2016	2021	2026
	Actual				
01 : Agriculture/Hunting, etc.	44	37	30	24	19
10 : Coal Mining, Peat Extraction	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	0	0	0
14 : Other mining and quarry	8	9	9	10	11
15 : Manf. - food and beverages	164	177	195	214	236
16 : Manf. - tobacco	0	0	0	0	0
17 : Manf. - textiles	91	76	61	49	40
18 : Manf. - wearing apparel	27	23	18	15	12
19 : Tanning and dressing of leather	0	0	0	0	0
20 : Manf. - wood products	125	123	121	119	117
21 : Manf. - pulp and paper products	3	3	3	3	3
22 : Publishing and Printing	126	124	122	120	118
23 : Manf. - coke, petroleum products	11	12	13	14	16
24 : Manf. - chemicals and chemical products	45	38	30	24	20
25 : Manf. - rubber and plastic products	93	78	63	50	41
26 : Manf. - other non-metallic mineral products	198	195	192	189	185
27 : Manf. - basic metals	271	292	322	354	389
28 : Manf. - fabricated metal products	1,259	1,297	1,345	1,396	1,448
29 : Manf. - other machinery	1,028	1,128	1,268	1,424	1,600
30 : Manf. - office machinery and computers	4	4	5	5	6
31 : Manf. - other electrical machinery	57	62	68	74	82
32 : Manf. - communication equipment	9	10	11	12	13
33 : Manf. - medical instruments	74	80	88	97	106
34 : Manf. - motor vehicles, trailers	917	990	1,088	1,197	1,317
35 : Manf. - transport equipment	254	274	301	332	365
36 : Manf. - furniture; manufacturing n.e.c.	155	167	184	202	223
37 : Recycling	1	1	1	1	1
40 : Electricity, gas, steam and hot water supply	1	1	1	1	1
41 : Collection, purification and distribution of water	0	0	0	0	0
45 : Construction	1,791	2,010	2,322	2,683	3,100
50 : Sale and repair of motor vehicles and fuel	1,093	1,213	1,381	1,572	1,790
51 : Wholesale trade	2,397	2,587	2,845	3,129	3,442
52 : Retail trade	5,303	5,905	6,754	7,725	8,836
55 : Hotels and restaurants	2,034	2,285	2,643	3,058	3,537
60 : Land transport	1,317	1,445	1,624	1,824	2,049
61 : Water transport	2	2	2	3	3
62 : Air transport	1	1	1	1	1
63 : Supporting transport activities/travel agencies	728	799	898	1,008	1,133
64 : Post and telecommunications	1,862	2,009	2,210	2,431	2,674
65 : Financial intermediation	366	395	434	478	526
66 : Insurance and pension funding	167	180	198	218	240
67 : Auxiliary financial activities	43	46	51	56	62
70 : Real estate activities	286	331	398	479	576
71 : Renting of machinery and equipment	244	260	281	303	328
72 : Computer and related activities	346	390	453	527	612
73 : Research and development	15	33	87	229	607
74 : Other business activities	5,232	5,851	6,728	7,736	8,896
75 : Public administration and defence	1,302	1,499	1,787	2,131	2,541
80 : Education	4,086	4,578	5,277	6,083	7,011
85 : Health and social work	3,409	3,868	4,531	5,307	6,215
90 : Sewage and refuse disposal	78	85	94	105	116
91 : Activities of membership organisations	175	206	254	312	383
92 : Recreational, cultural and sporting activities	816	929	1,093	1,286	1,513
93 : Other service activities	371	419	489	570	665
Total	38,429	42,529	48,375	55,182	63,223

Projected Growth Rates (% pa)

	2007-2011	2011-2016	2016-2021	2021-2026
01 : Agriculture/Hunting, etc.	-4.3%	-4.3%	-4.3%	-4.3%
10 : Coal Mining, Peat Extraction	NA	NA	NA	NA
11 : Petroleum, Oil/Gas Services	NA	NA	NA	NA
14 : Other mining and quarry	1.9%	1.9%	1.9%	1.9%
15 : Manf. - food and beverages	1.9%	1.9%	1.9%	1.9%
16 : Manf. - tobacco	NA	NA	NA	NA
17 : Manf. - textiles	-4.3%	-4.3%	-4.3%	-4.3%
18 : Manf. - wearing apparel	-4.3%	-4.3%	-4.3%	-4.3%
19 : Tanning and dressing of leather	NA	NA	NA	NA
20 : Manf. - wood products	-0.3%	-0.3%	-0.3%	-0.3%
21 : Manf. - pulp and paper products	-0.3%	-0.3%	-0.3%	-0.3%
22 : Publishing and Printing	-0.3%	-0.3%	-0.3%	-0.3%
23 : Manf. - coke, petroleum products	1.9%	1.9%	1.9%	1.9%
24 : Manf. - chemicals and chemical products	-4.3%	-4.3%	-4.3%	-4.3%
25 : Manf. - rubber and plastic products	-4.3%	-4.3%	-4.3%	-4.3%
26 : Manf. - other non-metallic mineral products	-0.3%	-0.3%	-0.3%	-0.3%
27 : Manf. - basic metals	1.9%	1.9%	1.9%	1.9%
28 : Manf. - fabricated metal products	0.7%	0.7%	0.7%	0.7%
29 : Manf. - other machinery	2.4%	2.4%	2.4%	2.4%
30 : Manf. - office machinery and computers	1.9%	1.9%	1.9%	1.9%
31 : Manf. - other electrical machinery	1.9%	1.9%	1.9%	1.9%
32 : Manf. - communication equipment	1.9%	1.9%	1.9%	1.9%
33 : Manf. - medical instruments	1.9%	1.9%	1.9%	1.9%
34 : Manf. - motor vehicles, trailers	1.9%	1.9%	1.9%	1.9%
35 : Manf. - transport equipment	1.9%	1.9%	1.9%	1.9%
36 : Manf. - furniture; manufacturing n.e.c.	1.9%	1.9%	1.9%	1.9%
37 : Recycling	1.9%	1.9%	1.9%	1.9%
40 : Electricity, gas, steam and hot water supply	1.9%	1.9%	1.9%	1.9%
41 : Collection, purification and distribution of water	NA	NA	NA	NA
45 : Construction	2.9%	2.9%	2.9%	2.9%
50 : Sale and repair of motor vehicles and fuel	2.6%	2.6%	2.6%	2.6%
51 : Wholesale trade	1.9%	1.9%	1.9%	1.9%
52 : Retail trade	2.7%	2.7%	2.7%	2.7%
55 : Hotels and restaurants	3.0%	3.0%	3.0%	3.0%
60 : Land transport	2.4%	2.4%	2.4%	2.4%
61 : Water transport	1.9%	1.9%	1.9%	1.9%
62 : Air transport	1.9%	1.9%	1.9%	1.9%
63 : Supporting transport activities/travel agencies	2.4%	2.4%	2.4%	2.4%
64 : Post and telecommunications	1.9%	1.9%	1.9%	1.9%
65 : Financial intermediation	1.9%	1.9%	1.9%	1.9%
66 : Insurance and pension funding	1.9%	1.9%	1.9%	1.9%
67 : Auxiliary financial activities	1.9%	1.9%	1.9%	1.9%
70 : Real estate activities	3.8%	3.8%	3.8%	3.8%
71 : Renting of machinery and equipment	1.6%	1.6%	1.6%	1.6%
72 : Computer and related activities	3.0%	3.0%	3.0%	3.0%
73 : Research and development	21.5%	21.5%	21.5%	21.5%
74 : Other business activities	2.8%	2.8%	2.8%	2.8%
75 : Public administration and defence	3.6%	3.6%	3.6%	3.6%
80 : Education	2.9%	2.9%	2.9%	2.9%
85 : Health and social work	3.2%	3.2%	3.2%	3.2%
90 : Sewage and refuse disposal	2.1%	2.1%	2.1%	2.1%
91 : Activities of membership organisations	4.2%	4.2%	4.2%	4.2%
92 : Recreational, cultural and sporting activities	3.3%	3.3%	3.3%	3.3%
93 : Other service activities	3.1%	3.1%	3.1%	3.1%
Total	2.6%	2.6%	2.7%	2.8%

Employment Projections - Nuneaton & Bedworth**Reduced Out-Commuting Scenario (11,000 New Dwellings) - Selected Sectors Only**

	2007	2011	2016	2021	2026
	Actual				
M1 Food & Beverages	164	177	195	214	236
M2 Wood & Wood Products	125	123	121	119	117
M3 Printing & Publishing	126	124	122	120	118
M4 Chemical, Plastic & Non-Metallic Materials/Products	336	311	285	263	245
M5 Basic Metals	271	292	322	354	389
M6 Metal Goods	1,259	1,297	1,345	1,396	1,448
M7 Mechanical Engineering	1,028	1,128	1,268	1,424	1,600
M8 Electronics, Electrical Engineering & Instruments	144	155	171	188	207
M9 Motor Vehicles & Other Transport Equipment	1,171	1,264	1,390	1,529	1,682
M10 Manufacturing nes	288	282	281	285	294
S1 Utilities	79	86	95	106	118
S2 Construction	1,791	2,010	2,322	2,683	3,100
S3 Wholesale Distribution	2,397	2,587	2,845	3,129	3,442
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	1,093	1,213	1,381	1,572	1,790
S5 Retailing	5,303	5,905	6,754	7,725	8,836
S6 Hotels & Catering	2,034	2,285	2,643	3,058	3,537
S7 Land Transport	2,045	2,244	2,521	2,833	3,182
S8 Communications	1,862	2,009	2,210	2,431	2,674
S9 Insurance, Banking & Finance	576	622	684	752	827
S10 Computing Services	346	390	453	527	612
S11 Real Estate & Professional Services	301	364	485	708	1,183
S12 Other Business Services	5,232	5,851	6,728	7,736	8,896
S13 Public Administration & Defence	1,302	1,499	1,787	2,131	2,541
S14 Education	4,086	4,578	5,277	6,083	7,011
S15 Health & Social Work	3,409	3,868	4,531	5,307	6,215
S16 Recreational, cultural and sporting activities	816	929	1,093	1,286	1,513
S17 Other Services	790	885	1,023	1,185	1,376
Total	38,374	42,480	48,333	55,143	63,188

Projected Growth Rates (% pa)

	2007-2011	2011-2016	2016-2021	2021-2026
M1 Food & Beverages	1.9%	1.9%	1.9%	1.9%
M2 Wood & Wood Products	-0.3%	-0.3%	-0.3%	-0.3%
M3 Printing & Publishing	-0.3%	-0.3%	-0.3%	-0.3%
M4 Chemical, Plastic & Non-Metallic Materials/Products	-1.9%	-1.7%	-1.6%	-1.4%
M5 Basic Metals	1.9%	1.9%	1.9%	1.9%
M6 Metal Goods	0.7%	0.7%	0.7%	0.7%
M7 Mechanical Engineering	2.4%	2.4%	2.4%	2.4%
M8 Electronics, Electrical Engineering & Instruments	1.9%	1.9%	1.9%	1.9%
M9 Motor Vehicles & Other Transport Equipment	1.9%	1.9%	1.9%	1.9%
M10 Manufacturing nes	-0.5%	-0.1%	0.3%	0.6%
S1 Utilities	2.1%	2.1%	2.1%	2.1%
S2 Construction	2.9%	2.9%	2.9%	2.9%
S3 Wholesale Distribution	1.9%	1.9%	1.9%	1.9%
S4 Retail of Automotive Fuel and Motor Vehicles (incl. Repair)	2.6%	2.6%	2.6%	2.6%
S5 Retailing	2.7%	2.7%	2.7%	2.7%
S6 Hotels & Catering	3.0%	3.0%	3.0%	3.0%
S7 Land Transport	2.4%	2.4%	2.4%	2.4%
S8 Communications	1.9%	1.9%	1.9%	1.9%
S9 Insurance, Banking & Finance	1.9%	1.9%	1.9%	1.9%
S10 Computing Services	3.0%	3.0%	3.0%	3.0%
S11 Real Estate & Professional Services	4.9%	5.9%	7.9%	10.8%
S12 Other Business Services	2.8%	2.8%	2.8%	2.8%
S13 Public Administration & Defence	3.6%	3.6%	3.6%	3.6%
S14 Education	2.9%	2.9%	2.9%	2.9%
S15 Health & Social Work	3.2%	3.2%	3.2%	3.2%
S16 Recreational, cultural and sporting activities	3.3%	3.3%	3.3%	3.3%
S17 Other Services	2.9%	2.9%	3.0%	3.0%
Total	2.6%	2.6%	2.7%	2.8%

APPENDIX K – FLOORSPACE FORECASTS

BASELINE SCENARIO**Floorspace requirements by land use class and year**

	2007	2011	2016	2021	2026
A1	37,664	37,058	37,905	38,510	38,510
A2	79,125	78,378	79,221	81,869	81,869
A3	27,632	26,431	27,632	27,632	28,833
B1a	210,223	207,101	211,848	217,666	222,208
B1b	452	438	353	409	409
B1c	4,695	4,695	4,695	4,695	4,695
B2	206,249	188,831	174,565	162,574	154,816
B8	355,078	326,762	326,970	335,860	341,754
C1	1,454	1,391	1,454	1,454	1,518
Total	922,571	871,084	864,644	870,671	874,613

Floorspace requirements for different land-use categories: % change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		98%	101%	102%	102%
A2		99%	100%	103%	103%
A3		96%	100%	100%	104%
B1a		99%	101%	104%	106%
B1b		97%	78%	91%	91%
B1c		100%	100%	100%	100%
B2		92%	85%	79%	75%
B8		92%	92%	95%	96%
C1		96%	100%	100%	104%
Total		94%	94%	94%	95%

Floorspace requirements for different land-use categories: absolute change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		-606	241	847	847
A2		-747	95	2,744	2,744
A3		-1,201	0	0	1,201
B1a		-3,122	1,625	7,443	11,985
B1b		-14	-99	-42	-42
B1c		0	0	0	0
B2		-17,418	-31,683	-43,674	-51,432
B8		-28,316	-28,107	-19,217	-13,323
C1		-63	0	0	63
Total		-51,487	-57,927	-51,901	-47,958

PAST TRENDS SCENARIO**Floorspace requirements by land use class and year**

	2007	2011	2016	2021	2026
A1	37,664	38,317	39,150	40,001	40,871
A2	79,125	80,607	82,580	84,689	86,936
A3	27,632	27,311	26,915	26,524	26,140
B1a	210,223	217,385	227,474	239,845	257,231
B1b	452	505	620	870	1,471
B1c	4,695	4,303	3,869	3,489	3,156
B2	206,249	198,704	190,699	184,054	178,596
B8	355,078	366,571	381,555	397,264	413,737
C1	1,454	1,437	1,417	1,396	1,376
Total	922,571	935,139	954,279	978,134	1,009,515

Floorspace requirements for different land-use categories: % change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		102%	104%	106%	109%
A2		102%	104%	107%	110%
A3		99%	97%	96%	95%
B1a		103%	108%	114%	122%
B1b		112%	137%	193%	326%
B1c		92%	82%	74%	67%
B2		96%	92%	89%	87%
B8		103%	107%	112%	117%
C1		99%	97%	96%	95%
Total		101%	103%	106%	109%

Floorspace requirements for different land-use categories: absolute change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		653	1,486	2,337	3,208
A2		1,482	3,455	5,564	7,811
A3		-321	-717	-1,107	-1,492
B1a		7,162	17,250	29,622	47,007
B1b		53	169	419	1,020
B1c		-392	-826	-1,206	-1,538
B2		-7,545	-15,550	-22,195	-27,652
B8		11,493	26,478	42,186	58,660
C1		-17	-38	-58	-79
Total		12,568	31,708	55,562	86,944

SCENARIO A-1 (11,000 NEW DWELLINGS) Floorspace requirements by land use class and year

	2007	2011	2016	2021	2026
A1	37,664	39,377	41,628	44,008	46,525
A2	79,125	83,157	88,591	94,499	100,929
A3	27,632	29,229	31,356	33,637	36,085
B1a	210,223	222,422	239,317	259,126	284,650
B1b	452	522	662	943	1,580
B1c	4,695	4,698	4,702	4,705	4,709
B2	206,249	197,243	192,638	190,463	189,366
B8	355,078	358,730	363,418	368,246	373,219
C1	1,454	1,538	1,650	1,770	1,899
Total	922,571	936,915	963,962	997,399	1,038,963

Floorspace requirements for different land-use categories: % change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		105%	111%	117%	124%
A2		105%	112%	119%	128%
A3		106%	113%	122%	131%
B1a		106%	114%	123%	135%
B1b		115%	147%	209%	350%
B1c		100%	100%	100%	100%
B2		96%	93%	92%	92%
B8		101%	102%	104%	105%
C1		106%	113%	122%	131%
Total		102%	104%	108%	113%

Floorspace requirements for different land-use categories: absolute change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		1,713	3,964	6,345	8,862
A2		4,032	9,465	15,374	21,804
A3		1,597	3,724	6,005	8,453
B1a		12,198	29,094	48,903	74,427
B1b		70	211	491	1,128
B1c		3	7	11	14
B2		-9,006	-13,611	-15,785	-16,882
B8		3,652	8,341	13,169	18,142
C1		84	196	316	445
Total		14,344	41,390	74,828	116,392

SCENARIO A-2 (14,500 NEW DWELLINGS) Floorspace requirements by land use class and year

	2007	2011	2016	2021	2026
A1	37,664	39,949	43,002	46,288	49,825
A2	79,125	84,430	91,717	99,815	108,825
A3	27,632	29,740	32,603	35,742	39,183
B1a	210,223	224,698	244,939	268,734	298,990
B1b	452	534	693	998	1,666
B1c	4,695	4,713	4,736	4,760	4,783
B2	206,249	199,619	196,001	194,862	195,077
B8	355,078	359,857	365,991	372,307	378,810
C1	1,454	1,565	1,716	1,881	2,062
Total	922,571	945,106	981,398	1,025,385	1,079,221

Floorspace requirements for different land-use categories: % change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		106%	114%	123%	132%
A2		107%	116%	126%	138%
A3		108%	118%	129%	142%
B1a		107%	117%	128%	142%
B1b		118%	153%	221%	369%
B1c		100%	101%	101%	102%
B2		97%	95%	94%	95%
B8		101%	103%	105%	107%
C1		108%	118%	129%	142%
Total		102%	106%	111%	117%

Floorspace requirements for different land-use categories: absolute change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		2,285	5,338	8,624	12,161
A2		5,305	12,592	20,690	29,700
A3		2,108	4,971	8,110	11,551
B1a		14,475	34,716	58,510	88,767
B1b		82	241	546	1,214
B1c		18	42	65	88
B2		-6,629	-10,248	-11,387	-11,171
B8		4,780	10,913	17,229	23,733
C1		111	262	427	608
Total		22,535	58,827	102,814	156,649

REDUCED OUT-COMMUTING SCENARIO (11,000 NEW DWELLINGS)**Floorspace requirements by land use class and year**

	2007	2011	2016	2021	2026
A1	37,664	41,948	47,995	54,914	62,831
A2	79,125	88,495	101,847	117,297	135,184
A3	27,632	31,045	35,910	41,538	48,047
B1a	210,223	236,302	274,051	319,281	375,662
B1b	452	546	728	1,063	1,775
B1c	4,695	5,066	5,573	6,129	6,742
B2	206,249	218,587	236,087	256,043	278,657
B8	355,078	385,798	428,003	474,877	526,942
C1	1,454	1,634	1,890	2,186	2,529
Total	922,571	1,009,421	1,132,084	1,273,328	1,438,369

Floorspace requirements for different land-use categories: % change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		111%	127%	146%	167%
A2		112%	129%	148%	171%
A3		112%	130%	150%	174%
B1a		112%	130%	152%	179%
B1b		121%	161%	235%	393%
B1c		108%	119%	131%	144%
B2		106%	114%	124%	135%
B8		109%	121%	134%	148%
C1		112%	130%	150%	174%
Total		109%	123%	138%	156%

Floorspace requirements for different land-use categories: absolute change compared to 2007

NB shows the change for each year compared to the base year of 2007 (not compared to preceding year in table)

	2007	2011	2016	2021	2026
A1		4,284	10,331	17,250	25,167
A2		9,370	22,722	38,171	56,059
A3		3,413	8,278	13,906	20,416
B1a		26,079	63,828	109,057	165,439
B1b		95	276	611	1,323
B1c		372	878	1,435	2,047
B2		12,338	29,838	49,794	72,408
B8		30,720	72,926	119,800	171,865
C1		180	436	732	1,075
Total		86,850	209,513	350,757	515,798

APPENDIX L – SECTORAL TRENDS - ABI DATA, 1998-2007

INDUSTRY	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
01 : Agriculture/Hunting, etc.	77	71	60	43	39	37	37	38	43	44
10 : Coal Mining, Peat Extraction	5	22	19	16	0	0	0	0	0	0
11 : Petroleum, Oil/Gas Services	0	0	3	1	1	0	0	0	0	0
14 : Other mining and quarry	26	136	116	9	12	12	8	1	5	8
15 : Manf.- food and beverages	100	84	53	73	51	57	113	114	154	164
16 : Manf. - tobacco	0	0	0	0	4	0	0	0	0	0
17 : Manf. - textiles	343	359	262	90	77	152	156	137	139	91
18 : Manf. - wearing apparel	674	300	191	221	214	135	117	68	48	27
19 : Tanning and dressing of leather	3	0	0	0	1	0	0	0	0	0
20 : Manf. - wood products	67	44	24	17	20	33	46	99	125	125
21 : Manf. - pulp and paper products	34	15	5	1	1	3	3	4	3	3
22 : Publishing and Printing	276	243	204	273	244	614	469	445	448	126
23 : Manf. - coke, petroleum products	0	0	0	0	0	9	7	8	8	11
24 : Manf. - chemicals and chemical products	285	249	282	183	87	185	142	169	45	45
25 : Manf. - rubber and plastic products	460	537	43	63	55	133	183	124	172	93
26 : Manf. - other non-metallic mineral products	269	275	278	249	236	231	249	206	179	198
27 : Manf. basic metals	537	379	252	343	240	222	257	234	308	271
28 : Manf. - fabricated metal products	3,453	2,088	2,488	1,605	1,663	1,394	1,911	1,364	1,323	1,259
29 : Manf. - other machinery	974	1,049	1,050	894	989	1,079	1,074	1,082	1,073	1,028
30 : Manf. - office machinery and computers	0	0	2	2	3	5	3	8	4	4
31 : Manf. - other electrical machinery	209	208	145	135	145	113	95	90	59	57
32 : Manf. - communication equipment	30	25	25	23	28	34	32	12	10	9
33 : Manf. - medical instruments	118	87	81	111	125	103	98	56	73	74
34 : Manf. - motor vehicles, trailers	1,322	1,133	1,739	1,444	1,543	1,814	1,308	1,156	1,101	917
35 : Manf. - transport equipment	291	327	221	266	253	395	277	283	307	254
36 : Manf. - furniture; manufacturing n.e.c.	323	423	107	96	156	86	93	221	150	155
37 : Recycling	0	0	1	1	1	3	3	4	2	1
40 : Electricity, gas, steam and hot water supply	0	6	5	7	0	0	0	1	5	1
41 : Collection, purification and distribution of water	73	35	28	37	0	0	0	0	0	0
45 : Construction	1,822	2,360	1,522	1,972	1,818	1,181	1,269	1,569	1,646	1,791
50 : Sale and repair of motor vehicles and fuel	811	878	827	931	1,320	960	1,550	856	1,068	1,093
51 : Wholesale trade	1,803	1,640	2,048	1,889	1,923	2,385	2,080	2,279	2,278	2,397
52 : Retail trade	4,915	4,597	4,079	4,897	4,953	4,996	4,849	4,766	5,176	5,303
55 : Hotels and restaurants	2,144	2,073	1,931	2,309	2,092	3,025	2,535	2,309	1,950	2,034
60 : Land transport	1,042	1,045	1,323	1,247	1,241	1,273	1,250	1,463	1,407	1,317
61 : Water transport	0	0	0	0	0	0	0	0	0	2
62 : Air transport	0	1	1	1	1	0	1	1	1	1
63 : Supporting transport activities/travel agencies	252	598	145	503	696	673	1,202	1,410	875	728
64 : Post and telecommunications	1,277	1,206	1,337	1,069	1,151	1,301	1,251	1,231	1,416	1,862
65 : Financial intermediation	493	477	451	483	466	435	382	401	373	366
66 : Insurance and pension funding	370	380	392	366	339	353	392	488	455	167
67 : Auxiliary financial activities	95	90	101	54	39	38	66	52	56	43
70 : Real estate activities	219	234	197	190	217	197	276	360	235	286
71 : Renting of machinery and equipment	193	275	441	338	268	271	178	181	279	244
72 : Computer and related activities	334	368	288	267	272	251	212	297	300	346
73 : Research and development	6	3	3	3	3	3	44	43	35	15
74 : Other business activities	2,611	2,825	2,918	2,732	2,669	2,197	2,893	4,361	5,431	5,232
75 : Public administration and defence	1,320	1,386	1,375	1,471	1,500	1,401	1,603	1,568	1,457	1,302
80 : Education	3,444	3,607	3,337	3,505	3,262	3,425	3,617	3,468	4,001	4,086
85 : Health and social work	2,106	2,151	2,367	3,794	4,072	4,048	4,181	4,521	4,457	3,409
90 : Sewage and refuse disposal	56	25	41	53	71	67	92	101	98	78
91 : Activities of membership organisations	236	301	213	181	236	235	169	167	211	175
92 : Recreational, cultural and sporting activities	584	1,005	874	1,177	1,155	966	919	794	914	816
93 : Other service activities	236	346	247	314	367	368	444	391	421	371
Total	36,318	35,966	34,142	35,949	36,319	36,898	38,136	39,001	40,324	38,429

APPENDIX M – DETAILED FORECASTS OF EMPLOYMENT LAND DEMAND

Baseline

Baseline - Total Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	37,664	37,058	37,905	38,510	38,510
A2	79,125	78,378	79,221	81,869	81,869
A3	27,632	26,431	27,632	27,632	28,833
B1a	210,223	207,101	211,848	217,666	222,208
B1b	452	438	353	409	409
B1c	4,695	4,695	4,695	4,695	4,695
B2	206,249	188,831	174,565	162,574	154,816
B8	355,078	326,762	326,970	335,860	341,754
C1	1,454	1,391	1,454	1,454	1,518
Total	922,571	871,084	864,644	870,671	874,613

Baseline - Absolute Change in Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	0	-606	241	847	847
A2	0	-747	95	2,744	2,744
A3	0	-1,201	0	0	1,201
B1a	0	-3,122	1,625	7,443	11,985
B1b	0	-14	-99	-42	-42
B1c	0	0	0	0	0
B2	0	-17,418	-31,683	-43,674	-51,432
B8	0	-28,316	-28,107	-19,217	-13,323
C1	0	-63	0	0	63
Total	0	-51,487	-57,927	-51,901	-47,958

Adjusted to Fit Churn Model

Bulk Class	2007	2011	2016	2021	2026
Offices	0	0	1,526	7,400	11,943
Factories	0	0	0	0	0
Warehouses	0	0	0	0	0
Total	0	0	1,526	7,400	11,943

Addition of Churn (1% per annum)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	3,920	10,346	21,120	30,563
Factories	0	18,720	42,120	65,520	88,920
Warehouses	0	17,680	39,780	61,880	83,980
Total	0	40,320	92,246	148,520	203,463

Removal of Leakage (to Non Employment Areas)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	2,548	6,725	13,728	19,866
Factories	0	16,848	37,908	58,968	80,028
Warehouses	0	15,912	35,802	55,692	75,582
Total	0	35,308	80,435	128,388	175,476

Allowance for Completions / Relocations

Bulk Class	2007	2011	2016	2021	2026
Offices	0	10,701	14,878	21,881	28,018
Factories	0	32,590	53,650	74,710	95,770
Warehouses	0	38,803	58,693	78,583	98,473
Total	0	82,093	127,220	175,174	222,261

Conversion to Land Requirement (ha)

Bulk Class	2007	2011	2016	2021	2026
Offices	0.00	3.62	5.04	7.41	9.48
Factories	0.00	8.96	14.75	20.55	26.34
Warehouses	0.00	8.54	12.91	17.29	21.66
Total	0.00	21.12	32.70	45.24	57.48

RSS Scenario - 11,000 New Homes

RSS Scenario - 11,000 New Homes - Total Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	37,664	39,377	41,628	44,008	46,525
A2	79,125	83,157	88,591	94,499	100,929
A3	27,632	29,229	31,356	33,637	36,085
B1a	210,223	222,422	239,317	259,126	284,650
B1b	452	522	662	943	1,580
B1c	4,695	4,698	4,702	4,705	4,709
B2	206,249	197,243	192,638	190,463	189,366
B8	355,078	358,730	363,418	368,246	373,219
C1	1,454	1,538	1,650	1,770	1,899
Total	922,571	936,916	963,962	997,397	1,038,962

RSS Scenario - 11,000 New Homes - Absolute Change in Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	0	1,713	3,964	6,344	8,861
A2	0	4,032	9,466	15,374	21,804
A3	0	1,597	3,724	6,005	8,453
B1a	0	12,199	29,094	48,903	74,427
B1b	0	70	210	491	1,128
B1c	0	3	7	10	14
B2	0	-9,006	-13,611	-15,786	-16,883
B8	0	3,653	8,341	13,169	18,142
C1	0	84	196	316	445
Total	0	14,345	41,391	74,826	116,391

Adjusted to Fit Churn Model

Bulk Class	2007	2011	2016	2021	2026
Offices	0	12,269	29,304	49,394	75,555
Factories	0	0	0	0	0
Warehouses	0	3,653	8,341	13,169	18,142
Total	0	15,921	37,644	62,562	93,696

Addition of Churn (1% per annum)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	16,189	38,124	63,114	94,175
Factories	0	18,720	42,120	65,520	88,920
Warehouses	0	21,333	48,121	75,049	102,122
Total	0	56,241	128,364	203,682	285,216

Removal of Leakage (to Non Employment Areas)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	10,523	24,781	41,024	61,214
Factories	0	16,848	37,908	58,968	80,028
Warehouses	0	19,199	43,308	67,544	91,909
Total	0	46,570	105,997	167,536	233,151

Allowance for Completions / Relocations

Bulk Class	2007	2011	2016	2021	2026
Offices	0	18,675	32,933	49,177	69,366
Factories	0	32,590	53,650	74,710	95,770
Warehouses	0	42,090	66,200	90,435	114,800
Total	0	93,355	152,782	214,321	279,936

Conversion to Land Requirement (ha)

Bulk Class	2007	2011	2016	2021	2026
Offices	0.00	6.32	11.15	16.64	23.48
Factories	0.00	8.96	14.75	20.55	26.34
Warehouses	0.00	9.26	14.56	19.90	25.26
Total	0.00	24.54	40.46	57.09	75.07

RSS Scenario - 14,500 New Homes

RSS Scenario - 14,500 New Homes - Total Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	37,664	39,949	43,002	46,288	49,825
A2	79,125	84,430	91,717	99,815	108,825
A3	27,632	29,740	32,603	35,742	39,183
B1a	210,223	224,698	244,939	268,734	298,990
B1b	452	534	693	998	1,666
B1c	4,695	4,713	4,736	4,760	4,783
B2	206,249	199,619	196,001	194,862	195,077
B8	355,078	359,857	365,991	372,307	378,810
C1	1,454	1,565	1,716	1,881	2,062
Total	922,571	945,105	981,398	1,025,387	1,079,221

RSS Scenario - 14,500 New Homes - Absolute Change in Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	0	2,285	5,338	8,624	12,161
A2	0	5,305	12,592	20,690	29,700
A3	0	2,108	4,971	8,110	11,551
B1a	0	14,475	34,716	58,511	88,767
B1b	0	82	241	546	1,214
B1c	0	18	41	65	88
B2	0	-6,630	-10,248	-11,387	-11,172
B8	0	4,780	10,914	17,230	23,733
C1	0	111	262	427	608
Total	0	22,534	58,827	102,816	156,650

Adjusted to Fit Churn Model

Bulk Class	2007	2011	2016	2021	2026
Offices	0	14,557	34,957	59,057	89,981
Factories	0	0	0	0	0
Warehouses	0	4,780	10,914	17,230	23,733
Total	0	19,336	45,870	76,286	113,713

Addition of Churn (1% per annum)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	18,477	43,777	72,777	108,601
Factories	0	18,720	42,120	65,520	88,920
Warehouses	0	22,460	50,694	79,110	107,713
Total	0	59,656	136,590	217,406	305,233

Removal of Leakage (to Non Employment Areas)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	12,010	28,455	47,305	70,591
Factories	0	16,848	37,908	58,968	80,028
Warehouses	0	20,214	45,624	71,199	96,941
Total	0	49,072	111,987	177,472	247,560

Allowance for Completions / Relocations

Bulk Class	2007	2011	2016	2021	2026
Offices	0	20,163	36,608	55,458	78,743
Factories	0	32,590	53,650	74,710	95,770
Warehouses	0	43,105	68,515	94,090	119,832
Total	0	95,857	158,772	224,257	294,345

Conversion to Land Requirement (ha)

Bulk Class	2007	2011	2016	2021	2026
Offices	0.00	6.82	12.39	18.77	26.65
Factories	0.00	8.96	14.75	20.55	26.34
Warehouses	0.00	9.48	15.07	20.70	26.36
Total	0.00	25.27	42.22	60.02	79.35

Past Trends

Past Trends - Total Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	37,664	38,317	39,150	40,001	40,871
A2	79,125	80,607	82,580	84,689	86,936
A3	27,632	27,311	26,915	26,524	26,140
B1a	210,223	217,385	227,474	239,845	257,231
B1b	452	505	620	870	1,471
B1c	4,695	4,303	3,869	3,489	3,156
B2	206,249	198,704	190,699	184,054	178,596
B8	355,078	366,571	381,555	397,264	413,737
C1	1,454	1,437	1,417	1,396	1,376
Total	922,571	935,139	954,279	978,134	1,009,515

Past Trends - Absolute Change in Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	0	653	1,486	2,337	3,208
A2	0	1,482	3,455	5,564	7,811
A3	0	-321	-717	-1,107	-1,492
B1a	0	7,162	17,250	29,622	47,007
B1b	0	53	169	419	1,020
B1c	0	-392	-826	-1,206	-1,538
B2	0	-7,545	-15,550	-22,195	-27,652
B8	0	11,493	26,478	42,186	58,660
C1	0	-17	-38	-58	-79
Total	0	12,568	31,708	55,562	86,944

Adjusted to Fit Churn Model

Bulk Class	2007	2011	2016	2021	2026
Offices	0	7,215	17,419	30,041	48,027
Factories	0	0	0	0	0
Warehouses	0	11,493	26,478	42,186	58,660
Total	0	18,708	43,897	72,227	106,687

Addition of Churn (1% per annum)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	11,135	26,239	43,761	66,647
Factories	0	18,720	42,120	65,520	88,920
Warehouses	0	29,173	66,258	104,066	142,640
Total	0	59,028	134,617	213,347	298,207

Removal of Leakage (to Non Employment Areas)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	7,237	17,055	28,445	43,321
Factories	0	16,848	37,908	58,968	80,028
Warehouses	0	26,256	59,632	93,659	128,376
Total	0	50,341	114,595	181,072	251,724

Allowance for Completions / Relocations

Bulk Class	2007	2011	2016	2021	2026
Offices	0	15,390	25,208	36,597	51,473
Factories	0	32,590	53,650	74,710	95,770
Warehouses	0	49,147	82,523	116,551	151,267
Total	0	97,127	161,381	227,857	298,509

Conversion to Land Requirement (ha)

Bulk Class	2007	2011	2016	2021	2026
Offices	0.00	5.21	8.53	12.39	17.42
Factories	0.00	8.96	14.75	20.55	26.34
Warehouses	0.00	10.81	18.16	25.64	33.28
Total	0.00	24.98	41.44	58.57	77.04

Reduced Out-Commuting

Reduced Out-Commuting - Total Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	37,664	41,948	47,995	54,914	62,831
A2	79,125	88,495	101,847	117,297	135,184
A3	27,632	31,045	35,910	41,538	48,047
B1a	210,223	236,302	274,051	319,281	375,662
B1b	452	546	728	1,063	1,775
B1c	4,695	5,066	5,573	6,129	6,742
B2	206,249	218,587	236,087	256,043	278,657
B8	355,078	385,798	428,003	474,877	526,942
C1	1,454	1,634	1,890	2,186	2,529
Total	922,571	1,009,421	1,132,084	1,273,328	1,438,369

Reduced Out-Commuting - Absolute Change in Floorspace Requirement 2007-2026

	2007	2011	2016	2021	2026
A1	0	4,284	10,331	17,250	25,167
A2	0	9,370	22,722	38,171	56,059
A3	0	3,413	8,278	13,906	20,416
B1a	0	26,079	63,828	109,057	165,439
B1b	0	95	276	611	1,323
B1c	0	372	878	1,435	2,047
B2	0	12,338	29,838	49,794	72,408
B8	0	30,720	72,926	119,800	171,865
C1	0	180	436	732	1,075
Total	0	86,850	209,513	350,757	515,798

Adjusted to Fit Churn Model

Bulk Class	2007	2011	2016	2021	2026
Offices	0	26,173	64,104	109,668	166,762
Factories	0	12,710	30,716	51,229	74,455
Warehouses	0	30,720	72,926	119,800	171,865
Total	0	69,604	167,746	280,697	413,082

Addition of Churn (1% per annum)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	30,093	72,924	123,388	185,382
Factories	0	31,430	72,836	116,749	163,375
Warehouses	0	48,400	112,706	181,680	255,845
Total	0	109,924	258,466	421,817	604,602

Removal of Leakage (to Non Employment Areas)

Bulk Class	2007	2011	2016	2021	2026
Offices	0	19,561	47,401	80,202	120,498
Factories	0	28,287	65,552	105,074	147,038
Warehouses	0	43,560	101,435	163,512	230,260
Total	0	91,408	214,388	348,788	497,796

Allowance for Completions / Relocations

Bulk Class	2007	2011	2016	2021	2026
Offices	0	27,713	55,553	88,355	128,651
Factories	0	44,029	81,294	120,816	162,779
Warehouses	0	66,451	124,326	186,403	253,151
Total	0	138,193	261,173	395,574	544,581

Conversion to Land Requirement (ha)

Bulk Class	2007	2011	2016	2021	2026
Offices	0.00	9.38	18.80	29.90	43.54
Factories	0.00	12.11	22.36	33.22	44.76
Warehouses	0.00	14.62	27.35	41.01	55.69
Total	0.00	36.11	68.51	104.14	144.00

APPENDIX N – NBBC / WCC ECONOMIC DEVELOPMENT / TOWN CENTRES THEME GROUP GUIDANCE NOTE

Employment Land Review
Economic Development including Town Centres Theme
Group sub-group* thoughts and comments – 29/07/09

*Please note comments were received from NBBC & WCC only.

Key trends indicated from GVA Grimley's projections:

- Retail convenience (food shopping) comparison (normal white goods) will increase slightly up to 2026.
- Financial and professional services will show an increase.
- Food and drink services (restaurants etc) will show an increase.
- In terms of business - offices shows the largest increase of all.
- Heavy industry shows the largest decrease - but I think we are aware of this.
- There is also a decrease indicated in terms of distribution.
- Post and telecommunications services are to fall significantly.
- Computer related activities will rise slightly.
- Other educational uses will rise lightly.
- Health & social work will rise.

Group comments on the key trend projections:

General

The group agrees that there is a task to be undertaken to look at how we can generate interest from developers to enable us to diversify the economy, and thus achieve what's outlined above.

We agree that high value jobs are needed, but we need to understand more about where they will come from, and the skills required to carry them out.

Thoughts on decrease in distribution & heavy industry

The group believes that distribution space will still be in demand, despite the projection mentioned above. Although this is not necessarily what the borough needs, we feel that it is important that we don't neglect this area, as traditionally it is what the borough has thrived on in terms of employment opportunities and investment.

This is also the case for the industrial decline projection. The location of Nuneaton (specifically its proximity to key transport infrastructure) means the borough will continue to be a location for this type of company.

We feel that the review should have the key message about proactively seeking investment from newly identified sectors, not intentionally discouraging investment in other areas such as distribution and industrial. We still need our existing business parks and industrial estates to prosper.

Thoughts on office increase

The sub-group agrees that an increase in office provision would be good for Nuneaton town. Information from WIPS shows that 56 enquiries for offices in the Nuneaton & Bedworth area were received over the period 01/07/08 -

30/06/09 (of these, 17 were looking for 0 - 250 sq ft of space and 9 enquirers were looking for between 3,000 - 5,000 sq ft of space).

Thoughts on specific sector increases

- We are happy with the projected increases in financial & professional services. This complements the projections for increased office provision, as this sector would be one which we would look to occupy the increased office supply.
- In terms of the projected fall in employment in the post and telecoms sector, the group would be interested in understanding how GVA has come to this conclusion, as the fall is quite significant. For info, WIPs aren't seeing a current demand in this area at the moment – only 2 enquiries in this area over the last 12 months.
- The group agrees with the projections for the increase in floorspace for A3 use. The borough has limited cafe and restaurant provision currently within the town centres, and is an area which is important we address in the future.
- With an increase in housing across the borough, an increase in health & social services will be required, hence the group agree with this projection.

Possible Policy scenario's:

- Firstly, policy on indicating focus of development in the Town Centre for retail and offices and provision of a mixture of other employment including starter units, areas for medium sized businesses and larger expansions. Encourage offices and other high value employment generators in town centres and industrial estates. We should discourage large distribution warehouses etc. This scenario needs intervention in respect of skills and training which we will have to work on through the LSP.
- Secondly, as above but also provision of a regional investment site within the borough 25-50 hectare, with all of the focus as indicated in the first scenario.
- Thirdly and lastly town centres employment generators with retail and smaller amount of office as it may be difficult to create office market in the Nuneaton and Bedworth Town Centres. Then concentration on all industry including heavy manufacturing (vehicles, transport), but again off distribution as members and officers do not want to see too much more of this within the borough.

Group comments on the scenarios:

Thoughts on scenario 1

- The group feels that this is best scenario.

- The town centre is a vital area to focus on. Across the UK, town centres have been adversely affected by the recession, and to enable Nuneaton to compete favourably in the future, investment in the town centre is essential.
- For the town centre, we would suggest focussing on professional services and other business activities (including legal, advertising and marketing). These areas have shown a 'high demand' over the last 12 months - this is based on data from the WIPs. However, the employment and floorspace projections that GVA have submitted, show decrease forecasts for the S9 category of Real Estate & Professional Services. So, we have a mis-match here.
- In addition, the sectors of ICT, motorsport, medical technologies and aerospace are key target sectors for the CSW sub-region. High value employment in these sectors should be promoted. With regard to motorsport, this includes high performance engineering, tuning, automotive engineering and associated supply chains.
- In terms of medical technologies, it is encouraging to see that the projections show an increase in employment and floorspace for health and social work. However, SIC code 33 which looks at the manufacture of medical & optical instruments wasn't selected for analysis.
- Another sector which is growing in its importance is environmental technologies - there might be scope in investigating this further as an employment generator for the borough. For example, WIPs would be proactively looking to attract companies within the renewable energy industry to Judkins Quarry.
- Starter units will be important for the borough. The sub-group believes that entrepreneurship should be encouraged. For info, of the 251 enquiries for N&B (received by WIPs over the period 01/07/08 – 30/06/09), 29.5% were from new start up companies.

Thoughts on scenario 2

- In terms of the provision of a regional investment site (RIS), if sufficient demand for this could be demonstrated, then the group agrees that this could be beneficial for the borough, in terms of the increased employment opportunities arising, and developer investment into the location where the RIS is situated.
- We would recommend a size no larger than 40 hectares - Ansty Park is 40 hectares, so a site smaller than that should be investigated.
- The location of the site would be of vital importance to whether the sub-group believes the borough could sustain such a development – e.g. depends on its proximity to transport infrastructure etc.
- In terms of occupiers for the regional investment site, we would be looking to attract major high quality technology users companies, including those engaged in research & development.

Thoughts on scenario 3

- Despite the challenges associated with the creation of a town centre office market, this is the least preferred option of the group.
- The focus is too much on heavy industry, and not the new sectors identified in the projections above.

Employment Land Review Scenario - Reduce existing and future out commuting scenario

Overall, there are 41,905 jobs located in the Borough, compared to a resident working population of 56,613. Slightly more than two thirds (69%) of these jobs are worked by people living in the Borough with the remainder being supplied by people commuting into the Borough. Put another way, the Borough provides employment for 51% of its economically active residents, with the remainder travelling out of the Borough to work.

Potential scenario should be to provide the shortfall of the additional 14708 jobs for the Borough. To try and ensure that there are sufficient jobs for the existing working population. We can not obviously stop people commuting into the Borough for these jobs, we can however provide the opportunity for additional jobs which people have to commute to get elsewhere.

The scenario should also ensure that with the additional housing that there is also sufficient jobs for the additional 11,000 dwellings.

Table 1 below indicates there is a net outflow of labour across all nine groups. It is considered to change the Borough's employment profile that the scenario should aim to scale back existing growth the recent growth in distribution and other B8 sectors, to stem some of the projected decline in certain B2 sectors, and encourage growth in specific office-based sectors. This will ensure that occupational groups with the most out commuting (skilled trades and process, plant & machinery) will be reduced.

Table 1. Key statistics on the commuting flows of different occupational groups into and out of Nuneaton & Bedworth Borough

Occupational group	No. of employment places	Residential workforce	Net flow (positive is outflow, negative is inflow)	Job balance. (Net flow as a % of employment places)	% of total employment places	% of total residential workforce
Managers & senior officials	5,239	6,848	1,609	31%	13%	12%
Professional occupations	3,587	4,506	919	26%	9%	8%
Associate professionals	4,500	6,195	1,695	38%	11%	11%
Admin & secretarial	5,134	7,128	1,994	39%	12%	13%
Skilled trades	5,387	7,837	2,450	45%	13%	14%
Personal service	3,439	3,997	558	16%	8%	7%
Sales & customer service	3,503	4,302	799	23%	8%	8%
Process, plant & machinery	4,561	7,293	2,732	60%	11%	13%
Elementary occupations	6,555	8,507	1,952	30%	16%	15%

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