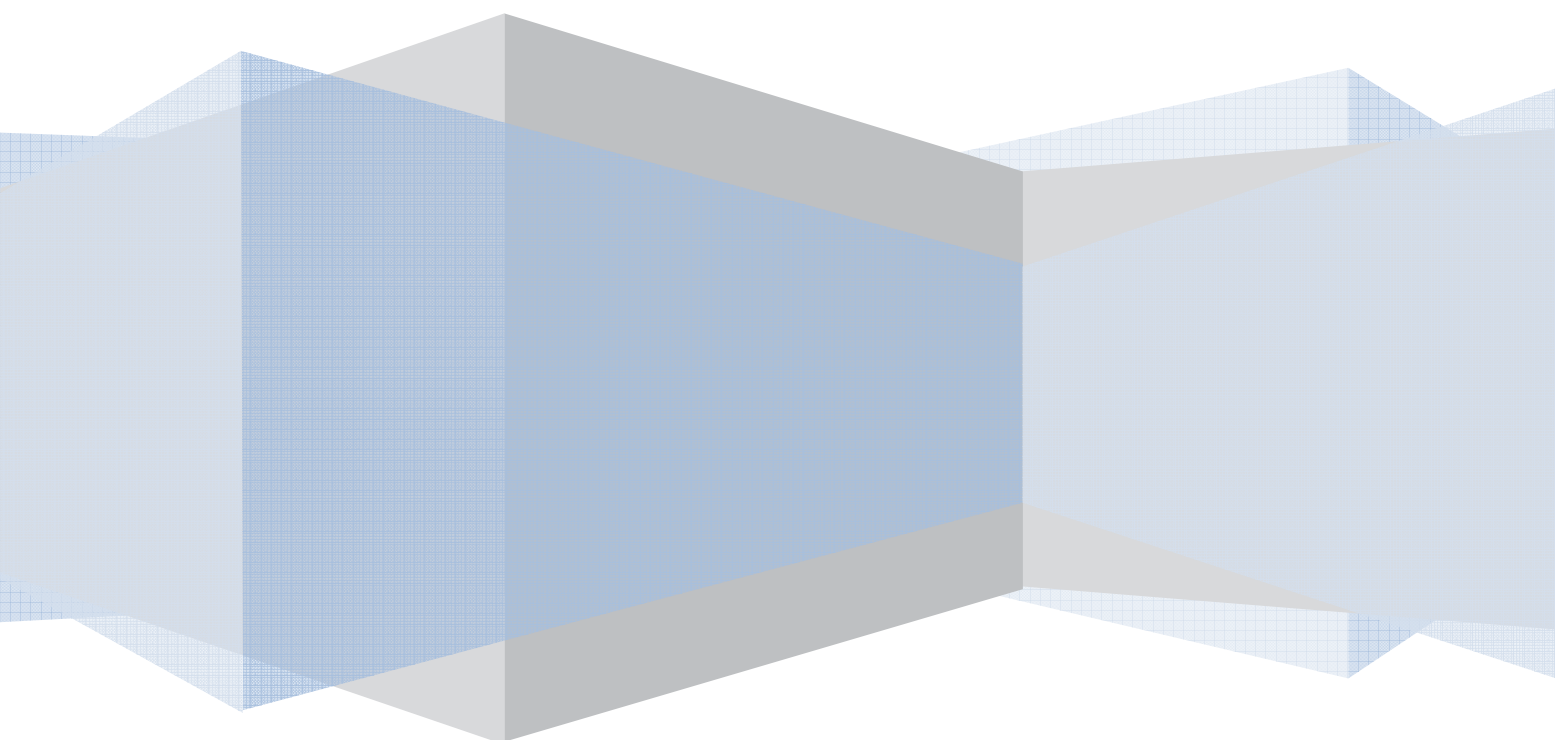


Employment Land Review

Report for Submission

January 2014 Update



Glossary

Employment Land: Land allocated for business, general industrial and storage/distribution uses as defined by Classes B1, B2 & B8 of the Town and Country Planning (Use Classes) Order 1987 or with an extant planning consent for such uses. Employment uses exclude retail, leisure, residential care facilities, mineral extraction and waste disposal.

B1a: Offices other than in a use within Class A2 (Use Class Order 2005 Definition);

B1b: Research and Development – Laboratories, Studios (UCO 2005 Definition);

B1c: Light Industry (UCO 2005 Definition);

B2: General Industrial (UCO 2005 Definition);

B8: Storage or Distribution (UCO 2005 Definition).

FTE: Full Time Equivalent.

Committed Employment Land: All available land allocated for commercial/industrial employment uses or with extant planning permission for employment use, excluding (a) expansion land, (b) land with empty industrial buildings already in-situ, unless those buildings are time expired, and (c) special sites allocated for specific employment uses.

Net Employment Land Requirement: the difference between the likely amount of new employment land required, against the amount of land likely to be lost to non-employment uses over a stated period.

Gross Employment Land Requirement: the total amount of land likely to be required for employment uses over a stated period.

Margin of choice: the addition of a stated factor to the net land requirement projections to ensure that businesses making locational choices have a degree of flexibility or choice.

Gross Internal Floorspace: The entire area inside the external walls of a building and includes corridors, lifts, plant rooms, service accommodation, but excludes internal walls (RICS, Code of Measuring Practice (6th Edition)).

Net Internal Floorspace: The internal area of a building including entrance hallway, kitchens and built in units, but excluding toilets, stairways, lifts, corridors and common areas (RICS, Code of Measuring Practice (6th Edition)).

Land Immediately Available: Land serviced or capable of being serviced in 12 months.

Land Requiring Preparation: Land where major provision of roads and utility services is required, or where major demolition and site remediation is required.

Plot Ratio: the ratio between gross floorspace and total site area.

Employment Density: average floorspace per worker ratio, usually expressed as square metres per worker.

Historic Take-up: The average yearly development of commercial/industrial land for employment uses over the last 10 - 25 years.

Current Take-up: The average yearly take-up of commercial/industrial land for employment uses over the last 5 years.

Restricted Employment Sites: Land in addition to general employment land allocations that is restricted for particular purposes such as airport and port expansion, chemical and steel industry, protecting land for potential rail freight interchanges and sites reserved for major users and inward investment.

Implied Supply: An estimate of the number of years that it would take to consume available land at prevailing take-up rates. It is calculated by dividing the amount of available land by the average yearly take-up.

Strategic Housing Land Availability Assessment (SHLAA): The primary function of the SHLAA is to identify sites with potential for housing; assess how much housing potential the site has; and, assess when the site is likely to be developed.

Preface

The Newcastle Employment Land Review (ELR) has two main purposes:

- to identify the City's employment land requirements for the period 2010 – 2030 based on an analysis of economic forecasts, recent trends and policy aspirations;
- to assess the quality of the City's main employment areas for continued use, and identify potential new land to meet future requirements.

In doing so, it will provide the evidence base to inform the Core Strategy and Urban Core Plan. This Plan will set out the Council's strategy for growing economic competitiveness and prosperity. It will identify the amount, type and broad locations of new employment land that should be provided to 2030.

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Summary

Introduction

1. Newcastle City Council has undertaken an Employment Land Review (ELR) as part of the evidence base for the City's Local Plan. The Employment Land Review will inform the Local Plan, specifically the Core Strategy and Urban Core Plan prepared with Gateshead Council and Newcastle's Site Specific Allocations Development Plan Document (DPD).
2. The ELR will provide robust evidence to demonstrate the scale, type and broad location and deliverability of new employment floorspace and land needed across the City.
3. The ELR has been undertaken in accordance with the three-stage process outlined in the Government's Employment Land Review "the brown book" as follows:
 - Stage 1 – Taking stock of the existing situation – review of key local economic and employment issues.
 - Stage 2 – Creating a picture of future requirements – analysis of economic forecasts, recent trends and local policy aspirations to quantify the amount of industrial and warehousing land and office floorspace required by the city and its key economic sectors in the period 2010 to 2030.
 - Stage 3 – Identifying a "new" portfolio of employment sites – review of the city's main employment areas and sites to assess their suitability for continued employment use and identifying potential sites to fill gaps in future supply.
4. The council commissioned DTZ to provide a local market commentary and on-going guidance to ensure the study's methodology and findings were grounded in 'market reality'.
5. Council officers also met with Economic Development and Planning Policy colleagues in the neighbouring authorities (ie Gateshead, North Tyneside, South Tyneside, and Northumberland) during the course of the study, in order to inform the study's consideration of cross-boundary economic and employment issues.
6. This report comprises an update to the original ELR, published in June 2010, to accommodate new econometric job forecasts produced by St Chad's College, Durham that better reflect the implications of the sustained economic downturn. The report has also been redrafted to take into account the National Planning Policy Framework (NPPF). Contextual information and site assessments in the earlier report have also been updated where appropriate to reflect changing circumstances.

1. Introduction

1.1 Newcastle City Council undertook an Employment Land Review (ELR) in 2010, and this report is an update of the study's findings. The Review aims to inform future policy development and specifically the employment land and related provisions in the Local Plan. The findings of the report are informed by a number of key assessments, including: a review of current policy; sectoral employment forecasts to 2038; socio-economic desktop research; a property market report; site visits and assessments; and, consultation with stakeholders.

Methodology

- 1.2 The ELR update has been carried out in accordance with the three-stage approach advocated by the Government's Employment Land Review guidance published in December 2004. It was undertaken by the Council's Planning Policy team. The Council also commissioned DTZ to provide local market expertise, employment forecasts and on-going guidance to ensure the study's methodology and findings were grounded in 'market reality'.
- 1.3 Officers also met with local commercial property agents and Planning Policy colleagues from the neighbouring authorities during the study to understand key local and cross-boundary economic issues.
- 1.4 The study focuses on employment space needs for the group of "B" Use Classes indicated in Figure 1 below. The study does not consider the future land needs of other employment generating uses such as retail, tourism, healthcare and education, although it recognised that these sectors perform a critical role in providing employment and economic growth opportunities.

Figure 1: B-Class Employment Land Definitions

B1	Business <ul style="list-style-type: none">• Offices other than in use with Class A2• Research and development – laboratories and studios• Light industry
B2	General Industrial <ul style="list-style-type: none">• General industry (unless in B1)
B8	Storage or Distribution <ul style="list-style-type: none">• Storage or distribution centres – wholesale warehouses, distribution centres and repositories

1.5 A key issue underlying the study concerns how the recession in the wider economy and its implications on the commercial property market should be reflected in the analysis. However, it should be emphasised that the Council's Local Plan process will be planning for longer needs to 2030 to coincide with the Core Strategy and Urban Core Plan Period. On this basis, analysis is based on past trends and how it is likely to recover and perform in the future.

- 1.6** The employment portfolio will be refined based on consultation and further evidence gathering (including transport assessments) prior to informing the City's Local Plan process.

Structure of report

- 1.7 This report is structured to follow the recommended three-stage approach.
- 1.8 **Section 2** - sets the scene for the ELR with a summary of the national, regional and local **policy context**.
- 1.9 **Section 3** - examines the **socio-economic characteristics** of the City: comparing the workplace economy and characteristics of the working residents to the regional/national economies to get a better understanding of locally significant issues; the current position of the economy; and, how it is placed for future economic growth.
- 1.10 **Section 4** - sets out the **stakeholder consultation** carried out as part of this study.
- 1.11 **Section 5** - Profiles the **property market**, showing Newcastle's current position, how it has changed in recent years and the main influences on it.
- 1.12 **Section 6** - reports on Stage 1 of the ELR – **taking stock of the existing situation**. This section provides an overview of current stock and employment space in Newcastle.
- 1.13 **Section 7** - describes Stage 2 of the study – **creating a picture of future requirements**. This stage analysed economic forecasts, recent trends and local policy aspirations to quantify the amount of office, industrial and warehousing land floorspace required by the city and its key economic sectors to 2030.
- 1.14 **Section 8** - reports on Stage 3 - **identifying a “new” portfolio of employment sites**. In this stage, a qualitative review of the city's main employment areas and sites was undertaken to assess their suitability for continued employment use, demand and supply were then matched. These site assessments were undertaken between July 2009 and February 2010, and reviewed again in March 2012.
- 1.15 **Section 9** - identifies the sites which will form the '**portfolio**' of employment sites which will form the basis of the Local Plan portfolio and the needs identified in Section 7.
- 1.16 **Section 10** - considers the financial viability of the **employment land portfolio**.
- 1.17 **Section 11** - brings together the key findings of Stages 2 and 3 to provide **conclusions** on the study's results. This section sets out a number of policy **recommendations for the Local Plan**. Once finalised the ELR report will be part of the evidence base used to inform and justify the Council's employment land portfolio and economic development strategy as set out in the Core Strategy and Urban Core Plan.
- 1.18 **Section 11** - also makes **recommendations** for further evidence gathering required to inform and support the Newcastle Development Framework's Site

Allocations and Development Management Development Plan Document.

- 1.19 A **glossary of terms** used is supplied at the front of the main report. Finally, **Appendices** are provided of the results of the Stage 1, Stage 2 and Stage 3 assessments of the city's main industrial and warehousing areas; a detailed analysis of Newcastle's key economic sectors; and the general market commentary and forecasting work provided by DTZ to inform the study.

2. Policy Context & Established Evidence Base

National and regional planning policy places a particular emphasis on sustainable development through a process of:

- reviewing employment and housing land allocations to ensure the supply meets identified needs;
- proactively supporting sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs; and
- encouraging the effective use of land by reusing land that has been previously developed (brownfield land), with a view to promoting regeneration.

The Coalition Government's policy approach to planning has been focused on applying principles of 'Localism' to give LPAs greater autonomy in planning for housing, and in particular setting local housing requirements in their development plans.

The responsibility will therefore fall to LPAs to set employment land requirement figures for their Local Plan. Local land targets will therefore be tested through the Local Plan process and local authorities will need to collect and use reliable information to justify employment land supply policies.

Review of Key Documents

National Policy Guidance

- 2.1 This section sets the scene for the study, and considers the national and regional policy context which frames the existing and future provision of employment across Newcastle. The local policy context is then reviewed, highlighting key areas which need to be considered in developing the employment land policies in the Core Strategy and Urban Core Plan.
- 2.2 Newcastle's planning policies need to fit within the framework set out by national legislation and planning policy. This framework provides material considerations in the production of Local Plans and in the determination of planning applications. The following are of particular relevance to employment land within Newcastle:

Localism Act (2011)

- 2.3 Section 110 of the Localism Act sets out a 'duty to cooperate' for all local planning authorities and county councils in England. The new duty relates specifically to matters of sustainable development or strategic issues which will have a significant impact on more than one local planning area. The Act places a duty on local planning authorities to set out specific policies to address these strategic issues and requires them to consider joint approaches to policy and plan making.

National Planning Policy Framework (March 2012)

- 2.5 The National Planning Policy Framework (NPPF) sets out the Government's economic, environmental and social planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance notes and

some Circulars with a single document.

2.6 The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development, which should be seen as a 'golden thread' running through both plan-making and decision taking. The document states that there are three dimensions to sustainable development: economic, social and environmental. The economic role that the planning system must perform involves contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure [7].

2.7 Within the overarching 'presumption in favour' of sustainable development, the NPPF identifies 12 core land use planning principles that should underpin both plan-making and decision taking. These 12 principles are that planning should (inter alia):

- be genuinely plan-led; based on joint working and co-operation to address larger than local issues;
- proactively drive and support sustainable economic development identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth;
- promote the vitality of our main urban areas, protecting the Green Belts around them, recognising the intrinsic character and beauty of the countryside and supporting thriving rural communities within it;
- encourage the reuse of existing resources, including conversion of existing buildings;
- prefer development land of lesser environmental value;
- encourage the effective use of land by reusing previously developed land;
- promote mixed use developments; and
- actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable [17].

2.8 The NPPF states that 'significant weight' should be placed on the need to support economic growth through the planning system. To help achieve economic growth, Local Plans should:

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;

- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit [21].

2.9 The NPPF also highlights that allocated employment sites for which there is no reasonable prospect of development should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities [22].

2.10 The NPPF confirms that offices are a ‘main town centre use’, and as such, Local Planning Authorities (LPAs) must allocate a range of office sites that meet identified needs in full. LPAs should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan:

‘They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale. [24]’

2.11 This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development. Furthermore, LPAs should normally approve planning applications for change to residential use and any associated development from commercial buildings (currently in the B use classes) where there is an identified need for additional housing in that area, provided that there are not strong economic reasons why such development would be inappropriate [51].

The Plan for Growth (HM Treasury, March 2011)

2.12 Against a backdrop of faltering economic growth, the Chancellor’s 2011 Budget focussed on the long-term rebuilding of Britain’s economy. The Government introduced ‘The Plan for Growth’, a strategy document outlining their ambitions to put the UK on a path to sustainable, long-term economic growth. The document affirmed the Budget’s objectives of creating a stronger and more sustainable economy, with growth more evenly shared across the country and between different sectors.

Ministerial Statement on Planning for Growth (March 2011)

2.13 In this context, Greg Clark, the Minister of State for Decentralisation, set out the steps the Government expects LPAs to take to help secure a swift return to economic growth:

'The Government's top priority in reforming the planning system is to promote sustainable economic growth and jobs...the answer to development and growth should wherever possible be yes, except where this would compromise the key sustainable development principles set out in national planning policy'.

Employment Land Reviews: Guidance Note, ODPM 2004

2.14 The guide's stated purpose is to help:

- assess the future demand for employment land;
- assess the future supply of sites for employment;
- assess the suitability of individual sites, whether existing, permitted or proposed for future employment uses;
- identify sites which are clearly unlikely to be required by the market or are now unsustainable for employment development;
- develop appropriate future policies and proposals ... particularly in LDFs; and
- improve systems for monitoring outcomes and reviewing employment policies and programmes.

2.15 The guide recommends a joint approach to employment and housing. Planning authorities should (2.8):

- undertake the employment land review as far as possible at the same time as they are reviewing housing capacity (and demographic change);
- adopt consistent assumptions and approaches across their housing capacity studies and their employment land reviews;
- take account of both housing and employment requirements as well as the economics of development and landowners' intentions, when assessing the likelihood that existing or allocated employment sites will remain in, or come forward for, employment uses within the plan period; and
- adopt a systematic approach to assessing the development potential of sites suitable for mixed use development, where these will include either housing or employment.

2.16 Both employment land reviews and housing capacity studies must take account of the growing importance of mixed-use development and the use of area based regeneration and development frameworks, if their findings are to be reliable. However, unless there are extant planning permissions, or a realistic adopted development brief or masterplan, quantification of the likely housing or employment component has to be estimated. Only if land assembly is well advanced, or there is a clear intention to proceed by compulsory purchase, can the timing and the development of multi-ownership development sites be judged accurately. In most authorities, mixed use development will provide a significant component of future

employment land and it is important to recognise and allow for the uncertainty that this introduces into employment capacity estimates.

- 2.17 In Newcastle's case, brownfield mixed use developments, primarily in the City Centre and the adjoining Ouseburn Regeneration Area, involve a close interaction between housing and office space markets, and their respective demand and capacity studies.

Regional Policy & Studies

The North East of England Plan Regional Strategy to 2021, Government Office for the North East, July 2008

- 2.18 An Order to revoke the Regional Strategy for the North East has been laid in Parliament. The Order was laid on the 22 March 2013 and came into force on 15 April 2013.
- 2.19 The Government's stated intention in abolishing RSS is to provide a clear signal of the importance attached to the development and application of local spatial plans, in the form of Local Plans. According to Department of Communities and Local Government (DCLG), local plans drawn up with the help of the community will become the basis for local planning decisions.
- 2.20 Through duty-to-co-operate, Officers from Newcastle City Council meet regularly with colleagues from Northumberland, North Tyneside and Gateshead to discuss cross-boundary issues including employment.

Newcastle upon Tyne Unitary Development Plan 1998

- 2.24 The Unitary Development Plan (UDP) was adopted in 1998. It sets out land uses in Newcastle, guides development and establishes employment land allocations up to the year 2006. These policies were automatically 'saved' for three years by the Council when the Planning and Compulsory Purchase Act (2004) came into force. A number of policies have been further 'saved' in agreement with the Government Office for the North East.
- 2.25 Policy ED1 seeks to ensure the sufficient supply of employment land by identifying a wide range of sites including: strategic sites principally for business and general industrial uses; sites for office development and business uses; site for industry and warehousing; and sites and airport related uses. A total of 382.7ha was allocated under Policy ED1.
- 2.26 Policies ED3.1 and ED3.2 identifies appropriate uses in employment areas, which covers offices, research and development (B1), general industrial (B2) and warehouses and storage (B8).
- 2.27 Under Policy ED3.1 and ED3.2, some 436.27ha was retained in employment use.

NewcastleGateshead One Core Strategy: Draft Plan (September 2011)

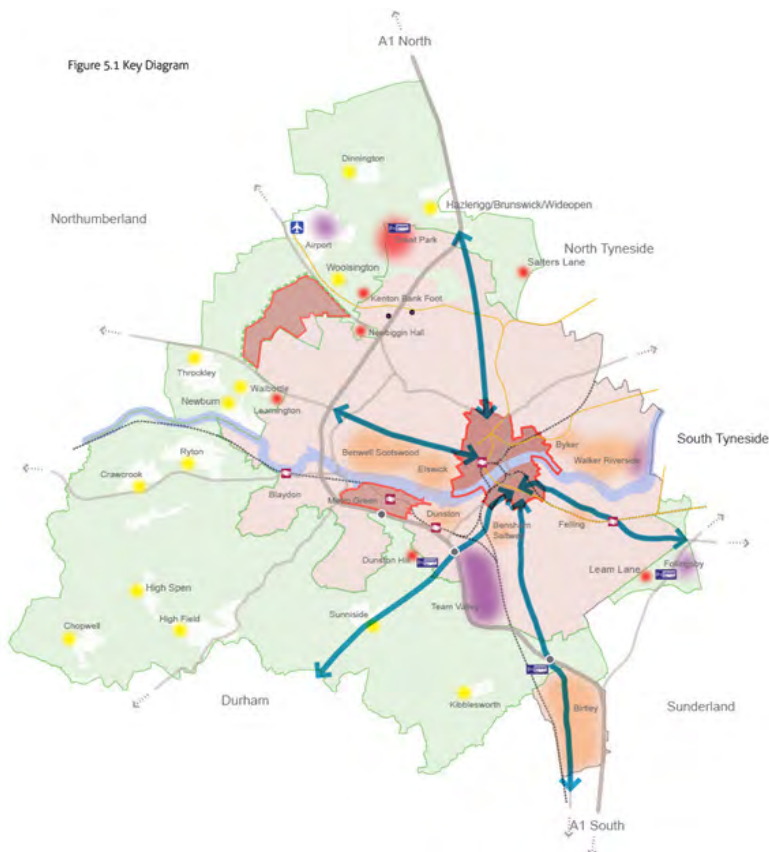
- 2.28 Once adopted, the Local Plan which will include the Core Strategy and Urban Core Plan will constitute the strategic Development Plan for Newcastle up to 2030. The

Plan's Strategic Objectives which relate to the ELR are:

- Increase our economic resilience and diversity, and ensure opportunities for the supply of suitable, flexible and diverse business accommodation to encourage and support higher levels of entrepreneurship, skills and business formation.
- Encourage population growth in order to underpin sustainable economic growth and maintain our economically active population.

2.29 Policy CS1 seeks to concentrate major employment related development in the Strategic Growth Area of the Urban Core, as it is the most sustainable location in Newcastle and Gateshead. It will be the priority location for major development, including office, retail, higher and further education, commercial leisure, culture and tourism, supported by the development of new urban living.

Figure 2: Draft Core Strategy Key Diagram



2.30 The emerging economy policies state that employment and economic growth will be concentrated within the Urban Core and four Key Employment Areas as follows:

- a For office, retail, research and further/higher education: the Urban Core;
- b For manufacturing and engineering, including renewables and environmental industries: Team Valley, Walker Riverside;
- c For distribution and logistics: Follingsby;
- d for office and industrial use: Newcastle International Airport.

- 2.31 Priorities for ensuring diversification and sustainable economic growth include:
- a Supporting our knowledge-based economy;
 - b Improving digital infrastructure delivery to businesses and residents;
 - c Supporting improvements to the quality, accessibility and attractiveness of our employment areas;
 - d Ensuring a range of premises for small, medium and large business. In particular the overall level of start-up and grow-on space should be maintained and where possible increased;
 - e Supporting diversification of the wider rural economy.
- 2.32 The economy policies also seeks to improve skills and access for local people to job opportunities, through targeted recruitment and training contributions by developers.
- 2.33 The City's emerging employment land portfolio is included in the Plan. It seeks to improve the diversity of employment opportunities, while protecting allocated employment sites for small, medium and large businesses. It confirms that economic regeneration will be focused within allocated employment areas and the urban core.
- 2.34 The Policy states that the allocated employment areas will be the focus for employment uses and a rolling 5 year land supply with a minimum reservoir of 9ha per annum will be maintained, mainly for warehousing and manufacturing. For office use, the Councils will ensure a range of sites, able to accommodate up to 512,000sq m of new office space, primarily in the Urban Core. To improve the diversity of employment opportunities, allocated employment sites for small, medium and large businesses will be protected. (Note: in redrafting the OCS these figures will be updated based on the findings of this study).

NewcastleGateshead Urban Core Area Action Plan (AAP): Draft Plan (September 2011)

- 2.35 The Urban Core AAP sets out the specific planning policies for the economic centre of Newcastle and Gateshead. The Core Objectives of the AAP with regard to the economy are: to promote economic performance by attracting new businesses and accommodating the expansion of existing employers; increase the Urban Core's leisure, retail and business visitor capacity; improve the Urban Core's retail offer; and contribute to a reduction in carbon dioxide emissions.
- 2.36 The AAP prioritises five large development opportunity sites as the main focus for office and business development but does not exclude other Urban Core locations for these uses.
- 2.37 The AAP defines the five Priority Sites for office and business development, where new large-scale office and business development will be promoted and concentrated as part of large mixed use schemes (development mix and office development quantum in brackets):
- Science Central/Gallowgate (Science and Research / premier office: 77,380

sqm / 10,000 sq m);

- Stephenson Quarter (premier office: 40,000 sq m);
- East Pilgrim Street (retail-led mixed use with B1 office element: 75,000 sq m);
- Gateshead Quays (premier office: 24,451 sq m);
- Baltic Business Quarter (premier office: 98,250 sq m).

2.38 Other significant office locations include Forth Yards and Ouseburn. The AAP also supports the development of clusters of Small and Medium Enterprises (SMEs) as part of mixed use schemes.

(Note: in redrafting the UCAAP these figures will be updated to reflect the findings of this study).

NewcastleGateshead Office Needs Study 2010

2.39 The study was commissioned to provide essential information and better understanding of the local office market, and an estimate of future demand, to assist in preparing Development Plan Documents, especially the Core Strategy and Urban Core Plan.

2.40 The study considered both supply, and demand, including market research amongst organisations and companies. Notable findings include: the importance attached both to car parking and good public transport links; a clear divide between demand for city centre and out-of-centre office park locations; and a strong market and availability of funding for speculative development, though currently benefiting from pre-lets due to high levels of demand. Newcastle is seen as a desirable address: out-of-centre locations are attractive to some extent due to free parking, but are also discounted by prospective occupiers due to lack of access to town centre facilities and public transport.

2.41 This update to the ELR has been undertaken in parallel with an update to the Office Needs Study and SHLAA so that land availability and suitability can be considered across the full range of land requirements. This approach is consistent with the NPPF, which states that reviews of land available for economic development should be undertaken at the same time as, or combined with, SHLAAs and should include a reappraisal of the suitability of previously allocated land.

NewcastleGateshead Long Term Employment and Demographic Projections, Report by Research Group (PRG)/ Durham Business School/St Chad's College

- Balance of Growth Between Newcastle and Gateshead

2.42 The report presents the outcome of work on long term employment and demographic (population) projections for Gateshead and Newcastle. Independent employment projections (obtained from Cambridge Econometrics), and demographic projections (provided by Office for National Statistics), for Newcastle, Gateshead and the North East covering the period 2010-2030 were assessed using a variety of analytical and modelling techniques. Each projection included a comparative analysis of historic and projected values and an analysis of the

underlying factors which cause values to change from one year to the next. Analysis suggested it was appropriate to make a small adjustment to the employment projections affecting the balance of growth between Newcastle and Gateshead. As a result, the additional employment growth of around 22,000 over the plan period jobs will be spilt in proportion to its current levels of employment, ie Gateshead is projected to receive an additional 7,000 jobs, while Newcastle receives 13,900 jobs.

- Labour Market Balance

- 2.43 Analysis of the projected labour market balance for 2030 indicates that the vast majority of the increase in the number of jobs, from around 299,000 in 2010 to around 321,000 thousands in 2030, will be taken up by workers resident in Newcastle or Gateshead.
- 2.44 The proportion of employment within Newcastle and Gateshead which is filled by residents from Newcastle or Gateshead is estimated to increase slightly between 2010 and 2030. This increase is largely a consequence of the estimated impact of changes to state pension age and school leaving age, coupled with an assumed increase in the employment rate (the proportion of economically active residents in employment) to a more 'normal' level of 94% by 2030. These factors are estimated to increase the projected employed population of Newcastle and Gateshead from around 210,000 in 2010 to around 238,000 in 2030.

Regeneration Strategies and Initiatives

- 2.45 This section, provides an analysis of economic policy documents relating to the future need for, and supply of, employment land. The following documents have been reviewed, with the key findings summarised below:
- North East Local Enterprise Partnership;
 - Low Carbon Enterprise Zones;
 - Newcastle 2030: Taking the City Forward;
 - The 1Plan: Economic Master Plan for NewcastleGateshead;
 - The NewcastleGateshead Accelerated Development Zone.

North East Local Enterprise Partnership

- 2.46 The North East Local Enterprise Partnership [NELEP] covers the local authority areas of County Durham, Gateshead, Newcastle upon Tyne, North Tyneside, Northumberland, South Tyneside and Sunderland. The area includes a population of 2 million, £32 billion economy and 43,000 businesses. It aims to ensure that the North East maximises its contribution to national economic growth and rebalancing the national economy and sustain the strong leadership and partnership working.
- 2.47 Further, the Local Enterprise Partnership aims to be instrumental in:
Promoting productivity, enterprise and business growth through developing innovation and exploiting research and development capabilities:
- Building on key economic strengths and developing the sectors that are strategic to the UK and are clustered in the North East such as low carbon vehicles, offshore wind, chemicals and process industries and a range of other

new industries;

- Supporting enterprise and Private Sector Business Growth, including dealing with enquiries for new investment from both existing businesses and inward investors.

2.48 Bidding for and programme managing funding.

- Providing strategic input and projects into other key areas linked to economic growth such as integrated transport, infrastructure, connectivity and energy investment.

2.49 The NELEP's current work programme includes the following projects:

- Administrating the Growing Place Fund and Regional Growth Fund.

2.50 The Growing Place Fund provides £17 million revolving pot to generate economic activity in the short term by addressing immediate infrastructure and site constraints and promote the delivery of jobs and housing.

2.51 The Regional Growth Fund aims to help those areas and communities which were dependent on the public sector to make the transition to sustainable private sector-led growth and prosperity.

NELEP Low Carbon Enterprise Zone

2.52 The Northern Eastern LEP area's Low Carbon Enterprise Zone was agreed in August 2011. It is hoped to generate 7,000 net additional jobs in the next 10 years focusing on quality jobs and supporting infrastructure. They become operational from April 2012, supported by a new marketing strategy. The Phase 1 includes 117ha focused on capturing the benefits of low carbon economy:

- Ultra Low Carbon Vehicle sites comprise of 42ha adjacent to the A19 in Sunderland. Four of the five sites are located within the Nissan compound. This physical proximity means it is likely that these sites will be developed for uses, which specifically relate to the automotive/electric vehicles or battery technologies. Turbine Business Park to the south of Nissan is owned by Barmston Developments. Planning permissions exists for a mixed use development with potential to accommodate low carbon and advanced manufacturing industries.
- Offshore Wind and Renewables (River Tyne North Bank), including Swan Hunter in North Tyneside, Neptune Yard in Newcastle and the Port of Tyne North Estate. The Port of Tyne site provides port facilities with potential to accommodate marine engineering (including offshore wind) or maritime related uses. The Neptune Site and Swan Hunter site provide quayside sites with potential to accommodate sub-sea and offshore wind sectors.

2.53 Phase 2 includes Blyth Renewable Energy Zone, Port of Sunderland and Hawthorne Business Park A19 County Durham.

The NELEP EZ will take advantage of the Government incentives: business rate discount and enhanced capital allowances for plant and machinery, Local

Development Orders (Draft LDOs are expected to go out to consultation from Spring 2012), superfast broadband, capital allowances for plant and machinery, and UKTI support for inward investment or trade opportunities. Figure 3 shows the NELEP Low Carbon Enterprise Zone area.

Figure 3: NELEP Low Carbon Enterprise Zone



1Plan (June 2010)

- 2.54 In late 2011 1NG, the city development company for Newcastle and Gateshead closed. The functions of 1NG are to be carried out internally by Newcastle and Gateshead councils. The 1Plan, produced by 1NG in 2010 remains the Economic Masterplan for Newcastle and Gateshead. Given the ongoing lack of confidence in the economic climate, there is some uncertainty regarding the timescales and scale of development involved in the schemes identified in the 1Plan. However, the principles and objectives which underpin the strategy remain valid.
- 2.55 The 1Plan is the first economic and spatial strategy for Newcastle and Gateshead, its evidence draws heavily on the OECD, Territorial Review: Newcastle Report (2006). It presents the challenges and opportunities facing the city and it maps out a strategy based on 3 key elements: 4 Big Moves which establish the key themes – economy, people, place and sustainability; 10 key steps – practical actions; a placemaking strategy to promote sustainable urbanism and transformation of the urban core. It includes creating a network of knowledge hubs where teaching,

research, specialist services and businesses come together; focusing on Central Business District through the regeneration of Gateshead Quays and East Pilgrim Street as mixed use quarters; and utilising the north bank of Tyne to lead low carbon economy linked with marine and energy sectors.

The NewcastleGateshead Accelerated Development Zone

- 2.56 The North East has made a long journey, from being a centre of the industrial economy in the 19th and early 20th century, through a radical transition, to the new and diverse economy of today. Striking this City Deal with Government will ignite the next phase of economic growth, contributing to the North East LEP's four main economic priorities of:
- Supporting Enterprise and Private Sector Business Growth
 - Building on Key Economic Strengths
 - Improving Skills and Performance
 - Strengthening Transport, Connectivity and Infrastructure
- 2.57 Newcastle provides a major contribution to the productivity and competitiveness of the UK economy and is a significant driver of economic growth across the wider LEP area. It provides employment to almost 200,000 people; over half are commuters from the wider LEP area. It generates a quarter of the LEP area's GVA. Newcastle is home to; two major universities; one of the country's largest financial and business service centres; a responsive education sector including major colleges and private sector training providers; and the UK's best hub of green technology services. Before the recent recession, Newcastle's economy performed well, with private sector employment growing more quickly than in any other major English city outside London.
- 2.58 Despite the recession, there is strong evidence of market confidence and investment:
- commitment from Virgin Money to locate its operational headquarters in Newcastle;
 - private sector investments totalling over £100m in the marine and offshore sector;
 - a major retail extension to Eldon Square completed in 2010, completely pre-let;
 - retailers choosing to keep their shops open later into the evening as part of Newcastle's 'Alive After 5' initiative, with footfall increasing 15% over the past four years.
- 2.59 Employment growth, combined with a stalled property pipeline, has led to the lowest property vacancy rate of any core city, with almost no new Grade A space now available. However, there is the potential for this to act as a brake on the economic recovery.
- 2.60 With unique green assets, low carbon sector strengths and pioneering research activities stimulated by world class universities, Newcastle represents a compelling location for knowledge-based, private-sector-led growth. This will supplement

existing recognition as the most Sustainable City in the UK. The North East LEP has established a Low Carbon Enterprise Zone for the marine & offshore wind sector and ultra low carbon vehicles, and Newcastle University is developing geothermal heat sources in the City.

- 2.61 The North East is the only English region with a balance of trade surplus. We are committed to continuing to support our businesses as they seek to exploit global market opportunities, increase international trade and improve regional business competitiveness. Newcastle International Airport is a key asset for the entire North East for freight and business travellers. Improving connectivity into Newcastle is also essential, ensuring that employment opportunities can be accessed by the widest possible labour force, as is improving broadband infrastructure.
- 2.62 The city faces a number of economic and social challenges. The labour market continues to endure the legacy of inter-generational unemployment, a disproportionate number of young people not in education, employment or training (NEET), and a workforce which does not meet all the needs of the business community.
- 2.63 Newcastle and Gateshead have agreed:
- to create a NewcastleGateshead Accelerated Development Zone (ADZ), unlocking city centre growth;
 - that Newcastle and Gateshead should benefit from new Tax Increment Financing powers, with all growth in business rate income generated within the four key development sites, covering 80 hectares, ring fenced by government and retained by the two Councils for 25 years; and
 - that, backed by the revenue streams created by localised business rates, Newcastle and Gateshead Councils will immediately initiate a £92 million investment programme, creating 600 construction jobs and leading to 1,500 permanent jobs within five years, and 13,000 over the next 25 years.
- 2.64 The aim of the NewcastleGateshead ADZ is to unlock growth across the urban core, returning the area to its pre-recession economic trajectory, which had seen more rapid employment growth in Newcastle than any of the other core cities. The ADZ is aligned with our economic strategy, which concludes that to reach our full economic potential we must grow the knowledge economy, develop and retain a skilled workforce, promote regeneration that is sustainable and stimulate growth in the urban core of Newcastle and Gateshead where we are at our most competitive.
- 2.65 The ADZ covers three of the city's key sites which offer significant growth potential over the next 25 years, where we can accelerate growth in the short and medium term:
- Science Central, offering opportunities for businesses to co-locate with Newcastle University.
 - Stephenson Quarter and Central Station area, primed to become a major new office district in the next decade.

- East Pilgrim Street, an under-utilised area adjacent to the city centre’s main business and retail district, set to become a substantial mixed-use development.
- 2.66 These sites currently face a number of obstacles which inhibit development: viability gaps, constraints in public and private sector finance and the requirement for significant up-front enabling infrastructure investment – including site preparation, demolitions, energy and utilities infrastructure, and highways improvements.
- 2.67 A coherent programme of infrastructure investment – to be financed through Tax Incremental Finance (TIF) – has been identified totalling £92m. This will lever in £800m of private sector investment and unlock significant development. It is expected to generate incremental annual business rates of up to £21m (and £320m in total) by 2038, enabling borrowing to be paid back by 2031.
- 2.68 The ADZ is forecast to generate 13,000 jobs, or 11,000 net of displacement and deadweight. Significant jobs growth is necessary if we are to reduce the 50,000 people currently receiving out-of-work benefits across Newcastle and Gateshead. We believe that the accelerated development and additional construction activity should also bring substantial benefits to HM Treasury, by bringing forward additional tax revenues and reduced benefit costs, assisting Government’s deficit reduction programme.
- 2.69 The ADZ will be overseen by the Gateshead and Newcastle Partnership, which will be strengthened to provide greater transparency and accountability.
- 2.70 A copy of Newcastle City Deal, September 2012 is attached as Appendix R.

Local Historic Evidence

- 2.71 This section provides a summary of historic studies which provide useful information to support this Employment Land Review. The following documents have been reviewed, with the key findings summarised below:
- Spatial Analysis of Economic Flows in North East England
 - North Tyneside / Newcastle City Council / One North East: River Tyne North Bank Regeneration Strategy
 - River Tyne North Bank Strategic Development Framework Plan Report
 - OECD Territorial Review of Newcastle
 - Walker Riverside Supply & Demand Study, Gerald Eve for Newcastle City Council
 - The Role and Relevance of the Newcastle City Centre
 - Discovery Quarter Report, Colin Buchanan 2005+

Spatial Analysis of Economic Flows in North East England, NERIP, 2006

- 2.72 This study was published by North East Regional Information Partnership (NERIP), which supports the Regional Spatial Strategy. It aims to illustrate how different parts of North East England connect with each other, and considers movement

patterns for travel to work shopping and leisure, with particular regard to the City Region concept.

- 2.73 The study notes that Tyne and Wear is the regional economic engine, and has a high level of inward commuting, mainly from the north and west. The Tyne is a substantial barrier for a number of trip purposes, including work, shopping and leisure.
- 2.74 The Tyne and Wear City Region sphere of influence, primarily influenced by travel to work, extends to most of the North East Region, except the far north of Northumberland, ie Berwick, and south west ie Durham.

North Tyneside / Newcastle City Council / One North East: River Tyne North Bank Regeneration Strategy, White Young Green, 2006/2007

- 2.75 The study, jointly funded by One North East and the two local authorities, covers the regeneration potential for the historic shipbuilding and industrial north bank of the Tyne from Walker Riverside to North Shields in North Tyneside. The Scoping Study by consultants White Young Green was published in 2006, and this has been followed up by reports to North Tyneside Cabinet and Newcastle Executive, the most recent being a North Tyneside report of November 2007.
- 2.76 The general thrust at Walker Riverside is to retain and expand the established marine and sub-sea industries, and this indicates that this will be a major industrial component of the Local Plan employment land supply. Amongst the main findings in these reports are the following:
- market demand analysis has demonstrated that there are substantial opportunities for attracting marine related employment;
 - companies within the sub-sea technology and renewable energy sectors from this area, and a number of these, including Wellstream and Duco in Newcastle, are looking to expand;
 - the study sees a real opportunity to promote a 'Marine Industries Cluster/Centre' on the River Tyne North Bank to build on the European pre-eminence in subsea, fabrication, marine design and naval architecture. It is considered that this could become a leading European integrated marine industrial estate with deepwater facilities, multi-user load out and fabrication facilities and high-wide load access;
 - significant marine infrastructure along the River Tyne North Bank should be dedicated to these growth sectors and inappropriate riverfront uses encouraged to locate elsewhere;
 - the challenge for the public sector is to manage the process of change, and ensure that the continued supply of adequate sites is provided for and guide the growth of the new marine technologies;
 - immediate next steps including commissioning detailed technical reports to identify the condition and extent of riverfront infrastructure (berths, water depth, hardstanding, cranes, dry docks etc), utility capacities, ground condition and contamination, site load capacities, movement strategy etc. The consultants

also propose the preparation of a global marketing strategy in consultation with key stakeholders. How these are progressed will be part of further discussions with North Tyneside and One North East; and

- the City Council has freehold interest in most of the industrial area and with its planning powers has significant control over developed and vacant sites. Much of the site investigation work has also been carried out on the vacant sites in the industrial area.

River Tyne North Bank Strategic Development Framework Plan Report, GVA Grimley, 2009

- 2.77 The study, commissioned by North Tyneside Council, Newcastle City Council, One North East and the Homes and Community Agency, covers the regeneration activity of the North Bank for the next 15 to 20 years.

OECD Territorial Review of Newcastle, C.U.R.D.S, 2006

- 2.78 In 2006, the OECD prepared a Territorial Review of the 'Newcastle City Region'. The Territorial Review found that whilst NG (and the wider Tyne and Wear city region) were displaying signs of both a growing economy and population, growth rates still lagged those of the UK as a whole. It argued that the City region had only achieved partial success in shifting towards knowledge based economy and still retained a strong dependence on public sector employment and manufacturing.
- 2.79 While the review quoted some diversification into high value added manufacturing in areas such as the offshore industry, pharmaceuticals and biotechnology and automotive assembly this was not as extensive as in other parts of the UK, for example the North West. The report also argued that the City Region's economic output is constrained by a lack of skills and investment within the existing workforce and stubbornly high levels of worklessness.
- 2.80 OECD present the City Region as a "medium sized metropolitan area" and as such quote it as facing greater challenges in exploiting agglomeration – the labour pool is smaller and less skilled, the sectoral base both less diverse and less specialised and the rate of innovation lower than in competing City Regions. This, they argue – a point reinforced in the SEC research – highlights the need for the City Region to develop an economic strategy that is both differentiated and relatively narrowly focused.
- 2.81 However, despite these challenges OECD also reports a number of untapped assets including:
- the region's strength in Higher Education and University based R&D and the potential if business collaboration and graduate retention could be increased;
 - the rich natural and cultural amenities which provide a base for attracting mobile businesses and people; and
 - good connectivity in terms of national and international transport links and ICT infrastructure.

Walker Riverside Supply & Demand Study, Gerald Eve for Newcastle City Council, March 2003

- 2.82 Businesses are confident about the predicted growth in marine engineering on Tyneside. Supply chain companies are optimistic about the prospects for their market and this will have a knock-on effect on demand for industrial property. 48% of the sample survey expected to expand or relocate within the next 3 years, translating into over 500,000 sq ft of demand.
- 2.83 The top location criteria of occupiers considering relocating were accessibility, cost of occupation, proximity to a skilled workforce and the availability of financial assistance. Walker Riverside scores highly on all counts. Occupiers require mainly modern factories and workshops. 38% wanted units of over 30,000 sq ft, and 33% less than 5,000 sq ft. There was also fairly strong demand for office accommodation. The need for a river frontage did not come across, although the quay facility is a unique selling point.
- 2.84 Competition exists within the North East for the same potential occupier demand, eg the ports of Teesside and Blyth, and a number of sites on the North and South Tyneside river corridors. Remaining sites in these areas are either too small or too long-term to compete with Walker Riverside.
- 2.85 Of the six sites identified for future development three are already under the control of Newcastle City Council: Wincomblee Road to the south of Wellstream; Neptune Yards; Wincomblee Workshops. The Council has to consider being prepared for what could be a very sharp uplift in business activity within the next two years. Neptune Yard has been packaged for a single user and is coming forward as an Offshore Renewable Park.
- 2.86 There is potentially demand for office accommodation targeted at the marine and offshore sectors and a full feasibility cost should be prepared.
- 2.87 Skill levels are high in relation to current needs, but there is a need for additional training programmes to meet the expected upturn in activity following two decades of little investment in training. A bespoke training centre targeting the marine engineering, offshore and renewables sectors would be timely.
- 2.88 This study has been followed up by the work on the sub-regional River Tyne North Bank Regeneration Strategy, outlined above.

The Role and Relevance of the Newcastle City Centre, DEMOS 2004

- 2.89 The report is not a planning study, but advises the City Council on the wider social, cultural and economic potential of the City Centre. It is based on research and conversations with city leaders, and is particularly relevant to the question of local distinctiveness. It focuses on quality of life, quality of place, and quality of opportunity.
- 2.90 In respect of the economy, it states that:
- like many post-industrial cities in the UK, Newcastle contends with the reality of what has been described as a two-speed or two-tier economy. As

the service sector and culture and leisure industries power ahead it appears that the benefits of this growth are not being felt equally across the City, particularly among the former industrial workforce which now finds itself unskilled for the needs of the new economy. Over the last twenty years, when 50 per cent of the workforce was employed in the four heavy industries of shipbuilding, mining, steel and engineering, Newcastle has undergone immense economic change;

- at the same time Newcastle ranks 34th in the UK cities competitiveness index, which is based on indicators of business density, knowledge intensive services, economic activity rates, productivity, GDP/capita, unemployment and average earnings. Additionally, the business base in the Tyne and Wear remains weak. Currently there are 179 businesses for every 10,000 adults, compared to an UK average of 351. Within Newcastle, the business sector may continue to contract - over the period 1994-2000 the decline in the business base was 16.5 per cent;
- yet at the same time there were signs of significant gains being made in the new economy with employment in the culture and leisure industries running at 21 per cent compared to 19 per cent nationally. Meanwhile figures from One North East revealed that the region has witnessed the second highest number of hi-tech business start-ups in the country; and
- all cities need centres and all regions need cities with strong centre to act as an economic hub and engine for growth. In Newcastle it is clear from existing data that the city centre is the driver for growth in what remains an under-performing region in contrast to the rest of the UK. At the time of the study 70,000 people lived and worked in the centre. There was 2.7m sq ft of retail space, 3,159 businesses with 50,044 registered employees, a student population of 40,000 based at Newcastle and Northumbria Universities, 105 restaurants, 181 licensed premises and 1,261 bed spaces.

2.91 The report's recommendations included the following:

- the Council should commission an economic study specifically to investigate the economic multiplier effects and benefits of the City Centre to the region;
- an audit of Council owned land in the city centre, including the complex attendant lease structures, should be undertaken to identify what land can be earmarked for affordable development, for example for incubator businesses or independent retailers;
- the Council and partner agencies should formulate a strategy for attracting more knowledge workers – and hence KIBs and SMEs - to the region. This would include a shift of focus from attracting companies to attracting talented entrepreneurs and professionals with job-creating capacity to the city;
- the Council should work with partner agencies, in particular Nexus, to address issues of transport exclusion to the city centre;
- ensure that the growing co-operation between the Council and the Universities continues and strengthens;

- consider the creation of a multi-agency team within the Council itself including representatives on secondment from the Universities, working alongside Council officials; and
- the existing collaboration between the Council and the Universities for a new city centre-campus masterplan should focus on the physical integration of the Universities into the City so they are no longer perceived as a City within a City.

Discovery Quarter Report, Colin Buchanan & Partners 2005

2.92 The Discovery Quarter is a defined sub-area within the emerging Core Strategy and Urban Core Plan. Amongst other things, the report drew on previous studies within the defined area: West Central Area Development Options Study 1999; Gallowgate Masterplan 1999; Newcastle Central Station Development Options Study 2000; and the Elswick Wharf Area Accessibility Study 2001. The brief for the Study was to:

- develop a strategy establishing general principles of land use and development;
- appraise the contribution of key sites and potential development to that strategy;
- identify and prioritise actions/interventions to realise the strategy;
- set out delivery programme/mechanisms and provide a business case for future funding bids; and
- develop for Gallowgate and Brewery Site a more detailed urban design & transportation framework.

2.93 The Market Appraisal in respect of offices found that:

- there is a shortage of new floor space in the City Centre which, combined with strong demand, has led to an imbalance in the market (particularly in relation to Grade A accommodation);
- future growth is being directed towards St James' Boulevard (the Citygate and St. James' Gate developments at either end have both been successful). Gallowgate is being recognised as an increasingly important office location by city professionals and has recently attracted a number of high profile occupiers; and
- the city's inability to meet office occupier demand has resulted in the promotion of out-of-town business parks. Although limited in number they are successful.

2.94 The recommendations in respect of sustaining the office market included the following:

- the area has the potential to accommodate more than 250,000 sq m of office floorspace - probably 10 years supply – creating almost 9,000 new jobs;

- the phasing of development programmes by developers should provide stability to the Newcastle central office market;
- the City Centre Grade A accommodation that Discovery Quarter Brewery and Gallowgate can provide is a unique market – it offers a unique product that business parks cannot;
- occupiers will predominantly be a mixture of indigenous relocation and growth with an element of inward investment. The expansion and growth of the professional/corporate sector within Newcastle has been significant in recent years and is likely to continue to grow - they will have a particular City Centre Grade A requirement; and
- the regeneration of the Discovery Quarter will take 10-15 years to complete, based on current levels of market demand. The strategy identifies the potential to achieve the following development outputs over this period: Office - 250,000 sq m Light Industrial - 25,000 sq m.

2.95 In respect of the industrial parts of the Quarter, ie George Street and Scotswood Road, it stated:

- there is a limited industrial market within this area due to the potential of realising higher land values for other uses;
- the industrial and trade counter operations at the western end of the study area around Brunel and Penn Street are lively and vibrant; and
- many of the industrial uses currently based within the area located there for historical reasons.

2.96 The Study also considered expansion of the knowledge economy, mainly on the basis of the International Centre for Life. It pre-dated establishment of the Science Central research/high tech Use Class B1b) concept at the Newcastle Brewery site, which it envisaged as a commercial office location. In this respect the study has been overtaken by events, and the commercial (Class B1a) content of the area needs to be reviewed.

Conclusion

2.97 There is an array of policy to guide the future locations for employment land and policy documents which set out our ambitions and how we will earn our living over the coming years. However, much of this was written by the previous government and prior to our current economic crisis. Given the uncertain world in which this ELR was written we are committed to keeping it under review and updating as necessary. For now at least the future decisions on the composition of our employment land to 2030 is based on the evidence/policy commitments set out above.

3. Economic Context & Prognosis

Summary

Newcastle is widely recognised as the regional centre of the North East. After the decline of the industrial base in the 1980s and 1990s, upon which Newcastle's economy historically depended, there was a marked revival of the local economy. The City has a higher proportion of employment in banking, finance and insurance sectors than both the national and regional average.

Newcastle has a higher than average representation of jobs in Public Administration, reflecting the fact that the area is the administrative centre for Tyne & Wear.

Despite modern office floorspace having been developed in out-of-town locations over the last decade, the Urban Core is still Newcastle's main office location.

Newcastle is relatively highly skilled with 28.0% of residents achieving NVQ4 and above, which is higher than the North East average of 25.5%, but slightly below the national average of 31.3%.

Despite, above average business registrations in Newcastle, the number of de-registrations has overtaken the number of registrations indicating that business survival rates are low.

Newcastle plays an important role as a regional centre for other nearby Districts, attracting 88,700 in-commuters. (Census 2001)

Unemployment is higher than the national average, with low levels of economic activity and self-employment. The decline of traditional industries has resulted in a more diverse employment base. Employment land policy is a critical tool in enabling the development of high-quality business locations (whether office or industrial).

The current competitive advantages of Newcastle, which could help shape its future economic role have been identified as:

- excellent national / international transport accessibility as a result of Newcastle's proximity to the strategic road network, the East Coast Mainline and Newcastle International Airport which is locally supported by an excellent Metro system;
- the local business base has experienced strong growth in recent years;
- total employment in the City has experienced strong growth in recent years, driven by significant increases in banking, finance & insurance, construction and public administration;
- the City contains major concentrations of economic activity in established, successful locations such as the Urban Core; and

- Newcastle is located in close proximity to a number of excellent higher and further education institutions, which provide the opportunity for the business base to capitalise upon their research specialisms and source graduate labour.

The weaknesses of and potential threats to the local economy include:

- a current over representation of employment in Public Administration;
- the City's business base contains a low proportion of firms operating in knowledge-based industries;
- the City has lower than average highly skilled workers in comparison with the national figures and relatively poor levels of educational attainment;
- levels of deprivation are high, with particular concentrations in Cowgate, Walker, Benwell and Scotswood; and
- the City faces competition from North Tyneside, particularly with respect to the out-of-centre office market.

Introduction

- 3.1 In this section we analyse Newcastle's local economy looking at areas which employment land policy could influence. The workplace economy is examined, the businesses and the jobs located in the City – highlighting the sectors Newcastle specialise in and how its employment profile has changed. The economic profile of City residents is considered, focusing on their skills and economic well-being. The balance of jobs and workers and their travel-to-work patterns are discussed. This analysis is important in identifying the existing strengths and weaknesses of the City's economy, as well as those factors likely to influence the nature and level of future demand for employment land.

Figure 4: North East of England



The Workplace Economy

- 3.2 Recent trends in the City are summarised below. These allow the City's economy to be compared with that of Tyne and Wear, the North East region and Great Britain as a whole.
- 3.3 Following a tentative recovery from what was arguably the worst recession since records began, 2011 was a year of weak economic growth and continuing economic uncertainty, especially in the Eurozone where the sovereign debt crisis has had a significant impact and affected global business confidence.
- 3.4 This, combined with austerity measures, has hit the North East Local Enterprise Partnership (NELEP) economic area hard. For example, unemployment in Newcastle (especially youth employment) has been rising and claimant levels for Job Seekers Allowance (JSA) has now surpassed levels last seen at the height of the recession (5.6% of all residents aged 16-24 as of May 2012).

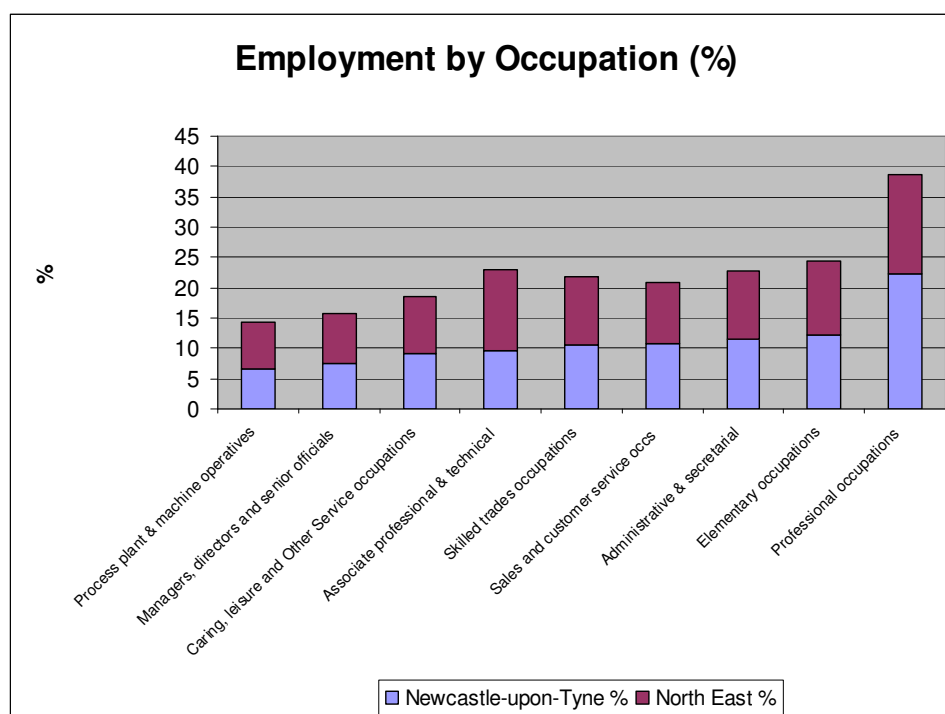
Industrial Structure

3.5 According to latest 'Employee Jobs' data available from the Office National Statistics (2008), there are approximately 175,700¹ jobs in Newcastle. During 1998 – 2008, the number of employees jobs in the City grew 17.45% from 149,000 to 175,000 exceeding the national average of 9.2%.

Figure 5 illustrates the balance of sector activity in Newcastle. It shows that:

- manufacturing has declined compared with both the rest of the North East and England as a whole (5.2% of jobs compared with 10.2% nationally and 12% regionally);
- of particular note for the office economy and office demand, the 'Financial and Business Services' (F&BS) accounted for 23.4% of jobs, above both the national average of 22.0% and the regional average of 16.6%;
- Newcastle has an over-representation of jobs in Public Administration, reflecting the fact that the area is the administrative centre for Tyne & Wear. 37.5% of Newcastle's jobs are in public administration, education and health, above both the regional average of 32.2% and the national average of 27.0%; and
- Newcastle has a below average proportion of jobs in construction (2.9%) to the North East (5.6%) and nationally (4.8%).

Figure 5: Employee Jobs by Industry 2008



Source: Nomis (www.nomisweb.co.uk) – Annual Business Inquiry

¹ This does not include the self employed.

Office, Industry and Warehousing

- 3.6 Employment land covers B1, B2, and B8 uses, which are often referred to as business or B-space jobs ie jobs in office, industrial and warehousing sectors. In assessing sectoral employment, a range of economic sectors have been examined based on the Standard Industrial Classifications (SIC '03) shown in Appendix K.
- 3.7 Broadly, the analysis assumes that offices (which include R&D) are occupied by Financial and Business Services, a sub-section of Public Administration, and Publishing. Industrial space is occupied by businesses in manufacturing, sewage and refuse disposal, some parts of construction, and motor repairs and maintenance. Warehousing is occupied by a variety of transport and distribution activities.
- 3.8 Newcastle has a higher proportion of offices compared with the national average, and the North East average. There are proportionally less jobs in industry and warehousing compared with the North East and England.

'Knowledge-based industries' (KBI) that tend to be higher value, and the extent to which they have been developed or developing in area can be an indication of current and future prosperity. Around 21.8% of jobs in the United Kingdom are in such sectors, compared with just 16.9% in the North East. At 22.2%, Newcastle has a higher concentration of these jobs both regionally and nationally, reflecting the scale of employment in the Finance, Banking and Business Services.

Figure 6: Knowledge Based Industries in Newcastle

Borough	2010 (%)
Newcastle	22.0
North East	16.9
Great Britain	21.8
Gateshead	15.0
North Tyneside	17.8
South Tyneside	15.2
Sunderland	15.4

Source: UK Competitiveness Index 2010

Employment Change

- 3.9 The ONS jobs density (2010) illustrates that there are 0.91 jobs to the working age population.

3.10

VAT Registered Business

- 3.11 The latest figures indicating the number of businesses, together with the percentage of registrations and de-registrations in Newcastle in 2007 is shown in Figure 7 below.

Figure 7: VAT Registered Businesses within Newcastle (2007)

	Newcastle	North East	Great Britain
Registrations	11.5%	11.1%	10.2%
Deregistrations	8.0%	7.1%	7.3%
Stock (at end of year)	5,840		

Source: BERR - vat registrations/deregistrations by industry

- 3.12 As can be seen in Figure 7 above, the number of registered businesses in Newcastle is above the national average (10.2%), and regional average (11.1%). However, the number of deregistered businesses in Newcastle (8%) is above national (7.3%) and regional (7.1%) averages too, suggesting business survival rates are poor.

Newcastles People

Population

- 3.13 In 2010, the resident population of Newcastle was estimated at 292,200 up from 274,500 in 1998. This represents marginal growth of 0.9%. To put it in context, the nearest centres in size to Newcastle are Nottingham and Southampton.

Economic Activity

- 3.14 Newcastle (68.2%) and the North East (72.6%) have lower economic activity rates than the Great Britain average (76.1%).
- 3.15 The City has more residents in self – employment (8.1%) compared with the North East (6.2%) but less than the Great Britain average (9.1%).
- 3.16 In line with the current national position and in response to the economic downturn, Newcastle and the North East are characterised by higher rates of unemployment, at 10% and 10.4% respectively compared with the Great Britain average of 7.9% (see Appendix L). In March 2010, 4.8% of the working age population were claiming Job Seekers Allowance (JSA), this is below North East levels (5.5%) but above the Great Britain average (3.9%).
- 3.17 March 2010 data illustrates that there were 6.1 claimant unemployed workers for every job centre vacancy in the City. This is broadly in line with the Great Britain average (6.4) and below the North East average (8.1). Appendix L identifies Employment Growth 2010 – 2038.

Qualifications

- 3.18 As can be seen in Figure 5 below, Newcastle has slightly fewer employees with the highest levels of qualifications: 27.3% have NVQ 4 and above compared to the 29.0% Great Britain average.

Figure 8: Qualifications (December 2011)

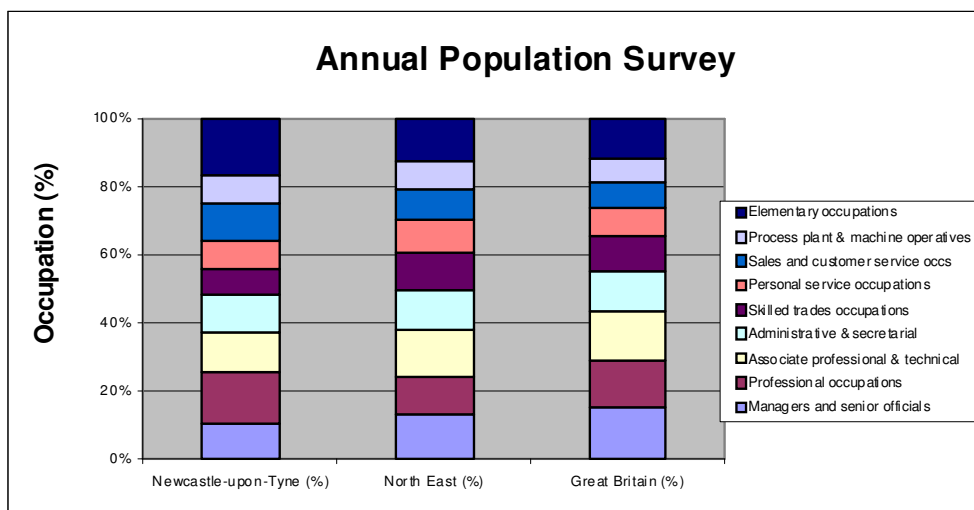
Qualification	Newcastle upon Tyne (%)	North East (%)	Great Britain (%)
NVQ4 and above	28.0%	25.5%	31.3%
NVQ3 and above	51.0%	47.9%	51.0%
NVQ2 and above	66.8%	66.1%	67.3%
NVQ1 and above	77.8%	80.3%	80.2%
Other qualifications	12.5%	6.7%	8.5%
No qualifications	13.3%	13.0%	11.3%

Source: Nomis (www.nomisweb.co.uk) - Annual Population Survey

Occupation Profile

- 3.19 Compared with the North East, Newcastle has a lower proportion of its residents working in Managerial, Professional and Technical occupations (38.7% compared with 37.4% regionally and 43.3% nationally). However, it has higher proportion of residents in Sales and Customer Service occupations (11.4% compared to 10.1% in the North East and 7.5% in the United Kingdom). There are higher proportions of residents employed in Elementary occupations (13.0%) compared with the North East and the United Kingdom (12.0% and 11.0% respectively).
- 3.20 At £441.00, the average weekly earnings of Newcastle’s residents are slightly below the regional average of £450.90 and well below the national average of £503.10.
- 3.21 Newcastle suffers from relatively high levels of deprivation, being ranked by the English Indices of Deprivation as the 40th most deprived of the 354 English local authorities.

Figure 9: Occupation Profile 2012

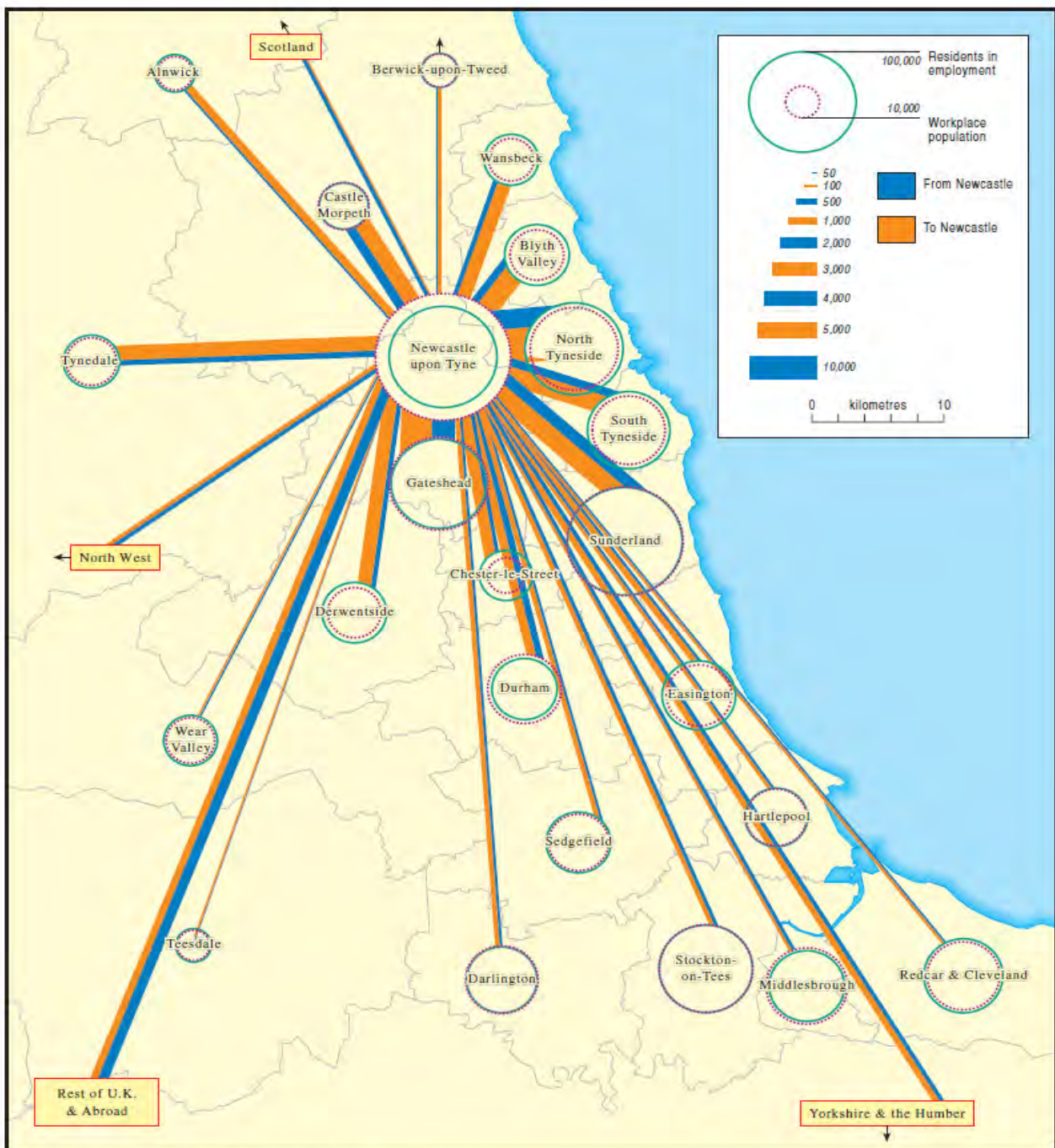


Source: Nomis (www.nomisweb.co.uk) - Annual Population Survey

Travel to Work

- 3.22 This analysis is based on the 2001 Census, this is still the most recent travel to work data.
- 3.23 Newcastle has a workplace population of 158,700, with 88,700 in commuters and just 31,500 out-commuters. This shows the relative pull of Newcastle as a regional centre of employment. Newcastle's employment influence covers a much larger geographical area than the rest of the North East with 62% of its workforce travelling less than 10km to work.

Figure 10: Commuting flows to and from Newcastle.



Source: 2001 Census Special Workplace Statistics ONS

Future Potential

- 3.24 In order to identify the economic potential of Newcastle, it is important to consider what industrial sectors are best placed to drive future growth. This is informed by an understanding of which sectors are under or over-represented in terms of their local employment and their recent growth potential.
- 3.25 Locational quotients measure whether an area has a particular specialism in an industry or trade, and are calculated by dividing the proportion of employees in the sector and the benchmark area (in the case of the North East).
- 3.26 Figure 11 assesses the City's current sectoral strengths through the use of location quotients, which measure the concentration of employment in an industry at the local authority level relative to the regional average.

Figure 11: Locational Quotient Analysis

Sector	Employees, 2010	Change, 05 – 10	LQ
Primary and Secondary	1,200	1100.00%	0.49
Manufacturing	10,300	-15.57%	0.48
Utilities	700	-36.36%	0.45
Construction	8,600	0.00%	0.56
Retail, Distribution and Transport	48,600	-15.18%	0.90
Business and Financial Services	47,300	8.24%	1.48
Public Services	75,800	0.53%	1.15
Total	192,400		

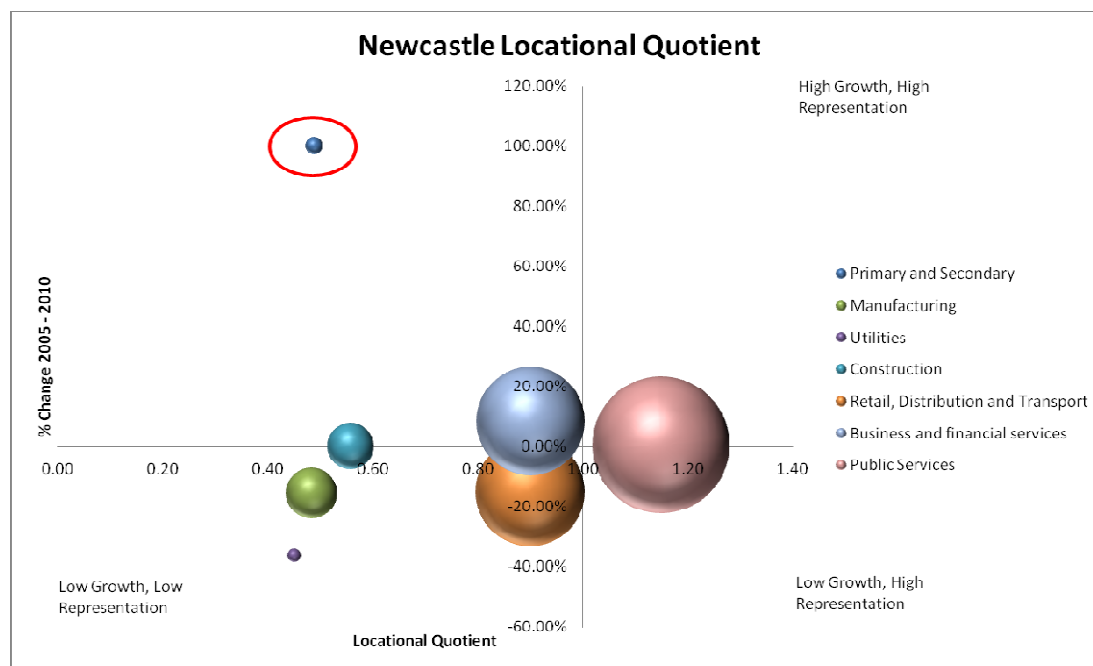
Source: DTZ analysis based on 2010 BRES data

- 3.27 The table shows that no sector has a location quotient above 2.1, indicating that Newcastle does not have an overwhelming over-representation in any particular sector. It can, however be seen that Newcastle has a modest over-representation in a varied range of sectors. This includes high value sectors such as banking, finance and insurance and public administration, education and health. The over-representation of these sectors is an indication that the Newcastle is the regional capital of Tyne and Wear offering some competitive advantage to these sectors that enables them to flourish within the City.
- 3.28 Newcastle has an under representation when compared with the regional average in a number of manufacturing and distribution services. This indicates that within the regional context, the City has successfully made the transition from an industrial based economy to a service based economy. The red circle around Primary and Secondary, (see figure 12) reflects an altered % growth for analysis purposes from 1100% to 100%.
- 3.29 Figure 12 shows the relative representation of sectors in Newcastle as well as levels of employment over the period 2005 – 2010. Additionally, the relative size of the 'bubble' for each sector represents the level of absolute employment within Newcastle.
- 3.30 It is also important to understand the direction of employment change. The top-right quadrant of the table is of the most importance in suggesting those sectors

likely to drive future economic growth. It contains sections which have a high representation and have experienced positive growth. For Newcastle, this quadrant includes public administration.

- 3.31 The top left quadrant contains those sectors that are under-represented relative to the regional average but have exhibited recent positive growth. These sectors, which include primary and secondary industries also offer opportunities for growth.
- 3.32 In broad terms, the above analysis would suggest that the City has a strong service base.

Figure 12: Locational Quotient



Source: DTZ analysis based on ABI data

Sectors with Growth Potential

- 3.33 A number of sectors, deemed to be important to the local economy, have had their growth potential examined. Sectors have been deemed important because of factors such as their economic output, the number of people they employ, the profile they have themselves and how they contribute to the City's image and reputation and, finally, their growth potential. The analysis draws upon the findings of research undertaken by SEEDA² which examined the key drivers of business location by sector. Although it is acknowledged that the SEEDA work was not produced to reflect the North East commercial property market, it is considered that many of the key findings could hold true for the study area.

² Spatial Requirements of Key Sectors in the South East, SEEDA (2004)

Financial / Business Services

- 3.34 A broad sector which includes a range of specialist financial, insurance and general business activities. Business location decisions in this sector reflect factors such as access to markets / suppliers, access to a skilled and diverse workforce and high quality transport and telecommunications infrastructure. Quality of life factors, including good housing and cultural factors are also important. As a consequence, many such businesses seek city centre premises, however, a number are attracted to more peripheral business park locations that provide lower rates and ample car parking.
- 3.35 As the regional centre, Newcastle's economy has a high representation of business services. The 1Plan for Newcastle and Gateshead, our economic masterplan sets out the aspiration to further expand the financial and business services sectors.
- 3.36 In order to successfully attract a greater number of businesses in the sector, there will be a need to provide more appropriate accommodation. The development of high quality, modern Grade A office accommodation at Gallowgate and Stephenson Quarter will make a significant contribution to this. In the longer term, there is strong potential for future growth in business and financial services.

Distribution

Key locational factors for distribution and logistics activities are the availability of low cost warehousing, storage and distribution sites, whilst access to the strategic road network is essential. This sector is under-represented in Newcastle with warehousing accounting for 4,100 jobs.

- 3.37 Overall there appears to be scope for moderate growth in the distribution / logistics sector, although it will be critical to ensure the continued availability of large, low cost sites with good accessibility.

General Manufacturing

- 3.38 Newcastle has a low proportion of employment in manufacturing relative to regional and national averages. This sector is relatively cost sensitive and therefore access to a supply of affordable sites and premises will remain important, although competition from lower cost locations abroad continues to increase. Other key locational factors for the sector include good transport accessibility and an appropriately skilled local labour force.

Advanced Manufacturing / Engineering

- 3.39 This sector traditionally comprises of higher value manufacturing and engineering that rely upon greater technological and skills outputs. Important locational factors for the sector include proximity to the strategic road network, availability of high quality business park environments and flexible / affordable workspace. However, the critical factor is the availability of a skilled, qualified and experienced workforce.
- 3.40 Newcastle has below average base in these sectors, and forecasts predict further decline.

- 3.41 However, there is considered that the sector offers limited potential for growth at Walker Riverside.

Information Technology

- 3.42 Important locational factors for the sector can include a high quality ICT infrastructure and the availability of a skilled workforce, as well as proximity to major metropolitan centres and the market opportunities they provide. Additionally, ICT businesses can be attracted to areas of high environmental quality.
- 3.43 Newcastle currently has an over-representation of employment in computer related activities.
- 3.44 Overall, this sector is considered to offer the potential for modest growth. This may increase if financial and business services increase in the area. This is because the sector is a key driver of demand for ICT services.

Environmental Technologies / Energy

- 3.45 This sector includes activities such as renewable energy technologies, recycling, water treatment, decontamination and other environmental consultancy. Key locational considerations include the availability of a skilled labour force, proximity to universities with relevant R&D facilities, access to customers/suppliers and available incubator/move-on facilities.
- 3.46 Offshore engineering and the new emerging markets of recycling and renewable energy have been identified as niche growth sectors for Newcastle. As such, it is considered that environmental technologies offer strong growth potential in Newcastle at Neptune Energy Park and at our existing waste sites, Byker Transfer Station.

Healthcare / Biotechnology

- 3.47 The primary locational driver for the sector is access to relevant research and development activity, with many business start-ups requiring close university links. Additionally, access to a pool of suitable graduate labour and proximity to existing bioscience clusters can be important to businesses, whilst large, lower-cost sites are often sought for production facilities. Locations with good access to major metropolitan centres are often viewed as preferable.
- 3.48 Newcastle performs well against a number of locational criteria, including proximity to research activity, notably Newcastle and Northumbria universities. Newcastle, with the development of Science City is anticipated to capture the majority of sub-regional demand for the sector.
- 3.49 Overall, this sector is considered to offer strong growth potential for Newcastle.

Creative Industries

- 3.50 The diverse sector includes activities such as publishing, graphics, software and web-design etc. Key locational factors sought by businesses in this sector include

access to broadband, areas with an attractive lifestyle and sometimes the image of the location. In addition, access to London's large client base is also beneficial. The availability of skilled staff and affordable town centre premises with a good cultural image can also be important. A high proportion of freelance contractors typically work from home or within small offices.

- 3.51 Newcastle has existing concentrations of creative activity, with clusters of suitable premises and workspaces in areas such as Pink Lane and the Ouseburn.
- 3.52 It is considered that the future growth of creative industries is likely to be strong.

Construction

- 3.53 Significant development activity has taken place in Newcastle over the past ten years, including major developments such as the Newcastle Great Park, Grainger Town and the Quayside. Further development is anticipated in the future at Stephenson Quarter, Forth Banks, East Pilgrim Street and Science Central. However, it should be noted that the sector has stalled significantly as a result of the recession.
- 3.54 The majority of employment in the sector is 'on-site' and a result generates little requirement for commercial premises. It does, however create a requirement for storage depots and wholesale premises supplying construction products and materials. Such uses are particularly cost sensitive and will therefore tend to locate in areas of the City with low land values. Overall the future growth potential of the construction sector is considered to be very low.

Figure 13: Sector growth potential and spatial requirements.

Sector	Growth Potential	Specific Spatial Requirements
Advanced engineering	Employment is expected to decline.	Requirements for large industrial premises have been forecast to decline, while the need for research and development and light industrial space is expected to increase.
Banking and insurance	Workforce numbers are forecast to grow. Government policy is for the sector to grow nationally.	Office space with good access. Take up statistics show propensity to locate in the city centre.
Professional services	Workforce numbers are forecast to grow strongly.	Grade A office space with good access. Take up statistics show propensity to locate in the city centre.

Creative industries	Government research has highlighted strong potential for growth. 1PLAN has identified this as a priority.	Wide-ranging and difficult to define. May range from B1c or B1 floorspace for artists using heavy machinery.
Environmental technologies	Government expects value of the market to double between 2005-2015.	High quality small and medium sized units which combine office, research and development and light industrial functions. Offshore renewables may require large scale B2 space.
ICT and communications	Workforce numbers are forecast to grow modestly.	Office space with high band with infrastructure
Public administration	Workforce is forecast to increase. Government policy to relocate departments from London may lead to increase in employment in Newcastle if the city is successful in securing relocations.	Office space with good access.
Wholesale and distribution	Workforce numbers forecast to grow by 2.8%.	Warehouse space for storage and distribution and secure external service/storage yards. Specific requirements may occur in areas close to sources of labour.

Source: NCC Analysis

4. Stakeholder Consultation

Summary

The stakeholder consultation, which comprised a business survey and workshop consultation event, has provided a valuable insight into stakeholders perceptions of Newcastle and has supported the findings of this Employment Land Review. The main conclusions are summarised below:

- ◆ Newcastle is still perceived as the regional capital for office accommodation;
- ◆ office development should be focused on the Urban Core;
- ◆ demand for industrial and warehousing space has fallen back, but there are a number of niche sectors within this market bucking the trend. Examples include offshore engineering and the new emerging markets of recycling and renewable engineering;
- ◆ Newcastle and Tyne and Wear as a whole have a high business retention level;
- ◆ key employment locations in Newcastle (both future and existing) are considered to be the Urban Core (Gallowgate / Science Central / East Pilgrim Street / Stephenson Quarter), Scotswood, Walker Riverside, Newburn Riverside, Sage at Newcastle Great Park and Newcastle International Airport;
- ◆ there is a need to improve skills levels, although it recognised that there are increasingly strong links with the Universities and a number of businesses that is likely to help drive future economic growth;
- ◆ the ELR should plan for growth and not for a continued economic decline and should take account of the fact that the location and employment space required will be market driven, hence a flexible approach is required; and
- ◆ congestion on the A1 and other transport issues are less of a constraint to Newcastle than they are to Gateshead.

Introduction

4.1 Stakeholder consultation has formed an essential part of the ELR process, in order to ensure that employment land projections and allocations meet the needs and aspirations of Newcastle. The stakeholder engagement and consultation undertaken comprises:

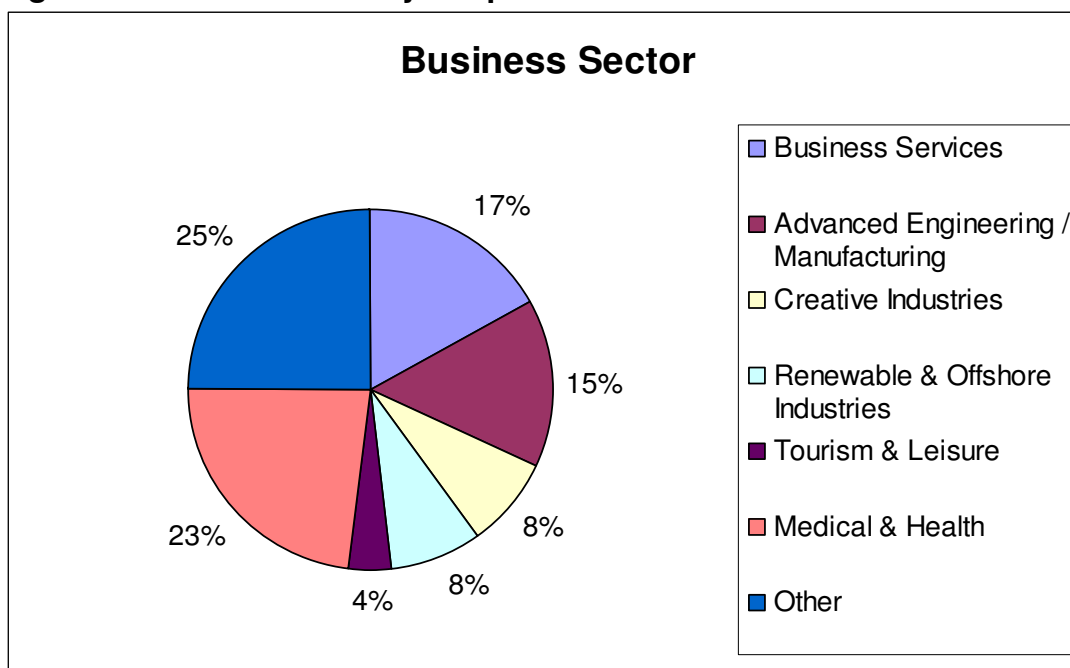
- 1 A business survey which was sent out to 500 local businesses to establish property and land requirements; and
- 2 A stakeholder workshop with attendance from a variety of stakeholders including public sector bodies and local agents.

4.2 A summary of the consultation is presented below:

Business Survey

- 4.3 This section summarises the findings from a business survey undertaken in relation to the Employment Land Review.
- 4.4 A postal survey was sent to 500 businesses in November 2009 in order to get a better understanding of the property and land requirements of the local business community. The businesses selected were a random sample from the Council's Gazetteer database. The sample checked in the first instance to ensure that there was a range of industrial sectors and a range of sized firms from all of the employment locations in the City.
- 4.5 The survey was used to examine a range of issues as outlined below:
1. business background – activity, size and location;
 2. growth aspirations – drivers of future growth and anticipated land and premises requirements;
 3. current premises – type, size and occupation;
 4. the Study Area – benefits, constraints and levels of satisfaction.
- 4.6 A full copy of the business survey is attached at Appendix N.
- 4.7 Overall, of the 500 survey forms distributed, 48 responses were received representing an approximately 10% response rate, which is typical for a postal survey of this type.
- 4.8 Some 19% of responses received were from companies located on industrial estates and 35% were in business/office parks and 12% were located in office conversions, including some located in the City Centre.

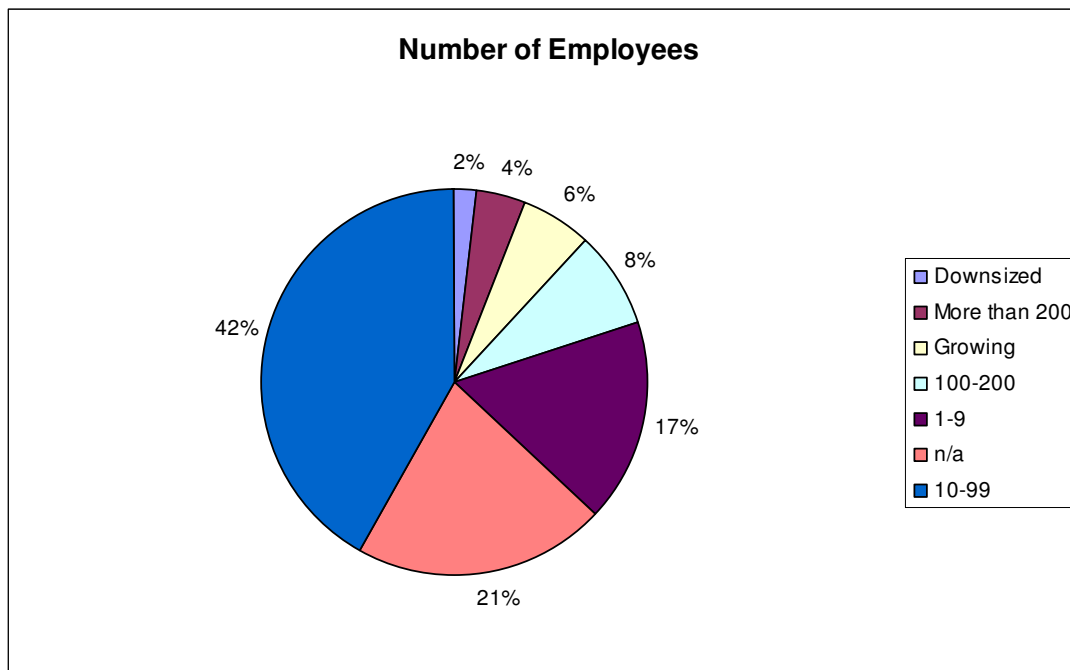
Figure 14: Business Survey Respondents



Source: Newcastle City Council Business Survey 2009

17% of responses were from small sized companies with between 1 and 9 employees, 42% from smaller companies between 10 and 99 employees with 8% from larger firms with between 100 and 200 employees.

Figure 15: Number of Employees



Source: Newcastle City Council Business Survey 2009

- 4.9 The aim of the survey was to identify key issues and general trends rather than permit detailed quantitative analysis. Whilst the number of responses received is just adequate to form a statistically valid sample for the survey as a whole, this would not apply within individual sectors or locations and the analysis focussed on the broad issues identified across the study area.

Markets Served

- 4.10 A reasonable percentage of respondents received were from companies serving international (6%) and national (21%) markets with 60% serving purely local markets (question 8). This suggests that businesses based in the study area primarily serve local markets and are therefore more susceptible to local economic conditions.

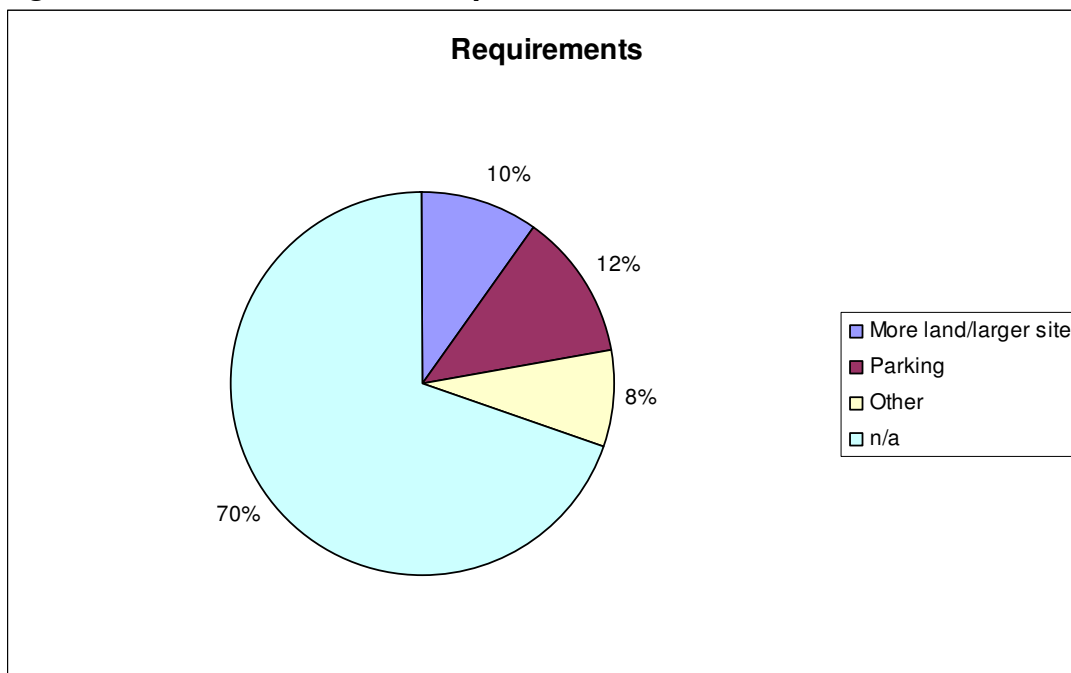
Length of stay within the Study Area

- 4.11 The majority of respondents have been at their present location for between 5 and 15 years (31%). A lower proportion of respondents (17%) have been at their present location for between 15 and 30 years. 2% of businesses did not respond to this question. (Question 15).

Current and future premises requirements

- 4.12 The majority of respondents indicated that they are broadly happy with their current premises. However, 10% would like more land/larger site and 12% would like additional parking.

Figure 16: Future Business Requirements

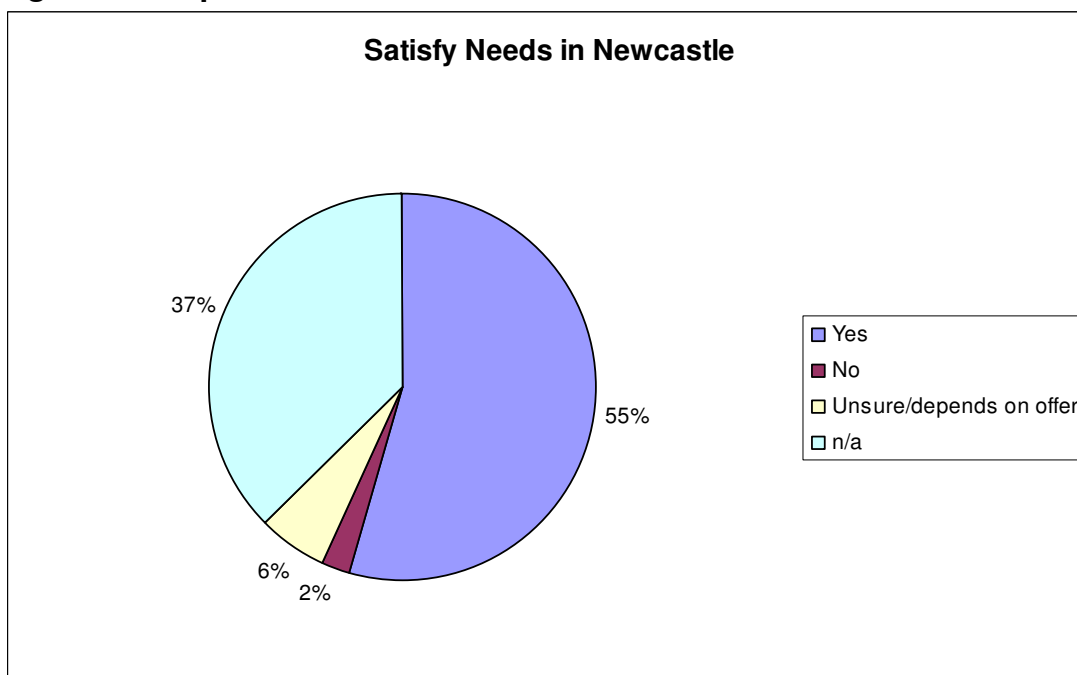


Source: Newcastle City Council Business Survey 2009

Expansion and Relocation Preferences

4.13 Newcastle has a high retention of businesses, on the basis that 55% of businesses responding said they were satisfied with their site/premises in Newcastle, with only 2% unhappy and a further 6% unsure depending on future requirements. A significant proportion of respondents failed to answer the questions regarding premises and future space requirements. This may be because, in general, most respondents are happy with their accommodation, or cannot relocate as they are already in the best location to meet their operational requirements/customer base.

Figure 17: Expansion and Relocation Preferences



Source: Newcastle City Council Business Survey 2009

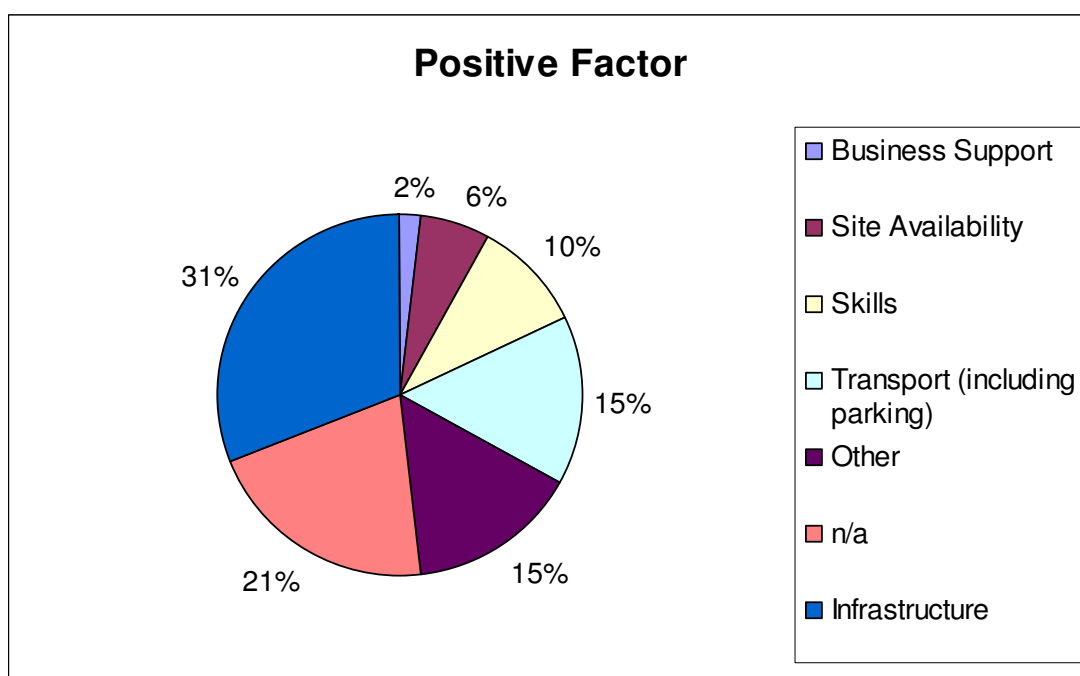
Shortage of Sites

- 4.14 Regarding problems with expansion/relocation opportunities, interestingly 31% of respondents said there was a general shortage of sites, whilst, 31% also believed there was not a shortage. Regarding whether the issue was more to do with a general shortage of sites to meet the needs of specific sectors, 29% identified this as a problem whilst 27% confirmed it was not an issue.

Other Factors

- 4.15 A range of views on other issues affecting businesses were gathered from this survey, however, the main recurring themes were infrastructure and parking issues and that the City does not suffer from a shortage of land, but that the sites are not readily available or suitable for occupation.

Figure 18: Benefits of Newcastle as a business location



Source: Newcastle City Council Business Survey 2009

Key Conclusions Arising from Business Survey

- 4.16 The main conclusions from the business survey can be summarised as:
- infrastructure and parking requirements are a key consideration for the majority of respondents;
 - the majority of respondents confirmed they are happy with their location and premises to meet their needs;
 - there is some indication of a general shortage of suitable sites;
 - only a small percentage of respondents expect to expand or relocate in the future, but all within the sub-region.

Stakeholder Workshops

Internal / External Stakeholder Workshop 2009

Introduction

- 4.17 To assist in the development of the ELR, a visioning workshop was held on 11 December 2009 to discuss the work undertaken to date, the economic future of the City and agree how to plan for employment land to meet these aspirations. The workshop was attended by a range of stakeholders including One North East, Nexus, officers from South Tyneside, Northumberland and Gateshead Councils and local commercial agents.
- 4.18 10 stakeholders attended the workshop and a list of the attendees is included at Appendix O. The workshop commenced with a presentation by the Council, which detailed the following:
- key aims of the Study;
 - an analysis of the City;
 - main findings of the Business Survey;
 - an overview of Newcastle's economic future;
 - supply and take-up of employment land in the City;
 - employment land demand projections; and
 - challenges to providing employment land in the City.
- 4.19 Following this presentation, those attending participated in a round table discussion on the following issues:
- a) Growth Aspirations;
 - b) Challenges and Risk's to Newcastle's Economy; and
 - c) Sites and premises.
- 4.20 The key messages arising from the discussions are summarised below:

Workshop A: Growth Aspirations

- growth aspirations need to be in conformity with RSS. RSS needed to be ambitious to change the North East economy. A net loss of employment land was not considered to be politically acceptable, however concerns were raised that allocating a large amount of employment land was not justifiable. The main reason stated was uncertainty regarding the deliverability of sites; as many sites remain unviable due to significant contamination, smaller sites being undeliverable due to their size; as well as the prospect of future public sector spending cuts;
- it was therefore suggested that some existing employment land should be released for other uses, notably housing;

- North East is lagging behind the rest of the country and Newcastle's ability to come out of the recession was questioned, as arguably the North East has been more significantly affected and is therefore likely to take longer to recover;
- despite this, it was agreed that it is important to plan for growth and not for a continued economic downturn. It was suggested that a fourth scenario was created to build in the recession but also meet RSS aspirations in the longer term. The new scenario would be based on the Public Sector Contraction Scenario to 2013, and Bronze/Silver for the remainder of the plan period;
- Newcastle is still widely recognised as being the regional office capital;
- due to the market downturn it was noted that there was less speculative development taking place in the City Centre than out-of-town, although it was anticipated that this would turn around over time;
- concerns were raised regarding growth of out-of-town office market. The Urban Core should be the main focus for future office development, periphery sites will form a supporting role;
- there was general agreement that the market drives take-up and that a flexible approach to the Employment Land Portfolio is required, with continued marketing through the Annual Monitoring Report (AMR); and

Group B: Challenges and Risks

- impact of the recession on future growth in Newcastle was considered a key challenge. Where should Newcastle place itself in the market for recovery? Newcastle needs to have the right product and critical mass, the Urban Core needs to be the first choice. Better marketing strategy needed for Newcastle and Gateshead;
- the Council needs to work more closely with the industry to facilitate development;
- development usually equals jobs, however development is generally not viable at the moment;
- the challenge is building the right product - grade A floor space (BREEAM etc) as well as re-using existing secondhand office space;
- Newcastle should build on the strengths of the universities, notably through the development of Science Central;
- Science Central is perceived as an opportunist site which prejudices more commercial uses and should be reassessed to ensure flexibility. Parallels such as the Centre for Life took a long time to get off the ground;
- highway capacity issues are less of a challenge to Newcastle than Gateshead. However, good road access, parking and public transport are essential to encourage a more diverse local economy;

- reliance on public sector funding to make difficult sites viable; and
- the shortage of a higher skilled workforce and low graduate retention rates could risk the successful diversification of Newcastle's economy. There is a recognised need to improve skills levels and a need to regenerate the area to attract and retain higher skilled people.

Group C: Sites and Premises

- shortage B2 & B8, but this is constrained by viability due to current market conditions;
- it was questioned whether more offices should be built at Newburn Riverside. The general consensus was that the remainder of Newburn Riverside should be built out as B2 & B8;
- the opportunity to create a critical mass of B2/B8 at Newburn Riverside suggest it could be the next Team Valley;
- Great Park unlikely to materialise until Enterprise Zones status runs out at Cobalt and Quorum Business Parks;
- the Fossway is still popular with supply companies which are drawn to the east end out town due to the Coast Road;
- Brough Park Industrial Park has become less popular following road calming, this should be re-thought;
- Siemens is a reasonable employment site, frontage could be used for trade counter uses; and
- trade off needs to be made between Employment and Regeneration.

Internal Workshop 2012

Introduction

4.21 To assist with the update of the Office Needs Study (ONS) and run concurrently with the review of the ELR, an internal Stakeholder workshop was held on 4 April 2012 to discuss the work undertaken to update the ONS, the future economic outlook of the Newcastle and Gateshead and growth potential. The workshop provided an update following the introduction of the National Planning Policy Framework (NPPF). The workshop looked at 3 Spatial Strategy Options, as below:

- Option 1: run with the status quo of the Core Strategy
- Option 2: focus all growth in the Urban Core and remove any focus on out of centre locations
- Option 3: adopt a market driven strategy that emphasizes lower risk sites

4.22 The emerging findings are outlined below:

- Office development not viable in current economic climate. Values and levels of abnormal costs vary from location to location and thus when the development market returns the need and scale of public sector intervention will also vary. In theory office development could occur on any of the sites considered by the ONA if sufficient public sector gap funding was available.
- Occupier interest is recovering. In 2011 only small office requirements. Larger office requirements now starting to return. Interest in and lettings of small suites at Northern Design Centre and Baltimore House encouraging. In Newcastle the letting to B SkyB of part of Wellbar Central also indicates an improvement in the market. It has been only large scale letting to occur for several years.
- It is reasonable to aim for a 20:80 split of new office floorspace between Gateshead and Newcastle. Gateshead's past share had been 13%. Increasing its future share beyond 20% would require replacement of Newcastle's existing office stock within Gateshead and enforced relocations.
- Although NPPF states that long term protection of employment sites is to be avoided Local Plans can include criteria to assess sites rather than designate sites and evidence of future demand can be used to justify levels of allocation.
- There should be a choice and variety of sites. To only provide city centre office sites risks losing requirements to other districts or restricting business expansion. A solus site for an HQ office function should aim to be around 10 hectares. To ensure sufficient critical mass an office park should aim to be of a similar size.

5. Property Market Assessment

Summary

The key issue affecting local authorities when compiling their Employment Land portfolios at present is the uncertainty over the economic future of the UK as a whole. Economic growth in both the UK and the study area over the past decade has been largely reliant upon the expansion of the financial and business services sector. While growth in these sectors has been stagnant over the past few years over the long term these are once again set to grow. We believe that two areas identified for growth, renewable energy and off-shore engineering, could be planned for in terms of employment land, but beyond that sector-specific forecasting loses certainty. In addition to this, manufactures such as Nissan offer real potential for the entire region should they be allocated the contracts for the production of new models. As such, the most important characteristic for any portfolio of employment land is flexibility to ensure sites within a region are fit for purpose.

Despite policy pressures to change the employment profile of the study area to one focussed on services, general industrial and distribution development still has a large part to play in the future of the local economy due to the proximity to the airport, major arterial roads and the East Coast main line. This appears to be reflected in the current short term Employment Land portfolio for general industrial use which is substantially less than for mixed / office use despite its lower density of space-employment ratio. When considering how to best place Newcastle in order to maximise employment outputs from any future economic recovery, it is important to have a portfolio flexible enough to allow development of property in all possible sectors. While the main driver over the past decade, across the study area and the UK as a whole, has been business services and the financial sector, there is no clear idea of whether these sectors will continue to drive growth over the coming decade.

Newcastle has both a strong City Centre and out of town markets. There is a strong level of demand for City Centre office stock. Newcastle has cemented its position as the most prestigious location for occupiers looking for space within the North East and, as such, this is reflected in relatively high rental levels. Despite the downturn, high quality developments such as Wellbar Central show that a good product can still attract demand.

Out of town the office market remains dominated by the former Enterprise Zone developments of Quorum and Cobalt with limited new development in out of town offices within Newcastle and no significant schemes in the pipeline to come forward over the short term. Headline rents for out of town space, where available, remain in the order of £160 per sq m (£15 per sq ft).

Rents have remained relatively robust despite the economic climate and good quality stock has been occupied quickly. Rents are expected to stay around the £215 per sq m (£20 per sq.ft) mark with a forecast of a small rise in 2013 due to a lack of available prime stock.

The City is in a strong location for industrial use on A1 corridor and, although currently seen as second best to Gateshead, there are signs that this may be changing. Team Valley Trading Estate has effectively run out of room to expand although redevelopment is taking place. This may lead for opportunities in the short to medium term for Newcastle as occupiers look at a wider area for modern industrial stock. The current portfolio lacks the quantity of employment land supply for industrial use available in the short term. While there is likely to be little interest in developing out these sites in the short term, the economic climate is likely to push back timescales on the delivery of the majority of the portfolio.

The renewable and offshore energy sector has also played its part in encouraging growth, with the North East positioning itself as a focal point for associated business and occupiers supporting the industry.

One of the largest factors influencing the supply of industrial space is the introduction of the Empty Rates legislation. This legislation has the unintended consequence of reducing speculatively built stock and increasing the rate at which tertiary stock is demolished. As such, there is potential for undersupply in the short term when demand is rekindled as any available stock of good quality is likely to be scarce.

Introduction

- 5.1 The following summary analysis will seek to provide an overview of the current commercial (office and industrial) property market across Newcastle to set the local context for spatial planning policies.
- 5.2 The property market analysis was prepared in 2010 and updated as part of this review by DTZ in 2012 utilising their local market knowledge and professional expertise. It is guided by two main questions. First, continuing the economic analysis in Chapter 3, we look at qualitative aspects of the demand for land and property, considering for what kinds of businesses Newcastle is an attractive location and what kinds of land and properties these businesses will require.
- 5.3 The second issue for this chapter is the balance of demand and supply. We consider the availability of and cost of property and land against the requirements of occupiers and developers, both to provide a baseline for the quantitative forecasts that follow and to add to the qualitative dimension, considering what kinds of properties are under or over-supplied.
- 5.4 A full analysis of the commercial property markets is included at Appendix M.

Offices

Market Geography and Competing Locations

- 5.5 Newcastle is the premier office location in the North East, and the relative isolation of this market from the rest of the UK means that it functions as a major regional centre. After the decline of the of the UK's industrial base in the 1980's and 1990's, upon which Newcastle's economy historically depended, there was a market revival of the local economy. Consequential demand for office accommodation has been

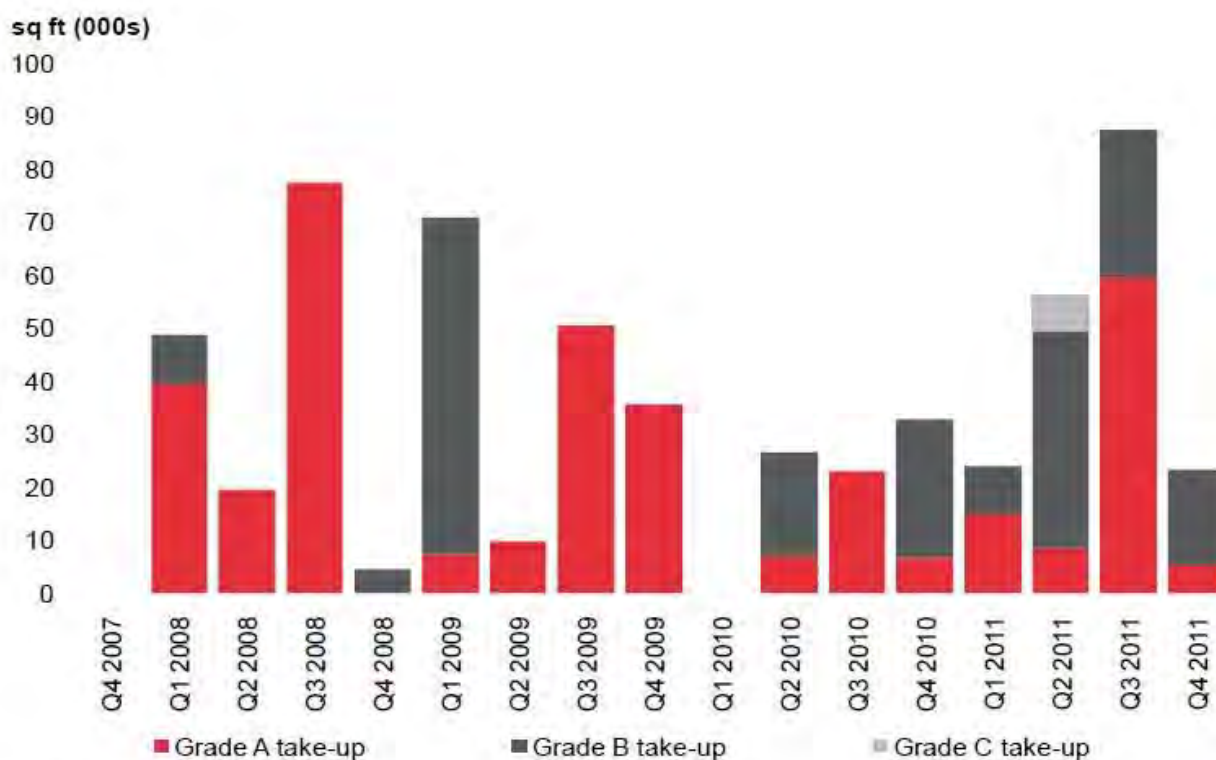
generated by companies from the north east or for regional offices for national firms.

- 5.6 Office floorspace, lies at the heart of the City's regional and sub-regional role, and are crucial to the aims of RSS, NewcastleGateshead Accelerated Development Zone, Science City, and the North East Local Enterprise Zone. The last version of the Employment Land Review identified large office development potential at 3 principal office locations: the City Centre; Newcastle Great Park; and Newburn Riverside. However, the current view is that development will be focussed on the City Centre and Newcastle International Airport. It is now anticipated that Great Park will be developed out primarily for housing and that Newburn Riverside will also come forward for housing.
- 5.7 Office uses are defined in the Use Classes Order 1987, each with its own set of requirements. The two principal office market sectors which are relevant to the ELR are:
- a. The general B1 a) office market comprises corporate, professional, legal, finance and business organisations which require larger floor plates, for prestige, main office, and "back office" purposes such as call centres. Development may be speculatively built for leasing or sale on the open market, or purpose built for particular public or private sector occupiers. The City Centre is the principal location, highly accessible to employees through public transport, or through City Centre housing.
 - b. Class B1 b) knowledge transfer and research organisations with strong links to the Universities and College will be a crucial part of Newcastle's growth, through, for example, International Centre for Life, and the emerging Science City project. Identified locations include Science Central at the former Tyne Brewery, and Newcastle General Hospital.
- 5.8 Newcastle's city centre office market can be split into two main areas – the traditional core business area around Grey Street and Pilgrim Street, the Quayside; and the western fringe around St James Boulevard, Gallowgate and Stephenson Quarter.
- 5.9 Supply is constrained due to the compact nature of the centre, as well as competing demand for retail, leisure and residential space. As a result, supply has struggled to meet demand and this has resulted in out-of-centre developments both in Newcastle and the surrounding authorities, notably North Tyneside.
- 5.10 As well as the requirements of major corporate or institutional users, economic strategies require the provision of smaller suites of premises for small and medium enterprises (SMEs), ie business start-ups, managed workspace, move-on accommodation etc. These premises may combine characteristics of both B1 a), B1 b), and possibly even B1 c) light industry, where low key making, assembling or other processes may be carried out without detriment to neighbours through noise, fumes etc. This type of accommodation is particularly important to Newcastle's growing creative industries cluster in the Ouseburn Regeneration Area, as it lends itself to conversions or new build in brownfield infill locations and smaller sites, and a lively mix of uses and activities. SME accommodation is considered in further detail below.

Recent Market Trends

- 5.11 The availability of offices premises is increasing, take-up fell in all but two of the nine regional markets in the last quarter of 2011, with only Bristol and Manchester bucking the trend. The eurozone crisis and the prospect of renewed recession in Europe and in the UK have further weakened an already fragile sentiment.
- 5.12 As the regional centre for the North East, Newcastle has important public sector functions. As well as local and government operations for Newcastle, there are a number of national government departments based in the City. The most significant are the Inland Revenue and the Department for Work and Pensions.
- 5.13 Despite this, both the size and overall volume of deals in Newcastle city centre declined in the latter part of 2011 with office lettings totalling 2,140 sq m (23,000 sq ft). However, this followed an unusually strong quarter, mainly as a result of the 3,440 sq m (37,000 sq ft) BSkyB letting at Wellbar Central.
- 5.14 The largest city centre deal was for 650 sq m (7,000 sq ft) of grade B space to software provider JHC at St Nicholas Street. Avanta Enterprise Ltd also took 465 sq m (5,000 sq ft) of grade B space. The remainder of city centre activity consisted of sub-465 sq m (5,000 sq ft) lettings primarily driven by lease events.

Figure 19: Quarterly take-up by grade



Source: DTZ Research

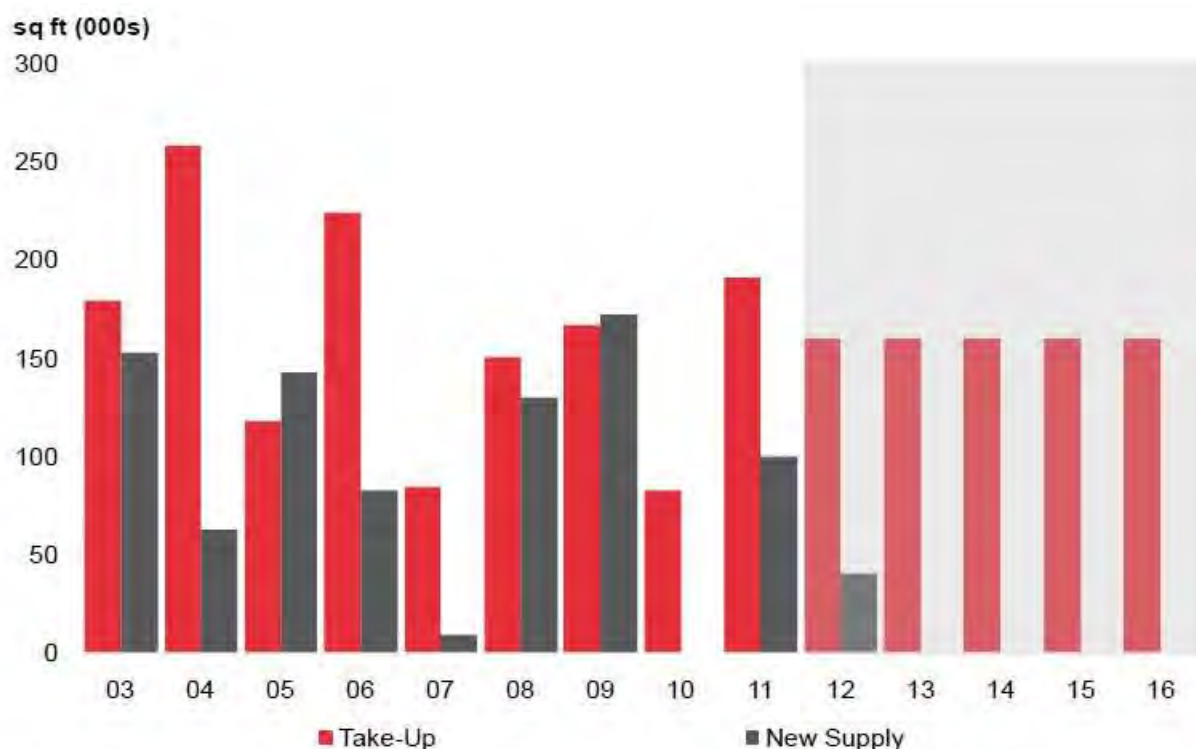
- 5.15 Tenants have remained cautious in the current economic environment, with the majority focussing on 'total cost minimisation' rather than taking advantage of the current market to seek out discounted better quality space.

- 5.16 Landlords with available capital have been able to divide vacant floors into smaller suites which are proving easier to let in the current market. For example, two small suites fitted out to a high standard were let at City Quadrant in Q4 for £215 per sq m (£20 per sq ft). In addition, there has been some inward movement into Newcastle from off shore companies relocating from Aberdeen. The primary reason cited is the abundance of suitably skilled staff in Newcastle. One such example is ASP Shipping, which took 232 sq m (2,500 sq ft) of grade A space at Quayside House in the city centre.
- 5.17 The out of town market experienced more demand than the city centre in terms of both the individual size and overall number of transactions. Obviously this shows a clear market preference for space outside of the City Centre and, as such, is an important consideration for the Employment Land Review. We have identified 3 key reasons why out of town space has been so dominant in the Newcastle area:
- the availability of Enterprise Zone incentives in an attempt to replace employment uses lost in the 1980s and 1990s has given developers the financial incentive, through either reduced taxes or the easing of statutory regulation (predominantly planning), to build employment accommodation out of town;
 - the major deals seen over the last 5 years tend to have been headquarter style buildings with bigger floorplates. Both the Sage Group and Northern Rock have taken large pre-lets on large buildings out of the city centre boundary; and
 - the major driver of demand for office stock over the past 5 years has been from private and public sector occupiers operating back office functions. As such the features that have most attracted occupier have been access to road network, cheap rent, and parking. While City Centre offices are undoubtedly sequentially preferable from a planning perspective, it is difficult to compete with the massive incentives offered at out-of-centre locations. It is particularly disappointing that HQ type developments have left the city centre for out of centre locations which has resulted in a 'hollowing out' of the centre. However, it is important to remember that occupiers that have historically been attracted to the Newcastle area will continue to be.

Take Up

- 5.18 Annual take up for 2012 reached 14,300 sq m (154,000 sq ft), a slight decrease from 2011. This is due to the current environment of economic constraint coupled with the number of large requirements satisfied in 2010 and to a lesser extent in 2011. Take-up is forecast to increase in 2013.
- 5.19 The 5 year average take-up is 13,715 sq m based on current availability of 74,464 sq m. This represents only 5.43 years supply. The development pipeline at the moment consists only of Stephenson Quarter incorporating 3,716 sq m (40,000 sq ft) of new office space and take-up is forecast to stay at in or around the 5 year average. It is also worth pointing out that take-up is very much to be focussed on quality stock, therefore secondary space which does not meet occupiers requirements will remain vacant.

Figure 20 : Annual take-up and new supply



Source: DTZ Research

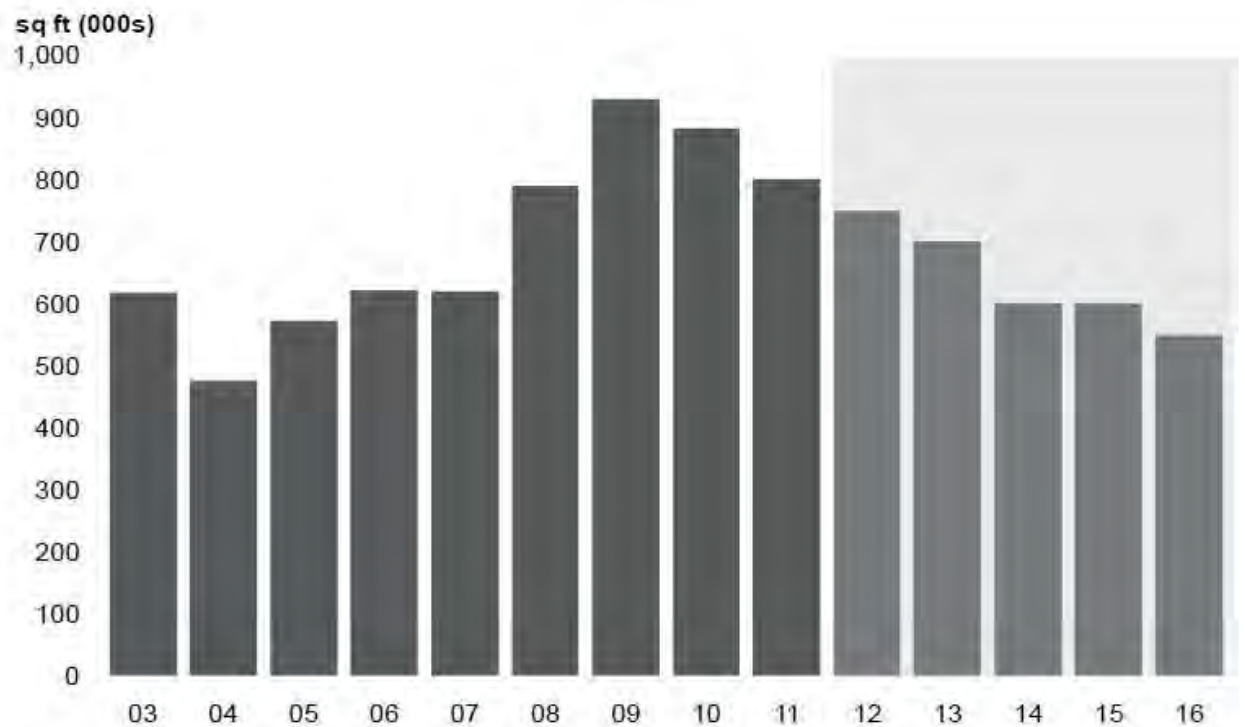
Availability

- 5.20 There is currently 1,042,277 sq m of office floorspace in Newcastle. 19% of this is vacant. Over the last eleven years, just over 280,000 sq m of Grade A office floorspace has been developed, 24% of this is vacant.
- 5.21 While on the face of things this represents a picture of substantial oversupply, it tells only part of a much bigger story. Availability, take-up and supply must be looked at in conjunction and not in isolation.
- 5.22 The economic downturn has been indiscriminate in its impact, as is shown in the below table. However, it is important to note that behind every figure there is a story and it is arguable as to whether this 'vacant' floorspace is actually available. Much of the vacant floorspace is secondary in terms of location and quality and much of it has been vacant for a long time (ie Grainger Town) and will continue to be vacant for the foreseeable future.

Figure 21: Vacancy rate by location

Location	Total Units	Vacant Units	Vacancy Rate
City Centre	1544	373	24%
Jesmond	356	81	23%
Gosforth	191	60	31%
Fenham & Elswick	205	59	29%

Figure 22: Availability, 2003-16



Source: DTZ Research

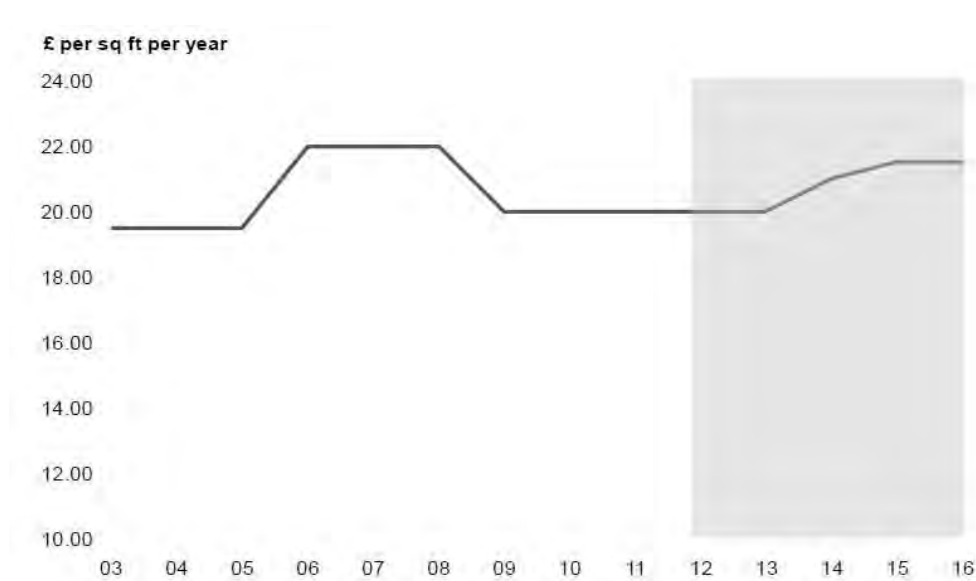
Pipeline Development

- 5.23 Current availability stands at 74,464 sq m (801,532 sq), based on the 5 year take-up rate of 13,715 sq m (147,628 sq ft), this represents approximately 5.43 years supply.
- 5.24 The development pipeline at the moment consists primarily of Stephenson Quarter. Stephenson Quarter, is a mixed use redevelopment including 2 hotels, 40,000 sq m of B1 offices, art gallery, retail space and 156 flats by Stephenson Quarter Developments Ltd. It has planning permission, and pre-lets in place and is part of the NewcastleGateshead Accelerated Development Zone.
- 5.25 Beyond Stephenson Quarter, key City Centre office developments in the pipeline include Ouseburn and East Quayside, Strawberry Place and the Quayside. The Ouseburn and East Quayside Development Framework sets down how key sites, including Lower Steenbergs (including the Toffee Factory), Malmo Quay and East Bank will be brought forward as part of a phased development programme. Although the Ouseburn is very much an edge-of-centre location, it will be an intrinsic part of the regeneration of the area.
- 5.26 Strawberry Place, to be known as 'St James Point', is a proposal for over 10,000 sq. ft of office place by Circle Red properties. It currently has planning permission and is awaiting a pre-let before construction starts.
- 5.27 Quayside currently offers two development opportunities (Plot 12 and 57 Quayside) with potential delivery in the short term. 57 Quayside is a proposal by UK Land Estates which has the potential to deliver 2,787.09 sq m / 30,000 sq ft of offices. It currently has planning permission and is awaiting interest from potential tenants

before starting on site. Plot 12 Quayside, or 'Imperial Quay' as it has also been known, is a second and larger scheme in the Quayside area. Although cancelled, a previous scheme by AWG proposed 9,290 sq m / 100,000 sq ft of office development on the site and it is still believed to offer substantial potential for an office scheme of a significant size.

- 5.28 The key out-of-town office locations for longer term development is Newcastle Great Park and Newcastle International Airport.
- 5.29 There is a mandate to significantly rationalise the 278,700 sq m (3,000,000 sq ft) government estate around the region. However, the process will be staggered so any fall in availability over the medium term will only be gradual.
- 5.30 Most large corporate occupiers have essentially completed their downsizing. However, occasional relocations and rationalisation can be expected over the next couple of years as and when lease events occur, which will boost take-up figures.
- 5.31 Prime rents remained unchanged at £215 per sq m (£20 per sq ft), evidenced by the two grade A lettings at City Quadrant. Headline rents continue to be supported by inducements, such as shorter lease lengths and rent-free periods, as bargaining power shifts more in favour of tenants.

Figure 23: Prime Rents



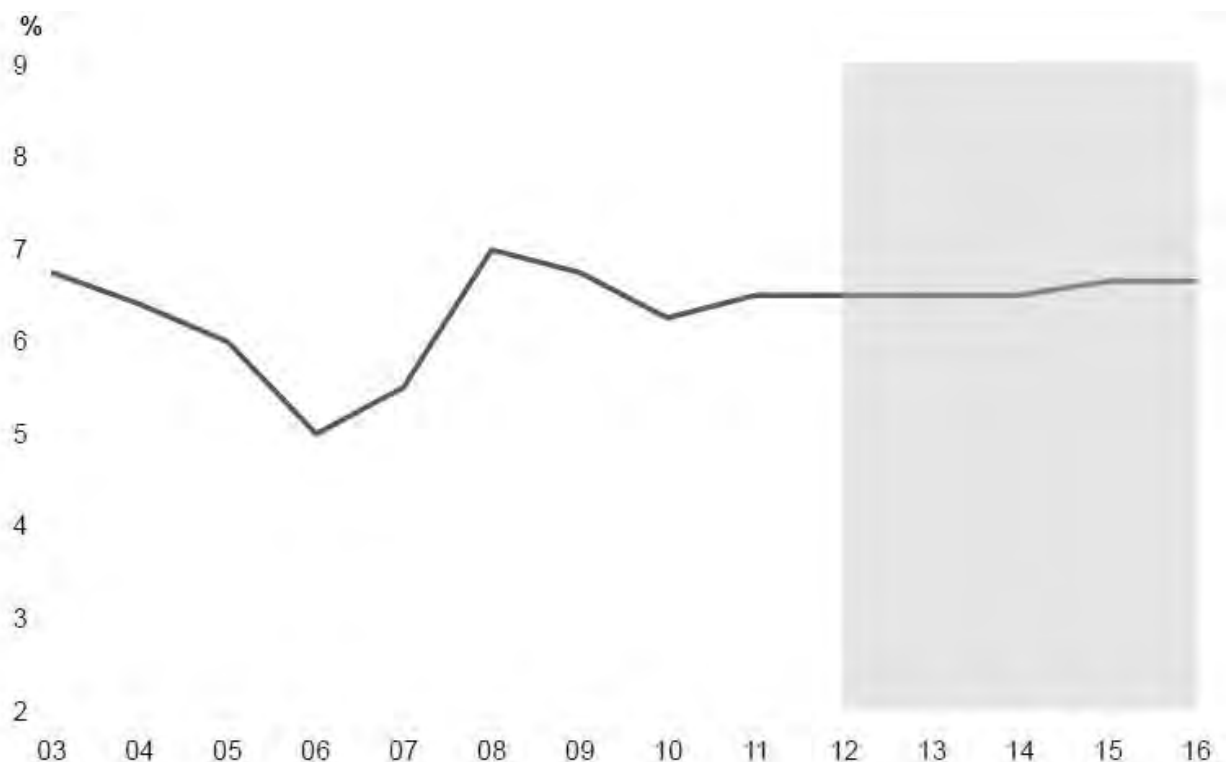
Source: DTZ Research

Investor Appetite

- 5.32 Investor sentiment worsened over 2011 in reaction to the escalating eurozone crisis and anticipated disruption to capital flows, as well as the prospects of a renewed domestic recession. A lack of prime transactions meant prime office yields were maintained in Newcastle at 6.5% for Q4.
- 5.33 UK retail fund net flows turned negative in September 2011, taking the pressure off fund managers to invest. UK pension funds have become more cautious towards regional lot sizes greater than £50m.

- 5.34 Potential buyers have become more sensitive to the length of unexpired income. An otherwise good quality property in a good location with only a few years left on the lease could be disregarded by the institutions. Many of the smaller lot size properties (ie around £4m) are particularly affected because they are also overlooked by overseas investors and all but the smallest opportunistic investors.
- 5.35 Overseas investors, particularly the German funds, are still successfully targeting the larger prime assets in the major regional markets where there are higher income yields on offer than properties in the South East.
- 5.36 There is a range of opportunistic buyers and well-capitalised property companies targeting geared returns of 15-20%. Debt-backed buyers tend to be the larger organisations that borrow on a group wide facility basis rather than by asset. However on a per asset basis the gearing ratio is unlikely to be greater than 50% at present.
- 5.37 There continues to be a significant mismatch between buyer and seller price expectations, which is limiting transactions. Deals are being achieved where banks have pressurised the vendor to reduce their gearing and rebalance portfolios.
- 5.38 The number of insolvency sales continues to increase, although the banks will delay disposals to undertake asset management first. Interest is asset-specific, being reliant on potential to add value, and so some poorer assets remain unsold.

Figure 24: Yields



Source: DTZ Research

- 5.39 Prime yields are expected to remain broadly stable but secondary yields are expected to drift out further in 2012. Major influences for 2012 will be bank-led sales and the continued erosion of unexpired terms, which points to more pragmatism on the part of vendors with respect to pricing.

General Industrial

Market Geography and Competing Locations

- 5.40 The city has lost much of its legacy of traditional industries such as shipbuilding and brewing, but still retains a substantial traditional industrial base, which needs to be conserved, with important sectors such as electrical engineering, offshore marine technology, military vehicles, and food manufacturing.
- 5.41 Newcastle has a total stock of 553.89ha industrial / warehouse space which is relatively dispersed across the City. Traditionally, many of the City's industrial estates were developed on Council owned land in residential areas, so as to be close to the local workforce. Many others are clustered around the A1 and A19.
- 5.42 In line with the trend across the country, manufacturing has declined in the area. The City's location in the north-east, remote from the country's motorway network precludes it from being considered for major national distribution requirements. However, Newcastle nevertheless has a thriving warehousing sector which predominantly services the local and regional economy.

Recent Market Trends

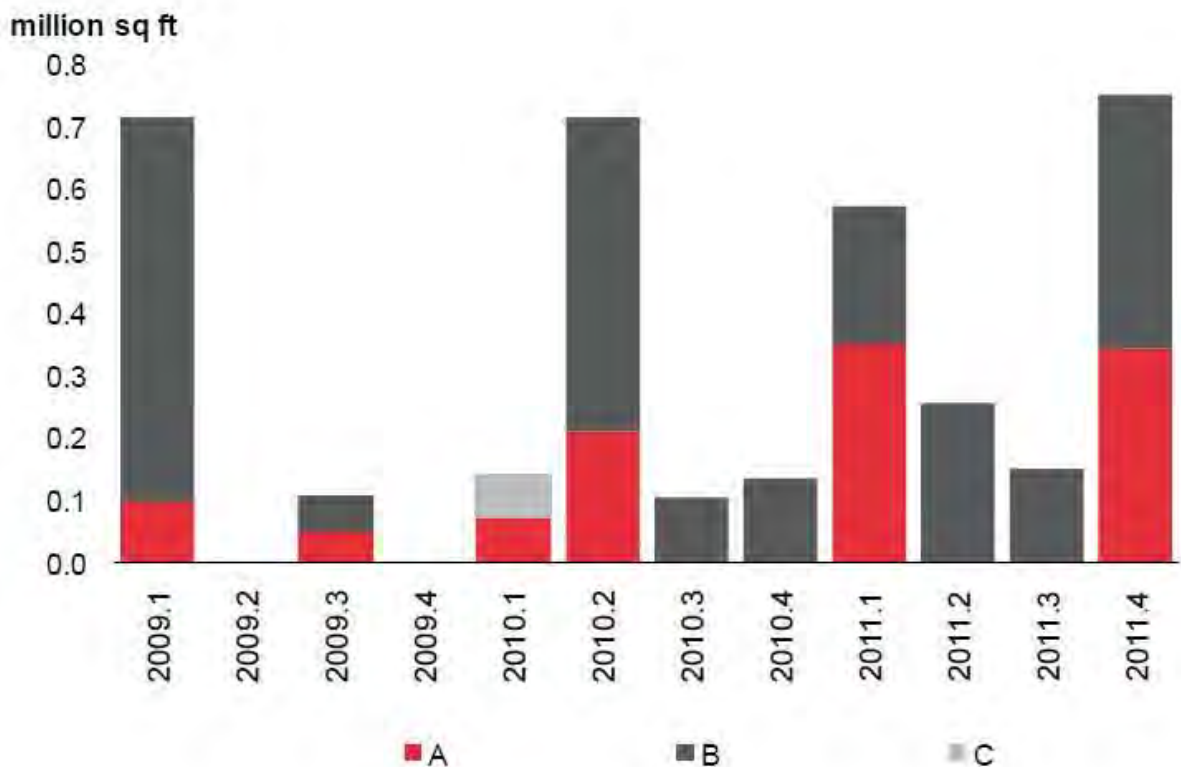
- 5.43 The historic demand for industrial floorspace has been considerably less dynamic than for the office market. This has resulted in a more steady supply of space rather than the 'boom and bust' of the office market.
- 5.44 However, continuing competition for land in the area has resulted in small industrial sites being lost for conversion / redevelopment for other more valuable uses such as residential. This has been especially been the case of for many older poorer quality industrial buildings in predominantly residential areas e.g. Carricks Biscuit factory redeveloped for housing as 'The Bakers', Cowgate. During the last property cycle, such challenges have put pressure on the need to have a robust portfolio of employment land to adapt to these challenges.
- 5.45 Despite the economic downturn, Newcastle has seen a high proportion of industrial floorspace built speculatively. The 5 year average to 2010, showed 66% of space had been speculative and 34% has been pre-let. This differs notably from the office market which saw a much higher percentage of pre-let than speculative development. Developers' willingness to build speculatively is likely to have been tempered somewhat by the introduction of empty rates legislation. This combined with falling rents is likely to do little to encourage development of new stock.

Take Up

- 5.46 Q4 take-up was 69,675 sq m (750,000 sq ft), over double the long-term quarterly average. The yearly total of 157,935 sq m (1.7m sq ft) is also 50% higher than the long-term yearly average.

- 5.47 The 5 year take-up is 68,144 sq m (733,498 sq ft) on current availability of 752,428 sq m (8,099,131 sq ft). This represents approximately 11 years supply.
- 5.48 The diminishing supply of new properties is shoring up prime rental values to a certain extent. That said, rents for secondary properties continue to fall as lease events see occupiers taking advantage of the current economic conditions by aggressively negotiating deals on better quality stock.
- 5.49 Finally, deals on tertiary accommodation are becoming ever more competitive with landlords keen to offset the rating liability and security risks of vacant buildings.
- 5.50 It is important to note that the majority of demand for industrial space is focussed in the Gateshead area. However, Team Valley Trading Estate, the most popular regional employment site is now almost entirely built out. The limiting of new supply in this area may lead to opportunities in Newcastle.

Figure 25: North East take-up by grade



Source: DTZ Research

Availability

- 5.51 At the end of March 2012 there was some 17.1 million sq ft of industrial floorspace available within the North East industrial market. Availability remained relatively unchanged compared with the end of September 2011. Availability in the North East accounted for 5.1% of the GB total. Availability in units of 1,000 to 99,999 sq ft accounted for 13.4 million sq ft of the total available floorspace. In the region around 11% of the available floorspace comprised new or refurbished floorspace, lower than the GB average of 14%. North East Business Space figures (March

2012) estimate that 3% of industrial stock is vacant.

- 5.52 Availability of grade A space of all sizes is limited, this is reflected in the current short term Employment Land portfolio for general industrial use which is substantially less than for mixed / office use despite its lower density of space-employment ratio.
- 5.53 Figure 26 illustrates Newcastle's distinct industrial hubs:

Figure 26: Industrial Hubs

Industrial Hubs	Type of units
Airport Industrial Estate	500 - 20,000 sq. ft
Brough Park Trading Estate	1,000 - 40,000 sq. ft
Newburn Riverside	5,000 - 180,000 sq. ft
Benfield Business Park	5,000 - 35,000 sq. ft
Brunswick Industrial Estate	500 - 10,000 sq. ft

Source: DTZ

Pipeline Development

- 5.54 Flexibility of the employment land portfolio is key to it being fit for purpose. Newburn Riverside in the outer west currently provides a substantial amount of general employment land. However, the Park has experienced a slow take-up of units which may reflect the appeal of the park, as well as the rental values and sizes of units available. The future of Newburn Riverside and the emerging portfolio will ensure a choice of sites to meet a range of business needs/office segments and provide flexibility for the plan to respond to changing economic circumstances.

6. Taking Stock of the Existing Situation

Summary

Newcastle has almost 2.5 million sq m of employment floorspace, which, within Tyne and Wear, falls behind Sunderland and Gateshead. The City has the sub-region's largest stock of floorspace in per capita terms.

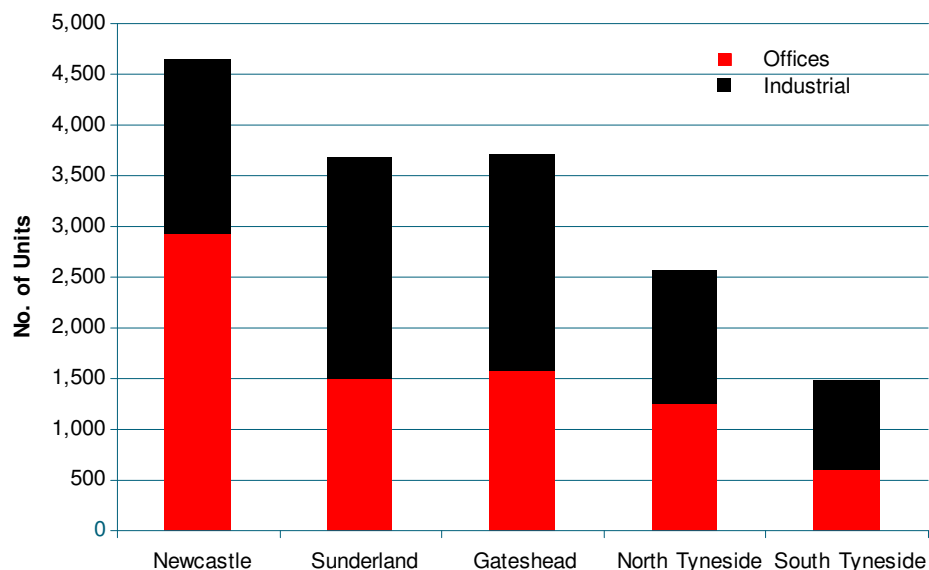
Over the period 1998-2012, Newcastle experienced a net increase of 162,920 sq m of employment space, equivalent to growth of 7.5%. This was driven by increases in office and industrial floorspace, although a greater rate of change was recorded in the office market.

Based on the existing data, over this period (2000 – 2012), some 83.30ha has been developed for B1, B2 and B8, equating to 6.95ha per annum.

Introduction

- 6.1 The number of industrial and offices premises in Newcastle is summarised in Figure 27. Newcastle contains more premises than any other Tyne and Wear authorities.

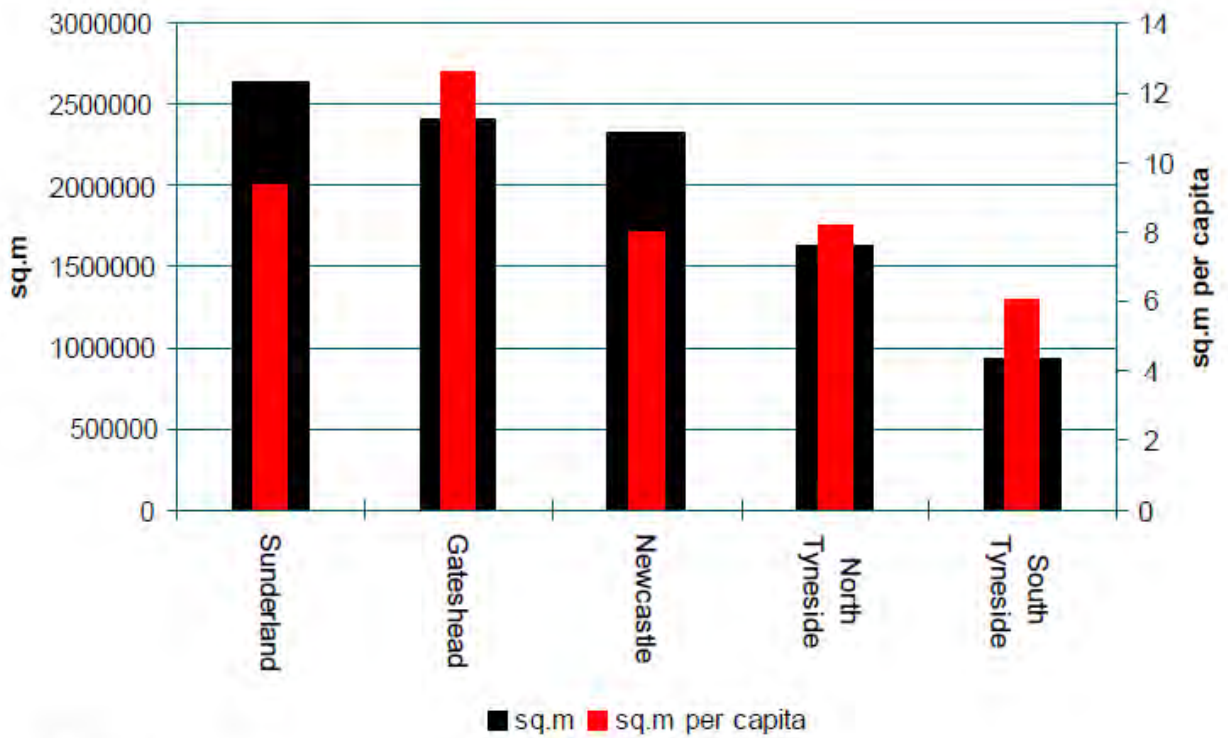
Figure 27: Number of Office and Industrial Premises 2012



Source: VOA

- 6.2 Figure 28 below summarises the total stock of industrial and office floorspace within Newcastle and the neighbouring authorities of Tyne and Wear. This highlights that with just over 2.5 million sq m of employment space, the City contains less floorspace than Sunderland. Furthermore, benchmarking this against the population of each area illustrates that Newcastle has the fourth highest floorspace (9 sq m for every resident) in Tyne and Wear.

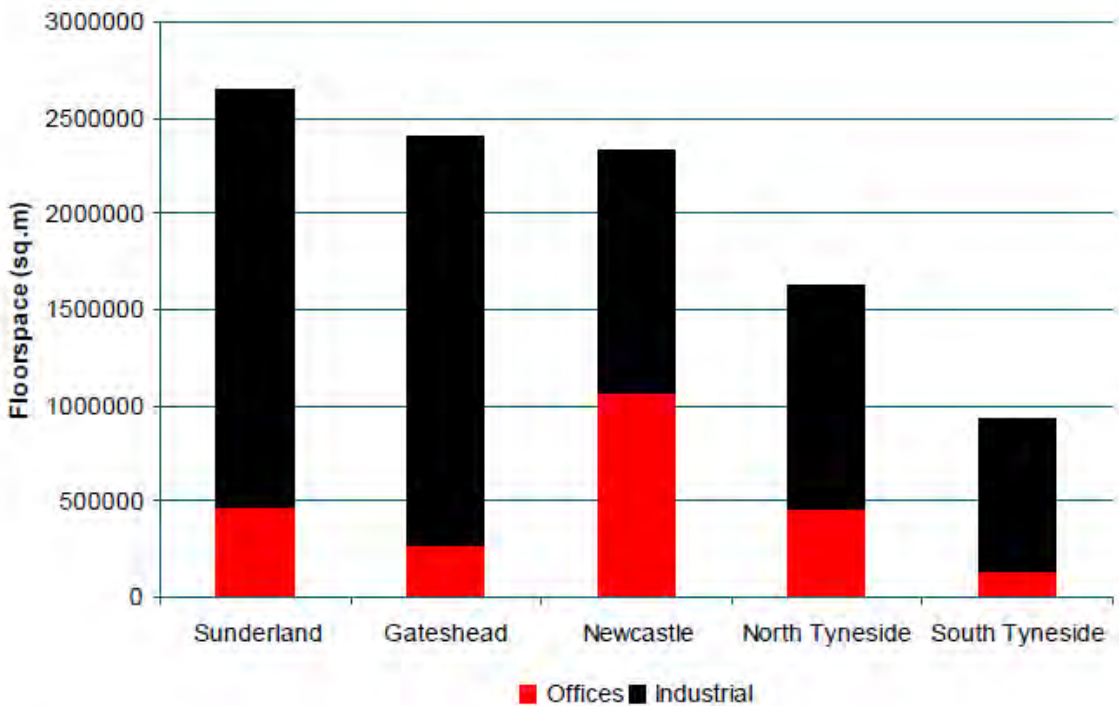
Figure 28: Office and Industrial Floorspace 2012



Source: VOA

6.3 Figure 29 illustrates the level of floorspace in Newcastle and the surrounding authorities accounted for by different employment uses. This shows the importance of Newcastle as a major industrial and office location.

Figure 29: Level of floorspace by use



Source: VOA

6.4 Figure 30 below examines the change in Newcastle’s stock of employment space, by type, over the period 1998-2012. This shows that the City’s total stock of employment space grew by only 7.5%, the lowest of all of the Tyne and Wear authorities.

Figure 30: Change to employment space and by type 1998 - 2012

	Offices		Industrial		Total	
	sq m	%	sq m	%	sq m	%
Newcastle upon Tyne	399,857	60	-236,937	-16	162,920	7.5
Sunderland	331,045	240	326,248	18	657,298	33.2
Gateshead	121,600	81	109,474	5	231,074	10.6
North Tyneside	351,495	329	-19,929	-2	331,566	25.7
South Tyneside	91,853	200	-7,513	18	657,293	8

Source: VOA

Emerging Supply of Employment Space

- 6.5 An analysis of Newcastle’s development pipeline can help to understand the projected future supply of employment space. The data has separate office and general industrial proposals, ignoring proposals of less than 4,000 sq m and applications for changes of use or for extensions.
- 6.6 Since the start of 2006, 18 applications have been submitted for industrial development. If developed out this would result in a forward supply of 15,692 sq m.
- 6.7 For the office market, the analysis illustrated that there have been 123 applications over the same period. If developed out this would result in a forward supply of 52,768 sq m.

Property Availability / Vacancy Levels

- 6.8 Figure 31 illustrates that approximately 10% of all commercial property in Newcastle is currently vacant. This is in line with the 9/10% rate that is typical of a normal healthy market, which is to be expected under current market conditions.
- 6.9 The table demonstrates that this oversupply is most acute within the office market, where almost 1 in 5 premises are currently vacant.
- 6.10 Levels of vacancy are far lower with respect to the industrial market, indicating a ‘healthy’ vacancy rate.

Figure 31: Commercial Property Vacancy across Tyne & Wear

Vacancy Rate (%)			
	Offices	Industrial	Total
Newcastle upon Tyne	18	3	10
Sunderland	11	13	13
Gateshead	34	11	14
North Tyneside	31	11	16
South Tyneside	19	11	12

Source: North East Business Space, March 2012

Development Rates: Historical Gross Take-Up of Employment Land

- 6.11 The likely level of gross demand for new floor space in Newcastle, has been drawn from the annual completions of new office, industrial and warehousing space from 1994-2011. Accordingly, on an annual basis a certain amount of floor space has been built to meet the needs of businesses that want to move or expand within or into the area.
- 6.12 Table 32 outlines the gross average completion rates over five year periods for office, industrial and storage space between 1994 and 2011.

Figure 32: Average Floor Space Completions in Newcastle, 1994 – 2011

Floorspace (sq m) Sector	1994-1998	1999-2003	2004-2008	2009-2011	Total Completions
Warehousing	9,400	6,900	5,800	1,523	23,623
Office	11,700	40,100	52,000	49,327	153,127
Industrial	12,600	8,900	7,700	23,642	52,842
Total	33,700	55,900	65,500	30,446	155,100

Source: Newcastle City Council AMR

- 6.13 Historical data for Newcastle highlights the declining new build of industrial space, which for 2004- 2008 averaged 7,700 sq m per year. However, 2009 – 2011 data shows a drastic increase made up by 2 substantial completions at Neptune Energy Park and Kingfisher Boulevard.
- 6.14 This compares to annual figures of 12,600 sq m between 1994 and 1998. Warehousing new build has also seen a long-term decline, from 9,400 sq m per year from 1994-1998 down to 5,800 sq m between 2004 and 2008 and then 1,523 between 2009 - 2011.
- 6.15 Office new build in Newcastle has increased significantly since 1994, rising from 11,700 sq m per year between 1994 and 1998, 52,000 sq m per year between 2004 and 2008 and then 49,327 sq m between 2009 - 2011. However, it should be noted that using new build to assess gross demand takes no account of the amount of second-hand floor space that is made available during a period, as a result of

business relocations, closures and consolidation. For example, a number of the larger office schemes developed in Newcastle since 2003 have come in the public sector or have been relocations from existing sites, including 78,000 sq m of space for the DSS (at Benton Park View) in 2003, 40,000 sq m of space for Sage in 2004 and 30,000 sq m for the Inland Revenue in 2005.

- 6.16 Since 2005, the annual space for office new build in Newcastle has fallen back – for example, in 2008 it was 30,000 sq m. This trend is in line with ONS data on total floor space in the area, which suggest that the amount of total office floor space in the area peaked in 2004, before dropping slightly and remaining fairly static up to 2008 before dropping off slightly to 2011 during the recession.
- 6.17 By looking at trends over a particular timeframe, these annual rates of new build provide a useful indication of the likely levels of new build expected to accommodate all requirements, including new businesses, relocations and expansions. However, it does not necessarily directly reflect the net change in the amount of floor space required once you have taken into account space that is already occupied or available.
- 6.18 From a strategic context, in order to assess whether more, or less, employment land is required in the future it is important to assess the net level of demand for land – taking into account the fact that some sectors of the economy may require less land in the future. Gross demand can be used to assess the requirement for frictional demand, ie the volume of land to accommodate the movement of businesses into and out of the area.
- 6.19 The land requirements resulting from the average completions can be used using the same methodology as the forecasts, as indicated in figure 33 below.

Figure 33: Average annual land take-up extrapolated from completions

Land Change (Ha) Sector	Total Completions				
	1994 - 1998	1999 – 2003	2004 - 2008	2009 - 2011	
Warehousing	2	2	1	0	6
Office	1	5	7	6	19
Industrial	3	2	2	6	13
Total	7	9	10	12	37

Development Rates: Net Take-Up

- 6.20 Analysis of the take up of commercial office/industrial floorspace in Newcastle indicates that in the twelve years since 2000, a total of 83.30ha allocated/committed for employment land has been taken up for B1, B2, B8 use, which equates to approximately **6.95ha per annum**.
- 6.21 As with most areas, the net take-up of employment land in Newcastle has been lower than the gross figures discussed above.

Losses of Employment Land

- 6.22 Over the period between 2000 – 2010 a total of 38.41ha of employment land was lost to other uses, equating to 3.71ha per annum.

Available Employment Land

- 6.23 Newcastle's Annual Monitoring Report (2011/12) indicates that the City has an estimated 84.25ha gross (excluding the Airport) of available employment land. This gross figure is based upon the allocated employment sites within the 1998 Newcastle upon Tyne UDP and sites with planning permission since 2000. The figure includes the gross area of mixed use sites.

7. Creating a Picture of Future Requirements

Summary

Core Strategy and Urban Core Plan seeks to 'provide for our increased population anticipated to be at least 500,000 by 2030 and within this to increase our core working age population (20-64 age group) by around 9,000 from 2010 level to 300,400. The 2008 ONS Population Projections suggested that achieving that rate of growth was entirely possible without significant policy intervention and this is supported by the recent 2011 update although not by the 2010 projections. However, these population projections need to be considered alongside all other available evidence including our Economic Growth Projections.

Future job growth projections for Newcastle are substantial in the longer term. Newcastle has many advantages as an office, industrial and distribution location, with good strategic road accessibility; the Metro, East Coast Mainline, Newcastle International Airport; competitive business costs; access to a significant labour force; emerging strengths in growth sectors; and is the centre of the City Region.

Offices

Office jobs are forecast to grow up 9,000 or 19.7%, under the Long Term Recovery Scenario, 14,400 jobs or 30% under St Chads and 15,400 or 32.6% under Cambridge Econometrics Scenario to 2038.

We estimate an increase of between 14.0ha and 22.0ha of net office land requirements up to 2038, depending on development densities.

The forecast demand is compared with estimates of land supply. Newcastle City Council data estimates there is the potential for around 40.13ha of office land (12.61ha in the Urban Core). This comprises allocations from the UDP, windfall sites and mixed use redevelopment sites.

An initial balance suggests that there is an oversupply of land available for office development up to 2038 of between 18.13ha and 26.13ha.

In accordance with the sequential test, Urban Core sites will be brought forward for development as a priority.

Industrial / Warehousing

Under the Long Term Recovery Scenario, industrial jobs are forecast to decline by – 4,900 or -40.8% and warehousing employment is forecast to grow by 2.8% an increase of 100 jobs.

Using employment land forecasts as a proxy for forecast demand gives estimate of a net decline of between -7ha and -42.0ha of industrial land and growth of between 2ha and 5ha of warehousing land to 2038.

An initial comparison of net supply (66.71ha) against demand for industrial and warehousing land suggests there is an over supply against all scenarios.

As with offices, there will be a requirement for some development land to allow the market to function effectively and to allow for flexibility and choice in the market for new companies wishing to take up more land and for existing companies wishing to expand.

The balance above does not take into account any changing circumstances or requirements of existing companies. For example, whilst industrial employment is forecast to decline over the plan period, existing companies may be changing their production techniques. This may result in fewer employees required for the same processes due to increase automation processes. However, this does not necessarily mean less land will be required; space may be required by these increased automation processes. This could serve to increase or stabilise land requirements for existing companies.

Should a large inward investor want to locate in Newcastle, or should an existing large employer be looking for expansion or relocation, the most suitable site, in the short term would be Newburn Riverside if still available and in the longer term would be Newcastle International Airport Southside Expansion site.

Introduction

- 7.1 This section seeks to quantify future requirements for employment land using a range of complimentary approaches. It is intended to meet the requirements of Stage 2 of the approach outlined in the Government's ELR 'brown book'.
- 7.2 This section attempts to assess the projected demand for employment land likely to be required in Newcastle over the plan period and also 25 years hence from the likely date of adoption.
- 7.3 To estimate the broad scale and type of employment land required, a number of different indicators and factors have been considered. The principal approaches most commonly used when assessing future employment land needs are based on:
- Forecasts of employment growth in the main B class sectors;
 - Projecting forward past take-up trends of employment land, with adjustments (if necessary) to reflect changing economic conditions;
 - Considering population forecasts and future growth of local labour supply and the amount of jobs and employment space that this can support.
- 7.4 After analysing and coming to a view as to the most appropriate scenario to plan for, jobs growth numbers have been translated into floorspace and land requirements. These are then compared with developments in the pipeline to give an outstanding requirement for the plan period.

Factors affecting Future Employment Space Needs

- 7.5 In accordance with the guidance this study employs a multi-stranded approach to forecasting future land requirements. This is in recognition of the limitations

associated with each method and aims to provide a well rounded analysis and understanding of future requirements across Newcastle.

- 7.6 Trends in the national economy are a significant factor affecting future demand for employment space. The UK economy officially entered into a “double-dip” recession in May 2012 for the first time since the 1970s. Since that date growth registered by the UK has continued to fluctuate. As yet, there is no agreement as to when we are likely to see a recovery.
- 7.7 While this study estimates employment space requirements over a 25 year period, over which short term fluctuations should even out, the past development rates assessed do not reflect this degree of slowdown and may need to be adjusted to reflect the future adverse outlook.
- 7.8 Levels of new business start ups provide an indication of the number of new firms starting up or expanding in the City, and this will influence the amount and type of space required in the future. The number of VAT registered firms in Newcastle rose by a modest 16% (5,040 to 5,840) between 1994 and 2008, falling below Tyne and Wear (23%) and Great Britain (26%). This indicates that Newcastle’s economy benefits from a modest entrepreneurial culture.
- 7.9 The need to replace land or premises lost (or released) to other uses to maintain the level of the current stock of employment space has been considered. Since 2000/01, there has been an average loss of approximately 3.71ha (per annum) of employment land to other uses. Much of this is in small sites and there is a need to ensure adequate space exists for the relocation of displaced firms.
- 7.10 Vacancy levels and floorspace availability provide another indicator of the balance between current supply and demand for employment floorspace. A typical vacancy rate in a normal market would be around 9-10% to allow for the movement and expansion of firms and a choice of locations. Evidence suggests that while vacancy levels for industrial properties in the City currently stand at 3% which is a healthy rate, there is a modest under-supply. Office vacancy rates currently stand at 23% for units and 19% for floorspace, which is very high and is an indication of over-supply. It is anticipated that this is a short term position which will be reversed when the economic climate improves and the office market returns. It is also important to note that behind every figure there is a story and it is arguable as to whether this ‘vacant’ floorspace is actually suitable / attractive for modern office demands. Much of the vacant floorspace is secondary in terms of location and quality and much of it has been vacant for a long time (ie Grainger Town) and will continue to be vacant for the foreseeable future.
- 7.11 Newcastle is important as an employment opportunity to the rest of Tyne and Wear with 88,700 in commuters and just 31,500 out-commuters (2001 Census). As such, Newcastle is considered to be well-contained, however there is a need to maintain the supply of good quality jobs available locally to prevent out-commuting increases in the future.
- 7.12 Other factors which could generate moderate future levels of employment space include the growing trend to relocate certain business operations to low-cost locations overseas ‘off-shoring’. The industries with the highest potential for ‘off-shoring’ are communications, banking and some business services of which

Newcastle is well represented. The City also has a lower representation of 'knowledge based industries'. In addition, industrial firms are tending to move manufacturing operations to lower cost countries while maintaining UK distribution functions. This is unlikely to have a high impact on employment space needs in Newcastle, given manufacturing has already fallen back.

- 7.13 'Smart' or 'landless' growth could achieve economic growth and reduce the amount of additional employment land needed. This could reflect increased automation, increase floorspace densities/plot ratios, labour productivity improvements, hot-desking, working from home, or more overtime working by current staff. A shift from industrial to higher density office based jobs could reduce land needs but this also implies a need for higher value jobs and skills.
- 7.14 Competition to economic growth in Newcastle from surrounding districts and other regional centres such as Leeds and Manchester could also constrain future demand and hence the scale of employment land provision. Out-of-town developments in North Tyneside e.g. Cobalt and Quorum could compete for larger office or industrial relocations.

Growth Scenarios

A. Job Forecasts Model

Methodology

2010 ELR Scenario Modelling

- 7.15 To help inform the development of the North East Regional Spatial Strategy, CEBR were commissioned to model a range of economic growth scenarios for the Region:
- Bronze Scenario: Economic growth of 2.3% per annum;
 - Bronze/Silver 2 Scenario: Economic growth of 2.8% per annum (RSS preferred scenario).
- 7.16 In line with the method used for RSS and the Gateshead Employment Land Study, DTZ commissioned Experian Business Strategies to develop tailored scenarios for Newcastle based upon the economic growth assumptions that underpin the Gold, Bronze/Silver and Bronze scenarios developed by CEBR, and a new economic scenario factoring in the likely impacts of the current recession. The forecasts produced for Newcastle differ slightly to those calculated for Gateshead:
- for Gateshead, five scenarios were produced – Gold, Bronze/Silver, Bronze, a baseline position and a "severe recession" scenario. Each scenario is based on Experian's spring forecast data (July 2009);
 - for Newcastle, four scenarios were originally produced by Experian – Gold, Bronze/Silver, Bronze and a Public Sector Contraction scenario (which has similar assumptions to Gateshead's baseline scenario). Each scenario is based on Experian's summer forecast data (July 2009), which incorporate a much more severe recession than the spring forecast data. Taking this into account,

a “severe recession” scenario was therefore not produced for Newcastle. Following feedback received at a stakeholder workshop in December 2009, a fifth scenario (called ‘Long Term Recovery’) was also developed and further detail on this is provided below.

7.17 The forecasts covered the period 2008-2037 to ensure consistency with the timeframe used for the Gateshead Employment Land Study. In addition, the forecasts look at a longer period than that covered in the Core Strategy and Urban Core Plan, which runs up to 2030 (where relevant, figures are provided for 2038 as well):

- **Public Sector Contraction Scenario:** Factoring in the potential impacts of the economic downturn to forecast how Newcastle may be affected in terms of employment change by sector;
- **Bronze Scenario:** Assumes an average annual growth rate of 2.3%. As noted in the Technical Background Paper to the North East Regional Spatial Strategy, this scenario requires an improved participation rate, labour productivity improvement which is 3.0% higher than the baseline figure and a shift in the industry mix to one that is much closer to the national position. However, it is important to note here that the recession means that annual growth rates are likely to be lower than when the Bronze scenario (and the Bronze/Silver and Gold scenarios) was developed;
- **Bronze/Silver Scenario:** Assumes an average annual growth rate of 2.8%. This scenario would require a higher increase in the participation rate, in addition to a larger rise in labour productivity;
- **Gold Scenario:** This is the most optimistic scenario and assumes an average annual growth rate of 4.9%, which would require a significant increase in productivity up to 2037;
- **Long Term Recovery Scenario:** Following on from a workshop held in Newcastle in December 2009 to discuss the interim findings, a fifth scenario was developed – this takes the employment forecasts from 2008-2013 from the Public Sector Contraction scenario and then applies the growth rates from the Bronze/Silver scenario to cover the period 2013-2037. This helps the forecasts to be more consistent with the North East Regional Spatial Strategy, which uses the Bronze/Silver scenario to identify future requirements. Called the ‘Long Term Recovery Scenario’, it factors in the continuing impact of the economic downturn and then looks at the implications in terms of a recovery in the long term for Newcastle – driven by increasing employment in office-based occupations.

7.18 The scenarios outlined above are based on different assumptions about sectoral trends, meaning that the subsequent employment forecasts and land requirements have quite significant variations. For example:

- the Bronze, Bronze/Silver and Gold scenarios focus on a shift away from industrial employment to a more business services-driven economy. This means that while office-based jobs may increase in the future, less land will be needed because offices require less space than manufacturing facilities;

- in contrast, the Public Sector Contraction scenario considers future employment change in Newcastle, assuming the majority of change actually takes place in the public sector and the industrial sector experiences a slight recovery in the long term.

2012 ELR Updated Scenarios

- 7.19 Following the publication of the original Newcastle ELR in 2010, the Planning teams at Newcastle City and Gateshead Borough Council decided to commission new economic population projections capable of providing a consistent and up-to-date set of projections to inform the Core Strategy and Urban Core Plan. It was considered that given the prolonged economic slowdown, the previous CEBR forecasts were out-of-date. With the exception of the 'Long Term Recovery' Scenario, which factored in the economic downturn, none of these earlier scenarios were taken forward in the updated employment land modelling work.
- 7.20 Employment projections were purchased by the two authorities from Cambridge Econometrics (CE) in summer 2011. The annual data covered the 50 year period from 1981-2030 inclusive, at three different geographic areas: the administrative areas of Newcastle and Gateshead Councils and the North East region.
- 7.21 St Chad's College (Durham University) were subsequently appointed to analyse the CE projections alongside the latest official population projections from the ONS. Using modelling techniques, the compatibility of these two sets of projections was analysed.
- 7.22 Between 1981 and 2010 employment in both Newcastle and Gateshead grew at a faster rate than the North East, and employment in Gateshead grew at a faster rate than Newcastle. Accordingly, GVA in Gateshead grew at a much faster rate than Newcastle and the North East over this period.
- 7.23 There have been different rates of growth and decline for employment sectors in Newcastle and Gateshead. Business and financial services, and public services grew faster in Gateshead (though in real terms, Newcastle increased by larger numbers of jobs). Retail distribution and transport, and construction shrank in Newcastle but grew in Gateshead. Manufacturing shrunk more in Newcastle than it did in Gateshead.
- 7.24 Gateshead's higher rate of employment and GVA growth was not reflected in Cambridge Econometrics projections when compared to growth in the North East, or in Newcastle. To better reflect Gateshead's historic growth rates, and the current split of employment between Newcastle and Gateshead an 'alternative' scenario was developed by St Chad's. This projection retained the overall level of growth identified by CE, but better reflects Gateshead's current employment share (36% of total jobs in Newcastle and Gateshead).
- 7.25 Both Newcastle and Gateshead are projected to increase employment by 7% - a total of roughly 22,000 additional jobs between 2010 and 2030 (around 8,000 in Gateshead, and 14,000 in Newcastle). The largest increase will be in the business and financial services sector group, and in particular within professional services.

- 7.26 In summary, the following three scenarios have been used to underpin the quantitative econometric modelling:
1. Long Term Recovery;
 2. Cambridge Econometrics Baseline Scenario;
 3. St Chad's Scenario.
- 7.27 In order to translate the resultant job forecasts into estimates of potential employment space, it was necessary to allocate the level of employment change forecast for office, industrial, and wholesale/distribution uses as follows:
- The office floorspace requirement is related to job growth/decline in the financial and business service sectors;
 - The industrial floorspace requirement is related to job growth/decline in the manufacturing sectors; and
 - The wholesale/distribution floorspace requirement is related to job growth/decline in the three SIC sectors of wholesaling, transport and communications for the Experian forecasts (distribution, land transport and communications for the CE/St Chad's forecasts).
- 7.28 In order to translate the resulting figures into employment land projections, employment densities (as recommended in the HCA Employment Densities Guide 2nd Edition 2010) and plot ratios by use class were then applied to the job change figures to translate these into employment land projections.
- 7.29 Both the Experian forecasts and the CE/St Chad's forecasts provide head count figures (ie total employment), rather than Full Time Equivalents [FTEs], with the latter required for conversion purposes. As such, it was necessary to translate the head count figures generated by the econometric forecasters into FTEs. It is generally accepted that 1 FTE equals one full time job or two part time jobs. In order to translate the jobs forecasts into estimates of potential employment floorspace, it was necessary to allocate the level of employment change for forecast for office, industrial and wholesale/distribution uses as follows:
- Industrial (General Industrial Buildings): gross internal floor space 36 sq m per employee;
 - Warehousing (General warehousing): gross internal floor space of 70 sq m per employee;
 - Offices (General Offices): gross internal floor space of 12 sq m per employee.
- 7.30 It has been assumed that a gross area of 1ha is required to develop 4,000 sq m of out-of-town office, industrial or warehousing or distribution space (equal to a plot ratio of 40%). For city centre office space, empirical evidence suggests that plot ratios of 300% have been achieved. This assumes an office building of 6 storeys in height, with 360% plot coverage. Please refer to the methodology in Appendix J.

7.31 The demand projections generated via this employment forecasting method represent a net future requirement for employment levels and do not take into account any future losses to non-employment uses. It is therefore necessary to adjust these figures in order to reconcile them against gross projections generated by historic take up rates.

Employment Growth

7.32 In accordance with the guidance this study adopts a multi-stranded approach to forecasting future land requirements. This is in recognition of the following limitations associated with each method and follows the approach used to inform the Gateshead Employment Land Review.

- trend based estimates projecting forward historic growth patterns;
- forecasts do not reflect job growth across the rest of the economy e.g. in sectors such as retail, health and education;
- forecasts tend to be more robust at regional and national scales than at the local economy level, but can indicate the broad scale and direction of economic growth in different sectors and provide some guidance to assess future land requirements;
- not always a clear cut relationship between employment change and employment land needs. Additional employment space can be needed even if employment itself is falling, and conversely less land can be needed if employment is growing.

7.33 The St Chad's Update 2012 econometric projections for Newcastle indicate that overall, there will be moderate growth in employment in 30 defined sectors for the period 2010-2030 of almost 14,000 jobs. This growth, however masks significant decline in a number of existing sectors notably: Retailing (-1.2); Public Administration and Defence (- 0.8) and Education (-0.8). These losses are outweighed by gains in Professional Services (7.2), Misc. Services (4.7), Banking and Finance (2.1) and Hotels and Catering (1.8).

Figure 34: Projected Employment Change 2010 – 2030/2038, against all sectors

	2010		2030		2038		
	Employment	Cambridge Economics	St Chads	Long Term Recovery	Cambridge Economics	St Chads	Long Term Recovery
1 Agriculture etc	1.2	-0.4	-0.4	-0.4	-0.5	-0.5	-0.5
2 Coal	0	0	0	0	0	0	0
3 Oil & Gas etc	0	0	0	0	0	0	0
4 Other Mining	0	0	0	0	0	0	0
5 Food, Drink & Tob.	1.2	-0.5	-0.5	-0.5	-0.6	-0.6	-0.6
6 Text., Cloth. & Leather	0.3	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
7 Wood & Paper	0.4	-0.1	-0.1	-0.1	-0.2	-0.2	-0.2
8 Printing & Publishing	1.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
9 Manuf. Fuels	0	0	0	0	0	0	0
10 Pharmaceuticals	0.5	0	0	0	0	0	0
11 Chemicals nes	0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
12 Rubber & Plastics	0.5	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
13 Non-Met. Min. Prods.	0.2	0	0	0	0	0	0
14 Basic Metals	0	0	0	0	0	0	0
15 Metal Goods	1.2	0	0	0	0	0	0
16 Mech. Engineering	2.5	0.1	0.1	0.1	0	0	0

	2010			2030			2038			
	Employment	Cambridge Economics	St Chads	Long Term Recovery	Cambridge Economics	St Chads	Long Term Recovery	Cambridge Economics	St Chads	Long Term Recovery
17 Electronics	0.3	0	0	0	0	0	0	0	0	0
18 Elec. Eng. & Instrum.	0.3	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
19 Motor Vehicles	0.6	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3
20 Oth. Transp. Equip.	0.1	0	0	0	0	0	0	0	0	0
21 Manuf. nes	0.9	0.1	0.1	0.1	0.3	0.3	0.3	0.3	0.3	0.3
22 Electricity	0.7	-0.3	-0.3	-0.3	-0.4	-0.4	-0.4	-0.4	-0.4	-0.4
23 Gas Supply	0	0	0	0	0	0	0	0	0	0
24 Water Supply	0	0	0	0	0	0	0	0	0	0
25 Construction	8.6	0.6	0.5	0.6	0.9	0.7	0.9	0.9	0.7	0.9
26 Distribution	4.1	0	0	0	0.3	0.2	0.3	0.3	0.2	0.3
27 Retailing	17.2	-1	-1.2	-1	-1.2	-1.5	-1.2	-1.2	-1.5	-1.2
28 Hotels & Catering	9.3	1.9	1.8	1.9	3	2.8	3	3	2.8	3
29 Land Transport etc	4	0.4	0.3	0.4	0.3	0.2	0.3	0.3	0.2	0.3
30 Water Transport	0	0	0	0	0	0	0	0	0	0
31 Air Transport	1	0.6	0.6	0.6	1.1	1.1	1.1	1.1	1.1	1.1
32 Communications	1.8	0	0	0	0	0	0	0	0	0
33 Banking & Finance	7.5	2.2	2.1	2.2	2.8	2.6	2.8	2.8	2.6	2.8
34 Insurance	0.5	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3
35 Computing Services	5.6	-0.4	-0.5	-0.4	-0.5	-0.6	-0.5	-0.5	-0.6	-0.5
36 Prof. Services	19.1	7.5	7.2	7.5	12.1	11.6	12.1	12.1	11.6	12.1
37 Other Bus. Services	14.6	0.3	0.1	0.3	0.7	0.5	0.7	0.7	0.5	0.7
38 Public Admin. & Def.	22.3	-0.6	-0.8	-0.6	0.1	-0.3	0.1	0.1	-0.3	0.1
39 Education	21.3	-0.6	-0.8	-0.6	0.4	0.1	0.4	0.4	0.1	0.4
40 Health & Social Work	32.2	1.7	1.3	1.7	4.4	3.8	4.4	4.4	3.8	4.4
41 Misc. Services	11.2	4.9	4.7	4.9	7	6.7	7	7	6.7	7
Total employment	192.4	16.3	13.9	16.3	29.9	26.3	29.9	29.9	26.3	29.9

Warehousing
Office
Industrial

7.34 Figure 35 sets out the level of net employment change forecast over the period 2010 – 2030/2038 for Newcastle under each four growth scenarios.

Figure 35: Level of net employment change against each scenario

Scenario	2010-2030	2010-38
	Total	Total
Long Term Recovery	16.3	29.9
Cambridge Econometrics	16.3	26.3
St Chad's	13.9	29.9

Source: DTZ

7.35 As might be expected, the total amount of net employment over the period 2008-2038 is strongest under the Experian Long Term Recovery Scenario, with a substantial increase of 16,300 to 2030 and almost 30,000 by 2038. The 20 year time horizon for this scenario is particularly stark when compared to the Cambridge Econometrics and St Chad's forecasts. This is partly due to the over optimistic recovery rates forecast previously – the Experian scenario suggests that employment growth would begin to recover as early as 2011, whereas the continued economic downturn suggests that the CE and St Chad's estimates of a much later return to employment growth (2014/15 respectively) appear more realistic.

- 7.36 The econometric forecasts are broadly consistent in terms of the sectors forecast to grow/decline, with only the scale of magnitude differing across the scenarios (to 2030), hence B1 office growth ranges from 4,800 employees to 9,800 employees, manufacturing set to decline further (ranging from – 800 to -4,300), whilst the B8 storage and distribution sectors are forecast to stay the same with 0 growth.
- 7.37 Figure 36 demonstrates the extent to which the economy will be particularly reliant on service rather than industrial based sectors.
- 7.38 Econometric forecasts can provide a useful starting point as to the likely future requirements for employment space, however some degree of caution needs to be applied due to the unpredictability of market circumstances and the considerable influence of external forecasts on the local economy. The starting point for this assessment represents a time when productivity in the economy had reached its lowest point, and hence the forecasts have had to factor in the impact of the recession while recognising that the economy will recover in the medium to long term.
- 7.39 These adjusted job forecasts were subsequently turned into employment land requirements through the application of the standard employment densities, vacancy rates and plot ratios, using the methodology set out below in paragraph 7.42.
- 7.40 For Newcastle, this generates a net employment land requirement of between 0.3ha and 7.8ha for the period 2010 – 2030 and 9.0ha and 21.0ha for the period 2010 - 2038 as illustrated in the below table.

Figure 36: Employment Land Requirement (ha)

Scenario		Office	Industrial	Storage/ Distribution	Total
Long Term Recovery	2010 - 2030	7.2	-6.9	0.0	0.3
	2010 - 2038	14.0	-7.0	2.0	9.0
Cambridge Econometrics	2010 - 2030	14.0	- 7.0	0.0	7.0
	2010 - 2038	22.0	- 7.0	3.0	18.0
St Chad's	2010 - 2030	14.7	-6.9	0.0	7.8
	2010 - 2038	23.0	-7.0	5.0	21.0

Source: DTZ Research

Past Take-up Rates

- 7.41 Analysis of the take up of commercial office/industrial floorspace in Newcastle indicates that in the twelve years since 2000, a total of 83.30ha allocated/ committed for employment land has been taken up for B1, B2, B8 use, which equates to approximately **6.95ha per annum**.
- 7.42 At a very basic level, projecting the employment land take up forward (6.95ha per annum) to 2030/38 would suggest a requirement for around 139.0ha/194.60ha of employment land. It is acknowledged that this presumption is based on a limited data source and does not factor in the likely impacts of a prolonged recession, which would significantly reduce take-up in the short to medium term.

7.43 It is arguable as to whether the very high take up levels of the past decade will continue over the plan period for a combination of reasons including:

- move towards a more Business Services orientated economy;
- restructuring of traditional industries with the potential for the re-use of older 'brownfield' sites;
- contribution of unsustainable public sector jobs growth unlikely to be repeated;
- long term impacts of the recession and the likely reduction in the public sector spending available to deliver complex brownfield sites;
- need to consider alternative uses for existing B-class allocations, notably waste and recycling.

7.44 The Council's view is that justification could be made for take-up rates to reduce by a third in years to come (equating to 4.63ha per annum). This would have the result of decreasing the long term gross take up scenario to 93.0ha/129.7ha

Gross Employment Space / Land Projections

7.45 It is necessary to adjust net employment land projections in order to reconcile them against gross projections generated by analysing historic take up and losses for planning purposes.

7.46 Analysing recent losses of B1, B2, B8 employment land indicates that over the ten year period from 2000³, some 40.98 ha was lost to other uses, at a rate of 4.09ha per annum. Over the 5 year period from 2005 losses fell back to 3.71ha per annum. If the level of short term losses were to continue to 2030/2038, some 74.2ha / 103.88ha would be needed to maintain the current stock of employment stock. Notably, much of this employment loss is lost to non-employment land uses for example residential rather than retail use.

7.47 In determining whether this recent trend of losses is likely to continue, a number of factors were considered:

- impacts of the recession, reducing development pressure for redevelopment of employment sites for alternative uses;
- whether the remaining allocated employment sites have particular constraints likely to deter non-employment uses (ie contamination); and
- exceptional developments in past losses data that are unlikely to be repeated in the future (ie Kenton Bar employment allocation redeveloped as housing).

7.48 Other factors suggest that the rate of employment land lost to alternative uses may increase include:

³ This timeframe has been used to limit the number of years of stalled development included in the long and short term average.

- further losses to the City's employment land portfolio may continue, given that the SHLAA has identified as number of employment allocations / existing industrial sites that might be better suited to residential / mixed uses;
- agents were of the view that although many of the 'vulnerable' employment sites situated in residential areas had been developed for alternative uses in the boom years, the remaining portfolio still included a number of sites attractive to the house building industry;
- national planning policy explicitly encourages the removal of protection for existing employment sites for which there is no reasonable prospect for economic development. The NPPF also encourages the conversion of offices to residential provided there are not strong economic reasons why it would be inappropriate;
- the past losses include a substantial period of time where the economy has stalled;
- there is a strong argument that not all losses of employment land should necessarily be replaced or reflected in an increased gross land requirement. This would be on the basis that Newcastle's stock of employment land contains some older sites less likely to meet future needs and is of a scale that reflects past industrial patterns, rather than the amounts of land needed in the future.

7.49 In light of the above, it is therefore suggested that the short term – past rate of 3.71ha per annum losses, is a justifiable way forward. Although, this should be monitored by the Council over the next few years and adjusted as necessary.

7.50 Newcastle City Council do not breakdown the type of employment land lost beyond B class, hence it is not possible to directly translate future losses into B1/B2/B8.

7.51 To summarise, by factoring in the likely net losses of employment land to job-forecast-based net projections presented above would generate **a gross employment land requirement of between 74.5ha and 82.0ha for the period 2010-2030 and between 112.88ha and 124.88ha for the period 2010-2038.**

Adjusting the Margin of Choice

7.52 Where demand for employment land is likely to decrease, there should always be new land coming forward to reduce further contraction of the market. It is therefore desirable to allocate more land than is likely to taken up, as it is questionable whether some land will come forward for development. This is particularly the case for those sites which have been carried over from past plan periods and for those with significant obstacles to delivery.

7.53 It is standard procedure when carrying out an ELR to build in a margin of choice, to allow for a degree of flexibility in the allocations by applying a stated factor in the demand calculations. This 'overage' on top of the initial estimate of employment space is helpful for the following reasons:

- margin for error given the relative uncertainties of the forecasting process;
- choice of sites for occupiers and developers;

- to facilitate 'churn' in the market through healthy vacancy levels;
- to provide flexibility / decanting space while older premises are being redeveloped and new sites are coming forward; and
- to allow for unforeseen losses, such as allocated sites not coming forward and some redundant industrial sites not being suited for new employment uses.

7.54 A conservative margin of choice was factored in to equal 2 years worth of past take up. This is considered an appropriate margin, on the basis that allows some flexibility in terms of planning permission being granted and implemented and would reduce the risk of oversupply of employment land in the City.

7.55 Consequently, by including an allowance for the replacement of losses and factoring in two years of take up (based on long term trends) to allow for a margin of choice, this results in **a gross total requirement of between 83.77ha and 91.27ha for the period 2010-2030 and 122.15ha and 134.15ha for the period 2010-2038.**

7.56 The steps are summarised in Figure 37 below:

Figure 37: Methodology for Defining Gross Requirement

	Net Requirement	Flexibility Margin (2 years of take up)	Allowance for losses (3.71ha per annum)	Gross Employment Land Requirements
2010 -2030	0.3 – 7.8ha	9.27ha	74.2	83.77 – 91.27ha
2010 – 2038	9 – 21ha	9.27ha	103.88	122.15 -134.15ha

Source: NCC Analysis

7.57 The full breakdown is illustrated in Figure 38.

Figure 38: Anticipated Breakdown of Gross Employment Land Requirement by Scenario, 2010-2030/38

Scenario		Office	Industrial	Storage/ Distribution	Total
Long Term Recovery	2010 - 2030	7.2	-6.9	0.0	0.3
	2010 - 2038	14.0	-7.0	2.0	9.0
Cambridge Econometrics	2010 - 2030	14.0	- 7.0	0.0	7.0
	2010 - 2038	22.0	- 7.0	3.0	18.0
St Chad's	2010 - 2038	14.7	-6.9	0.0	7.8
	2010 - 2038	23.0	-7.0	5.0	21.0

Source: DTZ Research

Figure 39: Gross Land Comparisons 2010-2030/38

		B1	B2	B8	Total
Long Term Recovery Scenario	2010 – 2030 (net)	7.2	-6.9	0.0	0.3
	2010 – 2030 (gross)	-	-	-	74.5
	+ flexibility factor	-	-	-	83.77
	2010 – 2038 (net)	14.0	7.0	2.0	9.0
	2010 – 2038 (gross)	-	-	-	112.88
	+ flexibility factor	-	-	-	122.15
Cambridge Econometrics	2010 – 2030 (net)	14.0	-7.0	0.0	7.0
	2010 – 2030 (gross)	-	-	-	81.2
	+ flexibility factor	-	-	-	90.47
	2010 – 2038 (net)	22.0	-7.0	3.0	18.0
	2010 – 2038 (gross)	-	-	-	121.88
	+ flexibility factor	-	-	-	131.15
St Chad's	2010 – 2030 (net)	14.7	-6.9	0.0	7.8
	2010 – 2030 (gross)	-	-	-	82.0
	+ flexibility factor	-	-	-	91.27
	2010 – 2038 (net)	23.0	-7.0	5.0	21.0
	2010 – 2038 (gross)	-	-	-	124.88
	+ flexibility factor	-	-	-	134.15
Take Up Projections	2010 – 2030 (net)	-	-	-	92.6
	2010 – 2030 (gross)	-	-	-	166.80
	+ flexibility factor	-	-	-	176.07
	2010 – 2038 (net)	-	-	-	129.64
	2010 – 2038 (gross)	-	-	-	233.52
	+ flexibility factor	-	-	-	242.79

Source: NCC Analysis

7.58 In summary, the range of indicative total gross land requirements to 2030/2038, factoring in a 2 year margin of choice, results in the following range of demand projections:

Long Term Recovery:	83.77 / 122.15ha
Cambridge Econometrics:	90.47 / 131.15ha
St Chad's:	91.27 / 134.15ha

Sense Check

- 7.59 The next stage of the process was to 'sense check' these estimates by comparisons with differing approaches, past trends and previous employment land allocations in Newcastle.
- 7.60 The level of future demand for B –use class projections projected by the employment-based forecasts, significantly differs from the figures suggested by the application of past take up rates. The projections are largely trend-based; in particular, the Cambridge Econometrics/St Chad's scenarios reflect the position at the 'bottom' of the market. The past take up rates have for the most part been recorded during an unprecedented boom in the commercial market nationally, and reflect the 'predict and provide' approach formerly used to inform ELRs. In reality the actual performance of Newcastle's economy is likely to sit somewhere between the econometric projections and past take up. It is therefore important to undertake a series of sense checks:
- a) The three econometric model scenarios estimate a minimum net requirement, ranging from 0.30ha to 7.8ha. Given that Newcastle's Annual Monitoring Report (2011/12) indicates that the City has an estimated 84.25ha of committed employment land recorded as being available in Newcastle, (excluding the Airport), based on UDP allocations, this would suggest substantial de-allocations.
 - b) The estimates of land requirements are highly sensitive to the assumptions used. The jobs/floorspace and plot ratios adopted here reflected those in the ODPM guidance. At present, it is assumed that the plot ratio of 40% is applied to out-of-centre office space, industrial space and warehousing with a plot ratio of 300% for city centre offices. If a flat rate of 40% was applied to all developments, this would mean more land would be needed, however given the NPPF requirement for sequential testing, it is considered reasonable to assume that the majority of future B1 development in the City will be in the Urban Core at reasonably high plot densities.
 - c) The 2 year 'margin of choice' would ordinarily be seen as reasonable, particularly in light of current market conditions which necessitate the need to provide 'oven-ready' sites to prevent occupiers from moving beyond the City when searching for appropriate sites. Conversely there is an argument that by planning for a 28 year time frame, we are already over-providing employment land, given that the Core Strategy and Urban Core Plan will only have a 15 year timeframe from the time of adoption. By providing a 'margin of choice' on top of the 28 year timeframe, we will in effect be double counting. It is therefore recommended that the range of forecasts of gross employment space requirements should exclude a further 2 year margin of choice as this would result in excessive over-provision of land for the City.
 - d) DTZ took a slightly different view to establishing the range of employment land required when carrying out the Newcastle Property Market Overview and Demand Assessment 2012. They advise that in planning for the future employment needs of the Newcastle area, that the projected take up level should be regarded as the upper limit of the amount of land required to 2038. The mid period take up level suggests a figure of 9 ha (gross) per annum of

employment land take up, which equates to a gross land requirement of 180ha to 2030 and 252ha to 2038. They also advise that, at any time, there should also be five years “supply of deliverable sites” equating to 45ha in order to meet market requirements.

- e) As, outlined above there is a very strong argument that not all losses of employment land should necessarily be replaced or reflected in an increased gross land requirement. We would therefore take the view that past take up rates should be regarded as the upper limit of the land required to 2030/38. Chapter 8 considers our Established Portfolio of Employment Sites, and the view has been taken that where sites are no longer ‘fit for purpose’ or operate for the use they were intended that their de-allocation will not be reflected in an increased gross land requirement.

7.61 In summary, it is recommended that the range of forecasts should exclude a further 2 year margin of choice, that average gross take-up will reduce by a third in years to come (assumed as 6ha per annum) and that the adjusted past take up should be regarded as the upper limit of the land required to 2030/38. The adjusted range, is therefore as follows:

Long Term Recovery:	74.5/112.88ha
Cambridge Econometrics:	81.2/121.88ha
St Chad’s:	82.0/124.88ha
Take Up Projections:	166.80/233.52ha
DTZ with adjusted Take-Up:	45 to 120/168ha

7.62 In conclusion, this report recommends, given all the factors discussed above that a range of between **45ha (rolling 5 year supply of deliverable sites) and 168.00ha** of employment land is secured for the City to 2038. The necessary balance between the supply and demand for employment sites is discussed in detail in Section 9.

8. Reviewing our Established Portfolio of Employment Sites

Summary

In summary, the following conclusions can be drawn:

- Newcastle City Council currently has around 436.27ha of committed employment land (based on extant UDP allocations);
- Of this land, some 84.73ha is recommended for deletion following redevelopment to other uses, notably Kenton Bar, Rainbow Workshop, Bakery (Ponteland Road), Pooley Road, St Silas and Heaton Junction. A further 154.10ha are recommended for deletion but are anticipated to remain in employment use over much if not all of the plan period; and
- These losses of employment will not be replaced or reflected in an increased gross land requirement. This is on the basis that Newcastle's stock of employment land contains some older sites less likely to meet future needs and is of a scale that reflects past industrial patterns, rather than the amounts of land needed in the future.

Introduction

- 8.1 A key requirement of the Employment Land Review is to understand the nature, quantum and broad locations of 'available' employment land across Newcastle. In this stage, qualitative review of the City's main employment areas and sites was undertaken. This focussed mainly on the City's main office, industrial and warehousing areas to assess their continued suitability for employment use. This stage also involved identifying a portfolio of new sites with potential to meet the requirement of new employment land identified at the end of Stage 2.

Identifying sites for review

- 8.2 In accordance with Government guidance on carrying out employment land reviews, the sites identified for review were the B-Use Classes as defined in Use Class Order 1987 (as amended).
- 8.3 The supply of employment land in Newcastle consists of three components:
- committed employment sites: undeveloped allocated employment sites, along with sites with extant planning permission for employment use over and above a 0.25ha threshold;
 - existing employment sites: clusters of existing under-utilised sites; and
 - potential employment sites: derived from a number of sources; including a 'Call for Sites' exercise undertaken in August 2009.
- 8.4 A plan indicating Newcastle's future and planned offices sites can be found at Figure 41 and 42.

8.5 The City's employment needs and supply require consideration in greater detail. The government's Employment Land Reviews Guidance Note 2004 identifies general market segments and types of site. Allowing for some slight adjustment to fit Newcastle's character and its portfolio, (eg, use of the term "parks"), the current significant representation of market segments in Newcastle is broadly as follows:

Figure 40: Segmentation

Segment and Type of Site	Representation in Newcastle	Character Area
<p>Established or Potential Office Locations. Sites and premises, predominately in or on the edge of town and city centres, already recognised by the market as being capable of supporting pure office (or high technology R&D/business uses).</p>	<p>Newcastle Business Park; East Quayside; Central Business Park; emerging Discovery Quarter (eg Gallowgate/ St James Boulevard); Longbenton (Government complex); Regent Centre; Newburn Riverside.</p>	<p>Urban Core Neighbourhoods</p>
<p>High Quality Business Parks. These are likely to be sites, no less than 5ha but more often 20ha or more, already occupied by national or multi-national firms or likely to attract those occupiers. Key characteristics are quality of buildings and public realm and access to main transport networks. Likely to have significant pure office, high office content, manufacturing and R & D facilities. Includes 'Strategic' inward investment sites.</p>	<p>Newburn.</p>	<p>Neighbourhoods</p>
<p>Research and Technology/Science Parks. Usually office based developments, which are strongly branded and managed in association with academic and research institutions. They range from incubator units with well developed collective services, usually in highly urban locations with good public transport access to more extensive edge/out of town locations.</p>	<p>International Centre for Life; emerging Science Central, Discovery Quarter.</p>	<p>Urban Core</p>

<p>General Industrial/Business Areas. Coherent areas of land which are, in terms of environment, road access, location, parking and operating conditions, well suited for retention in industrial use. Often older, more established areas of land and buildings. A mix of ages, qualities and site/building size.</p>	<p>Airport Industrial Estate; Newburn; Scotswood Road corridor; Walker Riverside; various locations listed at UDP policies ED3.1, ED3.2.</p>	<p>Neighbourhoods</p>
<p>Incubator/SME Cluster Sites. Generally modern purpose built, serviced units.</p>	<p>16 Charlotte Square, City Centre; Ouseburn Regeneration Area; Benwell City West Business Park and Whitehouse road, Benwell; Walker Riverside.</p>	<p>Neighbourhoods</p>
<p>Specialised Freight Terminals eg aggregates, road, rail, wharves, and air. These will be sites specifically identified for either distribution or, in the case of airports, support services. Will include single use terminals eg aggregates.</p>	<p>Airfreight terminal, Southside, Newcastle Airport.</p>	<p>Neighbourhoods / Rural & Villages</p>
<p>Recycling/Environmental Industries Sites. Certain users require significant external storage. Many of these uses eg waste recycling plants can, if in modern premises and plant, occupy sites which are otherwise suitable for modern light industry and offices. There are issues of market and resident perceptions of these users. Some sites because of their environment (eg proximity to heavy industry, sewage treatment works etc) may not be marketable for high quality employment uses.</p>	<p>Benwell Waste Transfer Station Scotswood Road; Newcastle Resource Recovery Centre (formerly Byker Reclamation Plant) Walker Road; Sandhill Cottages green waste composting facility, Walbottle Road; Various private sector businesses, eg secondary aggregates, processing clinical waste, etc. (see Waste Technical Paper).</p>	<p>Neighbourhoods</p>

8.6 Having regard to existing and emerging needs, the above list may be modified to comprise the following main elements, using Use Classes Order categories:

1. **General employment land** for a wide range of uses: within industry - B2); light industry - B1c); storage and distribution - B8; sui generis uses with characteristics or mix of the above, including requirements for the city's offshore industries cluster, and waste management facilities.

2. **Offices: commercial, etc** - B1 a), principally City Centre mixed-use brownfield land, and business park locations.
 3. **Offices: research and development / high tech** - B1b) including Incubator/SME for research and development/ high tech, studios. This may be provided within 1, or 2, or within specific allocations.
 4. **General SME** start-up, managed workspace, and move on accommodation - B1b), B1c) in a range of sizes, and likely to be mainly provided on sites within 1, 2, and 3 above.
 5. **Airport related development** - B1, B2, B8, located within defined airport land.
- 8.7 Many individual sites will be previously developed land within a larger, established area, eg Walker Riverside. Most employment areas, which will need to be protected for employment uses, do not have any significant sites as such, but may be suitable for eventual refurbishment, redevelopment and / or intensification. It is therefore important to consider employment land and employment areas together, and to ensure correspondence and consistency of designations and uses proposed. Employment Protection Areas are considered further below.

Review of Allocated Economic Development, Office, Industrial and Warehousing Areas (ED1, ED3.1 and ED3.2)

- 8.8 A number of sites were identified in the Newcastle-upon-Tyne Unitary Development Plan 1998 under Policies ED1, ED3.1 and ED3.2, as the City's strategically-important stock of office, industrial and warehousing land. In total, 62 ED sites were reviewed, covering over 612.04ha of land. **Appendices A – H** should be read in conjunction with this section.

Figure 41a: Location of Proposed Employment Land - East

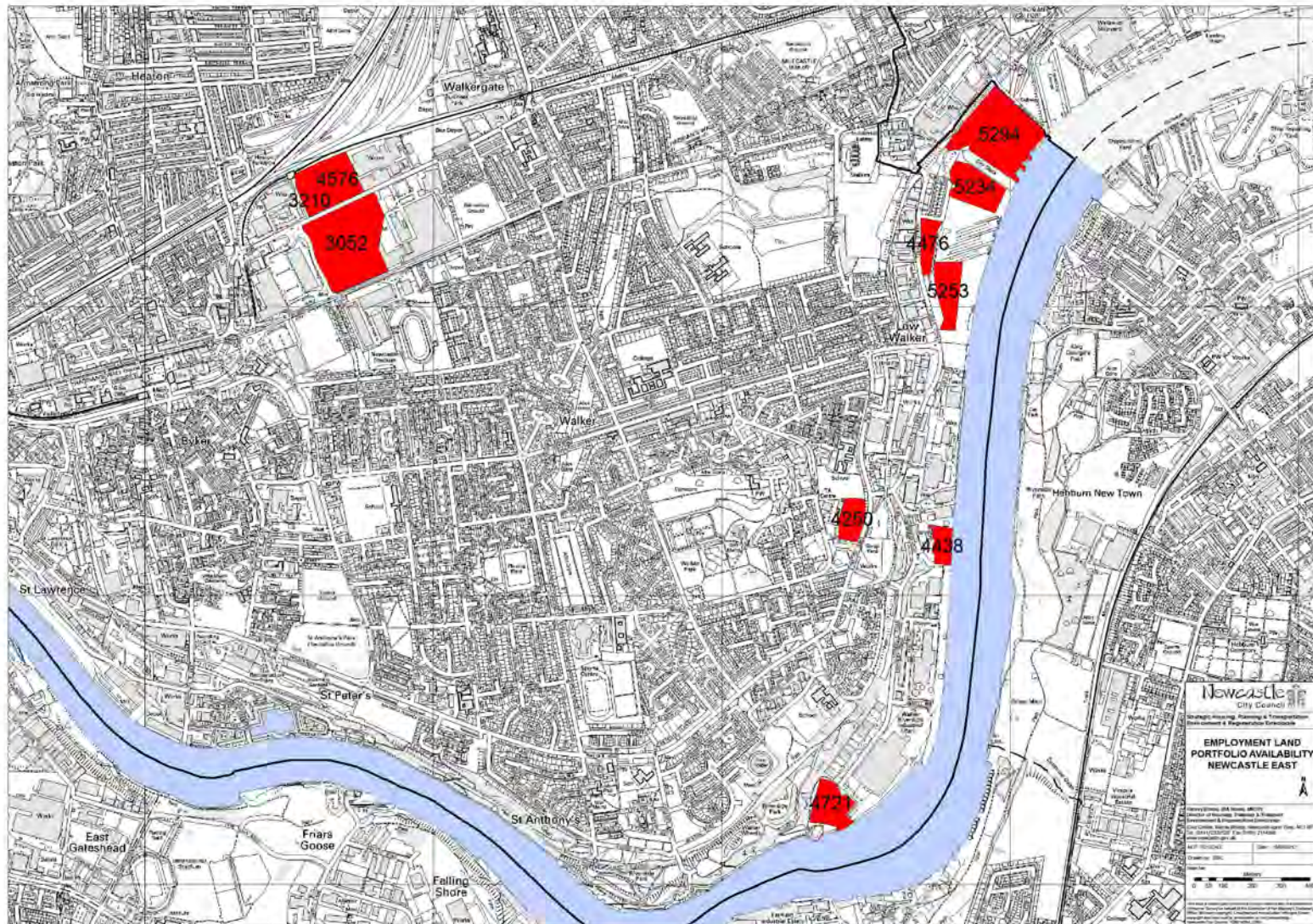


Figure 41b: Location of Proposed Employment Land - West

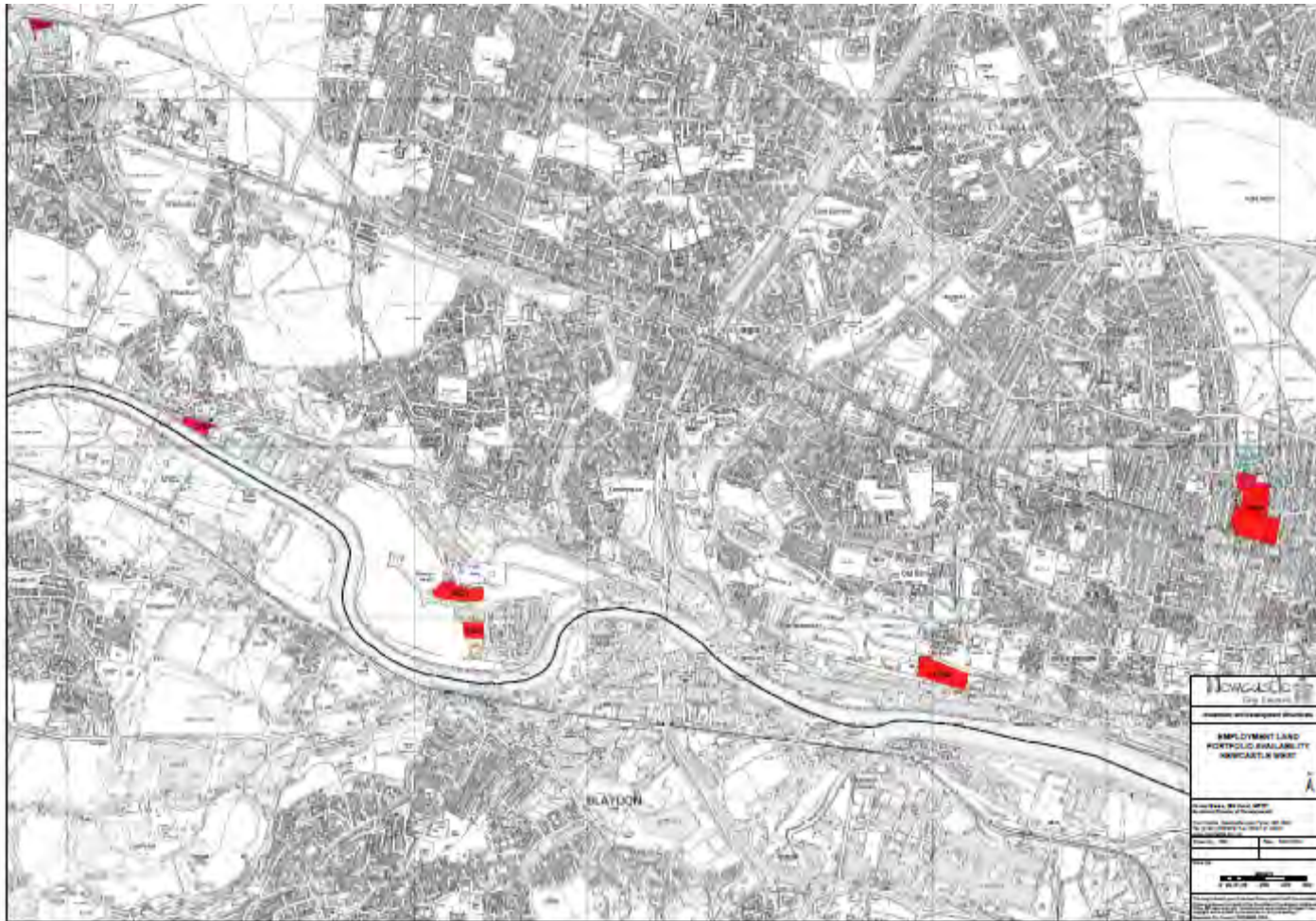


Figure 41c: Location of Proposed Employment Land - North

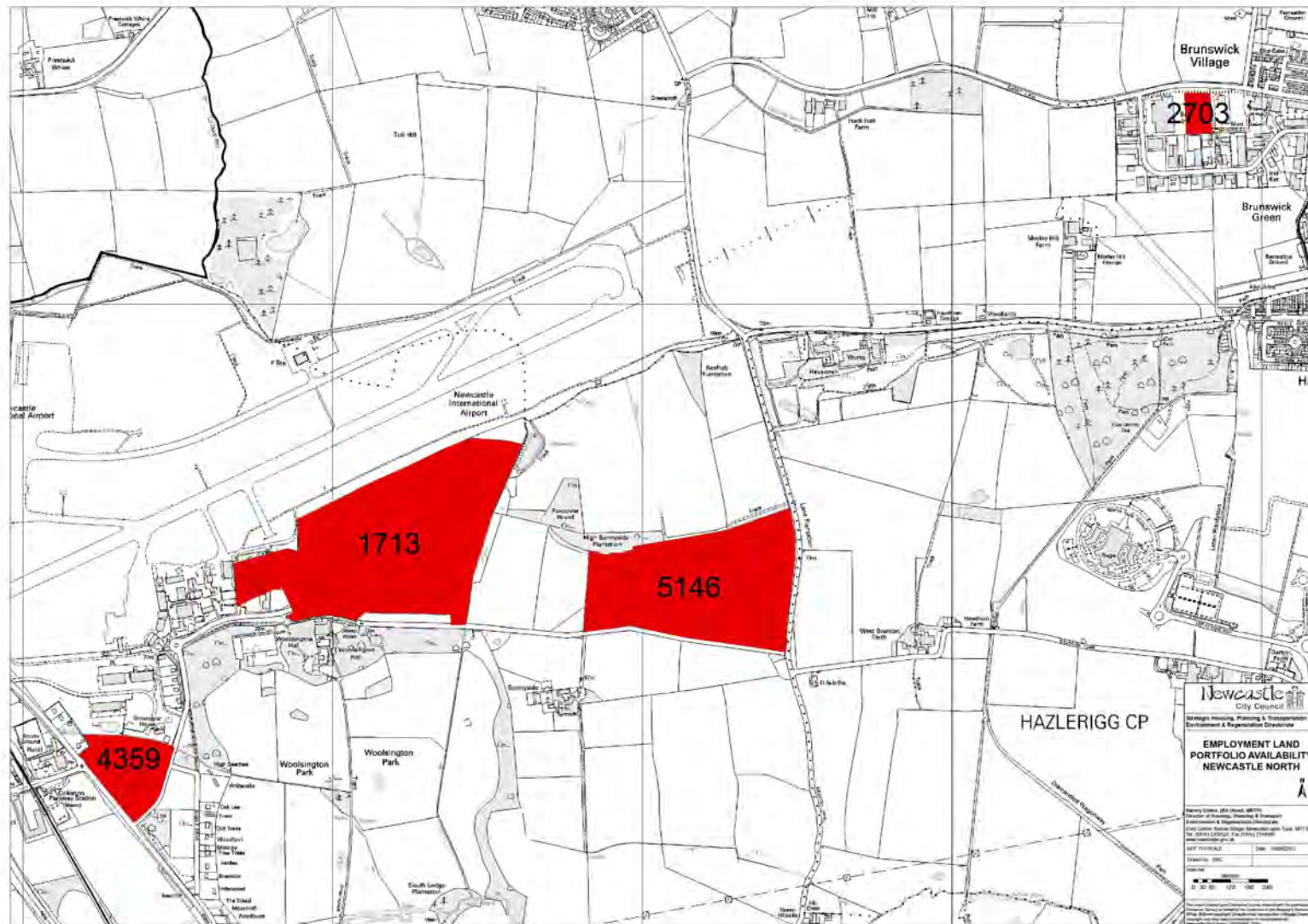
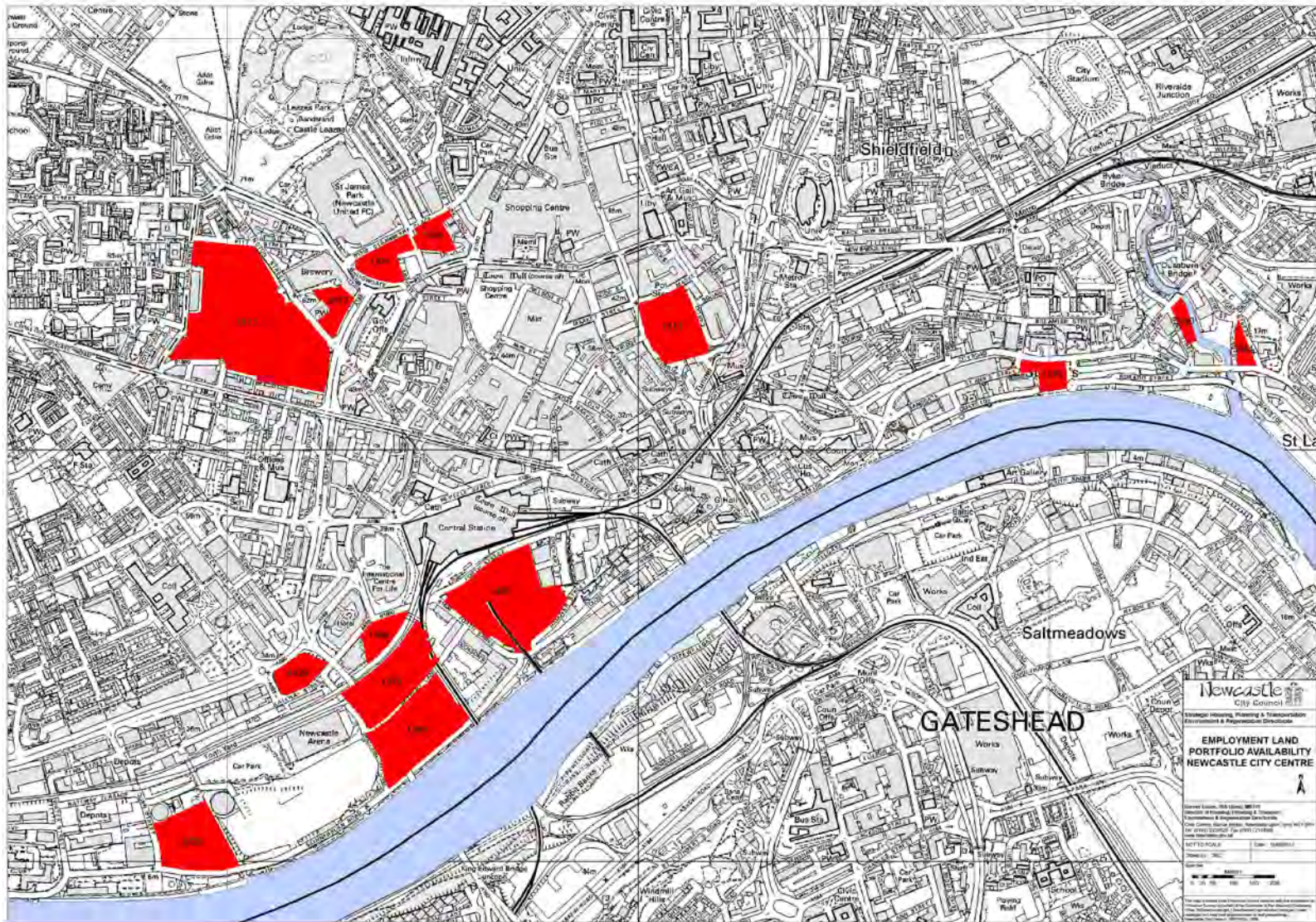


Figure 42: Location of Proposed Employment Land - City Centre



8.9 The review included site visits carried out in March and April 2012 by officers of the Council's Planning Policy team. The assessments were carried out to assess whether they were 'still fit for purpose' and could contribute to the city's strategic industrial and warehousing land needs. These were the focus of the Stage 3 review.

8.10 The locations of these sites and the site boundaries are illustrated in Appendices C, D, S and T.

- Northern Development Area (now known as Newcastle Great Park)
- Collingwood Clinic (The Tower)
- St Silas, Shields Road
- Newburn Haugh (Newburn Riverside)
- Walker Riverside Industrial Estate
- Sandhills
- Heaton Junction
- Fowberry Road, Scotswood
- Newcastle International Airport
- North Brunton
- Airport Industrial Estate
- Albion Row Industrial Estate
- Armstrong Industrial Estate
- Bells Close Industrial Estate
- Bakery, Ponteland Road
- Blucher Industrial Estate
- Brough Parkway Industrial Estate
- Brunswick Industrial Estate
- Condercum Road
- Fawdon Industrial Area
- George Street/Blandford Square
- Gosforth Industrial Estate
- Haddricks Mill Road
- Hoults Yard
- Industry Road
- Mill Lane Industrial Estate / Lynwood
- Pooley Road / Slatyford Lane
- Premier Development Centre, Whitehouse Road
- Prospect / Tynos Works
- Rainbow Workshop
- Riverside East
- Scotswood Road Industrial Estate
- Scotswood Road West
- Shieldfield Industrial Estate
- Shields Road West
- Shields Road / Fossway
- Throckley Industrial Estate
- Walker Riverside Industrial Park
- Walker Riverside (including Neptune Energy Park phase 2i)
- Warwick Street
- Westerhope Industrial Estate
- Whitehouse Road
- Whickham View
- Former Colliery Buildings Havannah
- Prestwick Industrial Estate
- Barrack Road
- Central Business Park
- Denmark Street / Heaton Road
- Kenton Bar
- Longbenton DSS
- Millers Hill, Shields Road
- Newcastle Business Park

Development Area

- New Bridge Street
- Newburn Haugh Industrial Estate
- Newburn Industrial Estate
- Newburn High Street / Walbottle Road
- Newcastle Brewery
- Noble Street Industrial Estate
- Portland Road
- Regent Centre
- South Jesmond (Portland Terrace)
- St Nicholas Hospital

8.11 Employment development is protected and encouraged on these sites. The detailed analysis of these allocations is provided in Appendices C and D. Issues reviewed include each area's locational context, accessibility, constraints, existing sectoral mix, size and type of businesses; amount of floorspace required; scope for windfall, compliance with planning policy, market attractiveness and likelihood and viability of site redevelopment. The key points of each assessment are summarised in this section, with an overall conclusion reached concerning the site's future role in the delivery of the City's future portfolio of employment land.

In addition to the above list of sites, the Council has undertaken a 'search for sites' to identify potential sites suitable for a strategic waste management facility required to support the Council's Local Plan⁴. Almost 150 sites were identified from the ELR database. Of the total list, 7 sites were identified as offering the most potential for the development of a waste management facility and therefore worthy of future consideration. These sites are:

- Sandy Lane, Brunswick Industrial Estate
- Newburn Riverside
- Siemens, South Side, Shields Road North
- Lemington Caravan Park, Riverside Way
- Walker Riverside North
- Byker Transfer Station, off Walker Road
- Benwell Transfer Station, Scotswood Road

This was a technical exercise and the findings of the appraisal (see Appendix W) were based on agreed planning criteria. They do not imply local community support or owner agreement to such a use.

Site Assessments

8.12 The following sections summarise the findings of the site assessments, discussing property market areas and the sites within them.

8.13 Full text from the ED Health Checks can be found in Appendices B, C and D.

Results of ED Review

⁴ Appendix W - Newcastle City Council: Interim Newcastle Waste Site Appraisal Assessment (2010)

- 8.14 Full results from the review of the 62 ED sites are included in Appendices C and D.
- 8.15 In summary, however, the findings of the review were:
- 23 of the 62 perform well regarding the ‘market attractiveness’ and ‘sustainability’ indicators. This was evidenced by generally:
 - high occupancy (e.g. vacancy rarely above 15% of the total number of units);
 - good physical condition of buildings (ie no significant concentrations of poor condition/derelict sites);
 - good access to the strategic road network (ie close to A-roads and the Central Motorway);
 - few occasions where adjacent residential uses were identified;
 - no significant problems noted with regard to servicing by (or internal circulation of) Heavy Goods Vehicles to ED sites;
 - good performance against a number of sustainability indicators.
- 8.16 36 of the 62 ED sites have been recommended for de-allocation. Many of these sites have been developed (or had planning permission) or are operating as non office, industrial and warehousing uses (e.g. retail, housing) so are unlikely to contribute to the City’s future office, industrial and warehousing land requirements.
- 8.17 16 of the 36 sites recommended for de-allocation had average scores against ‘market attractiveness’ and ‘sustainability’ indicators and continued protection under the development plan is deemed un-necessary, however in most cases the sites are anticipated to remain in employment use for the foreseeable future.
- 8.18 The remaining sites have either been re-allocated or are no longer available.

Analysis, interpretation and commentary on ED results

Market attractiveness of ED sites

- 8.19 Analysis of the results indicate that a third of the ED sites generally perform well against the full range of market attractiveness indicators. High occupancy levels and generally good physical condition of buildings particularly stood out from the analysis of site survey results.
- 8.20 It is acknowledged that many ED sites were identified as containing a number of buildings which were graded as being in ‘fair’ condition (ie showing extensive signs of wear and tear after 10 years plus of use). It is accepted that this would indicate a lack of market attractiveness through an unwillingness to refurbish buildings.
- 8.21 Equally, however, it could also reflect the fact that many industrial and distribution operations (e.g. waste transfer and heavy industry) place heavy physical constraints on buildings through their day to day operation. This can lead to buildings which show signs of wear and tear but which are nevertheless accepted as normal and inevitable by operators and the market. Also, unlike retail operations which seek to attract customers to their premises, it is often not seen as

a priority for many industrial and warehousing businesses to have well maintained building as they are not directly selling goods to customers on site.

- 8.22 Even with the existence of a significant number of 'fair' condition buildings, the fact that they scored well on other market attractiveness indicators (such as high occupancy, good access to the strategic road network etc.) meant that it was not enough on its own to recommend release from its development plan designation.
- 8.23 Similarly, adjacent residential land uses were identified on 23 of the 62 ED sites reviewed. At face value and taken in isolation this can reasonably be said to reduce their market attractiveness as it presents potential constraints to industrial and warehousing activities which can be noisy and involve round the clock use.
- 8.24 However, analysis of the results reveals that of the ED sites where adjacent housing was identified, the degree of constraint was often reduced by only part of the site boundary having residential neighbours. Also buffering between land uses by mature tree cover, open space, main roads, rail lines, steep site topography etc was noted. Ultimately, the fact that the high occupancy rate was generally recorded in ED sites with adjacent residential land uses indicates that the market itself does not consider them to be prohibitively restrictive.

Sustainability of ED sites

- 8.25 Analysis of the performance of ED sites against the sustainability indicators primarily results in most of the City's sites performing well. This reflects the City's accessibility by public transport, location within SOAs which are in either the most 10% or 20% deprived within England and the low jobs/workforce ratio.
- 8.26 A small number of sites had more mixed results. For example a number of ED sites were identified as containing environmental designations. This meant that continued and further office, industrial and warehousing activity on the site could compromise these important environmental assets. However, these ED sites would also be noted as performing well against other sustainability indicators. While Walker Riverside and Walker Riverside Industrial Park perform badly in terms of being within Flood Zone 3 they also score highly on social development indicators as they are in priority wards and contain Super Output Areas which rank in the 20% most socially and economically deprived SOA in England.

Conclusion and recommendations for ED sites

- 8.27 Following our individual analysis of each of the existing employment areas, we here make recommendations as to whether the site should be retained or should be considered for release from its current allocation; either as a whole or in part.
- 8.28 The overall conclusion is that in a third of cases, we consider that sites generally are 'fit for purpose' and fulfil the location for which they are intended and therefore should be retained. They provide a well functioning, strategically important and finite resource within the City, vital for meeting its current and future office, industrial and warehousing needs. Their value is particularly great given Newcastle's compact nature and significant constraints of the River Tyne and remaining Greenfield and Green Belt sites within its boundaries.

- 8.29 However, a number of sites are identified as having potential for partial or complete release. These sites have generally been re-developed, or have planning permission or other uses.
- 8.30 A further 16 sites are expected to remain in employment use but will no longer be afforded protection for employment uses. These sites with 'uncertain future' could be classified as 'Secondary Employment Area'. Many of these sites are located within priority wards, and the Council should have an open mind about potentially sacrificing some of these allocations for regeneration purposes.
- 8.31 In general, the City has enough opportunities to replace any losses of existing office, industrial and warehousing land and provide new allocations.
- 8.32 Therefore, it is recommended that 23 of the 62 ED sites reviewed should be considered as 'Primary Employment Areas' for inclusion within the Site Allocations DPD. This is so that they receive statutory development plan designation which protects them for B uses.
- 8.33 It is recommended that the Core Strategy and Urban Core Plan includes a core policy which identifies these 23 main sites for office, industrial and warehousing sites as crucial in helping to meet the City's strategic office, industrial and warehousing needs. This policy should permit change of use to non-B uses only in exceptional circumstances as they represent the strategically important stock for office, industrial and warehousing uses.

Review of non-ED office, industrial and warehousing sites

- 8.34 The focus of the ELR was to inform the Core Strategy by providing information on strategic detailed site specific employment matters and requirements. Therefore, it has focussed on quantifying the citywide future employment requirement and reviewing the City's strategically important office, industrial and warehousing areas (ie ED sites).
- 8.35 Nevertheless, in order to better understand the existing office, industrial and warehousing supply picture and inform other policy documents in the Newcastle Development Framework, it was considered useful to carry out an initial review of the City's non ED office, industrial and warehousing sites.
- 8.36 It was not practicable to survey all non UDP designated office, industrial and warehouse sites in the City. Therefore, 72 sites were identified for initial review due to their significant size. These sites included both individual buildings and groups of buildings and were distributed across the City.
- 8.37 Site visits were undertaken between August 2009 and February 2010 by officers of the Council's Planning and Housing Strategy team. The survey results found mixed levels of occupancy and physical condition of buildings.
- 8.38 Individual site survey forms along with site plan and the methodology can be found in Appendix H.

Conclusion and recommendation for non-ED sites

- 8.39 The ELR has been carried out against a backdrop of continued recession, and as such higher than average vacancy levels have been recorded for office stock. Industrial vacancy levels have been maintained at a healthy level. At the same time industrial and warehousing land is being placed under significant pressure by landowners and developers seeking to benefit from the much higher land values that arise if planning permission for housing is secured. This is evidenced by the average loss of almost 4ha per annum of industrial and warehousing land in the City over the last ten years.
- 8.40 These non – UDP designated sites can be an important economic resource for the City by helping to provide an evenly distributed portfolio of office, industrial and warehousing sites which can offer a range of local business development and employment opportunities.
- 8.41 It is accepted that many of these sites, might not be ideal for modern office, industrial and warehousing operators. For example, their location within residential areas with difficult access for Heavy Goods Vehicles servicing the site can severely affect the operational efficiency of a business.
- 8.42 On the other hand, they can provide a valuable lower cost industrial accommodation which is suitable for small, start-up or low value industrial or warehousing uses. This type of accommodation is important for the functioning of both the local and citywide economy as it helps to provide a balanced portfolio of sites which offer a wide range of business development opportunities.
- 8.43 In order to inform the detailed Site Allocations and Development Management Development Plan Document (Local Plan Part 2), this study recommends that the initial review is built on so a more detailed assessment is undertaken of the ‘market attractiveness’ and ‘sustainability’ of the City’s non ED employment sites. This will help determine their importance, both to the economy of the local area and to meeting the City’s office, industrial and warehousing needs up to 2038. It will also help assess whether they would benefit from statutory development plan designation in the Site Allocations and Development Management DPD which protects their current office, industrial and warehousing use.
- 8.44 Given the large number of these sites a minimum threshold of 0.25ha was applied.

Review of office buildings

- 8.45 Approximately 2,929 city centre office buildings were identified for review using Valuation Office Agency (VOA) Business Rate valuation data. The review of city centre stock was carried out in order to better understand the existing office supply picture. It also informed the assessment of the contribution the city centre could make to the City’s future strategic requirements for new office floorspace.
- 8.46 The City’s main stock of office buildings is in the city centre which covers an area incorporating the Quayside, Grey Street and Gallowgate.
- 8.47 Utilising their day-to-day working knowledge of the city’s office stock Storeys:ssp (as part of the Office Needs Study) appraised the market attractiveness of the

City's office buildings based on an assessment of its external physical condition and, where known, its internal condition. Each building was then given a rating from 'Excellent' to 'Poor'.

8.48 The results of the assessment were:

- 12.6% of offices were assessed as 'excellent'. These were noted mainly in the Quayside and Gallowgate area;
- 23.4% were assessed as 'good' and 44.9% as fair. These were evenly distributed across the City Centre;
- 19.2% were assessed as 'poor', including sites which were vacant and derelict, or under redevelopment.

8.49 An assessment of the office vacancy in the City was also undertaken to better understand the existing supply picture:

Focus data identifies 19% (2012) of the City's office floorspace as being vacant.

Conclusion and recommendations for office sites

8.50 The review of the office stock, suggests Newcastle has strong city centre and out-of-town markets. This was evidenced by generally good physical condition, and high occupancy, albeit it with significant differences in vacancy between locations.

8.51 In their market commentary DTZ also report that, based on current take-up, there is a potential 5.43 year supply of Grade A office space accommodation in the planning pipeline. This suggests that the Urban Core will be the focus for meeting the City's strategic requirements for new office space.

8.52 An important part of Newcastle's future economic well-being is expected to be based on strong growth in office-based employment. It is therefore important that the City Centre (as the existing and most sustainable location for office development) is properly planned and managed so that sufficient office sites are retained and made available to facilitate this growth.

8.53 A Joint NewcastleGateshead 'Office Needs Study' has been undertaken independently from the ELR. This study will inform the detailed Site Allocations DPD and help to secure that adequate sites and capacity are maintained in the City Centre. The Office Needs Study will supplement the recommendations made by the ELR for the safeguarding of valuable individual sites to meet future floorspace requirements.

9. Identifying our Portfolio to 2038

Summary

In summary, the following conclusions can be drawn:

- Newcastle City Council currently has around 101.15ha of employment land (based on the net developable area);
- Following the econometric modelling, it is apparent that the gross land requirement for the City to 2038 is equivalent to a 5 year supply of deliverable sites – 45ha at the lower end of the range and 168ha at the top end of the range;
- The site appraisals identified the potential for 14 Urban Core mixed use and office sites including Strawberry Place, Lower Steenberg's Yard, Plot 12, St James Metro, Forth Goods Yard, Safestore, South of Pottery Lane, Stephenson Quarter, South of Pottery Lane, NCC Car Park & WH Smith Depot and East Pilgrim Street.
- Should these recommendations be taken forward through the Local Plan, Newcastle would have an adequate forward supply of deliverable sites in the medium and long term with an under supply in the short term. This is considered justifiable given vacant floorspace and ongoing economic conditions.
- Furthermore, the renewal and intensification of older sites, particularly in areas of Scotswood and Walker, should be encouraged to ensure that they contribute positively to meeting some of Newcastle's employment land requirements, but taking account of the particular constraints that apply on individual sites. Where mixed-use development or potential release of an employment site to other uses is contemplated, this should have regard to the availability of alternative sites to accommodate the relocation of firms.

Introduction

- 9.1 Section 7 of this report identified a requirement for an additional gross land requirement equivalent to a 5 year supply of deliverable sites: 45ha at the lower end of the range and 168ha of employment land to 2038.
- 9.2 Our detailed site surveys in Appendices B, C and D provide a more accurate estimate of current available employment land within the City, and have allowed for an update and verification of the data in the Council's AMR (referred to in Section 6). This section first compares actual levels of available land with anticipated requirements to understand the extent to which new allocations will be required and second recommends our future portfolio of ED sites.
- 9.3 Detailed analysis of past take-up is used to inform the appropriate level of allocations for offices and industrial or warehousing. Detailed site and ED assessments have then been used to identify those sites to be retained for

employment use; those to be de-allocated; and those that should be considered as new allocations.

Current Availability

- 9.4 To understand whether existing levels of allocations are sufficient, there is a need to identify the amount of employment land that is currently available for development.
- 9.5 From the list of 104 sites totaling 725.09 ha that have been assessed, we have identified those sites, or parts of sites, that:
- a) can be currently defined as employment sites either because they have a specific allocation, are an ED allocation, or were last used for employment purposes; and
 - b) can be defined as currently available.
- 9.6 In assessing the latter we have had regard to those that are available for development either immediately, or on completion of site works /infrastructure provision.
- 9.7 Excluded are those that:
- are currently occupied;
 - are evidently expansion land for a specific company;
 - have buildings capable of re-occupation; and
 - sites which are better suited to residential.
- 9.8 Application of the above criteria will exclude some sites that could accommodate B1a office development. Sites allocated or otherwise appropriate for mixed-use development (particularly those in and around the Urban Core) have been included.
- 9.9 The sites are listed in Appendix I. In total there are 104 sites totaling 725.6 ha gross ha, of these, 35 sites are available and comprise Newcastle's employment land portfolio. The 35 sites include; 17 general employment sites and 18 sites for significant office floorspace totaling 101.15 ha net. It should be noted that the capacity of these sites to accommodate B-class uses varies and until masterplans have been produced, cannot be estimated with a high degree of accuracy. Having regard to the list of sites and range of uses that would be acceptable we have made assumptions on a site by site basis e.g. 50% / 33.3% / 25%. 69 sites totaling 570 gross ha have been discounted for employment use.
- 9.10 On the basis of the St Chads scenario, it is projected that over the period to 2038 there are net requirements for:
- an additional 22 hectares of land for office development;
 - an additional 3 hectares of land for warehousing; and
 - a reduction of 7 hectares of land for manufacturing.

- 9.11 Overall the projected land requirement will increase by 18.0 hectares. However, to ensure that losses of employment land to other uses are accommodated, a minimum of 45.0ha of available employment land at any one time is desirable, as discussed in detail in Section 7.0.
- 9.12 Factoring in the past take up rates could indicate a need for up to 168.0ha at the top end of the range.
- 9.13 We have identified there is broadly sufficient available employment land for the plan period with an under supply in the short term. However, this is considered to be an acceptable position at this time given the levels of availability and ongoing economic conditions. Unmet demand in the short term could be accommodated in North Tyneside or south of the Tyne.
- 9.14 These quantams are likely to be increased by windfall sites, which could comprise the recycling of existing employment sites that would not otherwise be picked up in the spatial planning process.
- 9.15 For many years Planning Inspectors at Public Inquiries have accepted a simplified approach to the quantitative assessment of employment land. This assumes that the gains from windfall sites and the losses to other uses will tend to cancel each other out. The accepted analysis compares current availability with past take-up.
- 9.16 In major urban areas there is a growing recognition that sites for employment development will become available through the recycling of former employment sites. Therefore planning authorities may not need to identify sites for the whole of a plan period at the start of the plan, as allocations will be topped up through recycling during the plan period.
- 9.17 Elsewhere in the UK, regional planning policy acknowledges this redevelopment process. In the West Midlands local planning authorities are encouraged to provide a five-year rolling reservoir of readily available employment land and ensure a further reservoir of land requiring preparation that can be used to replenish the supply of readily available sites. The advantage of this approach is that through annual monitoring, the supply can be adjusted in response to booms and slumps in property development activity.
- 9.18 The strength of the office market in Newcastle makes it one of the few locations in the region where rents can be high enough for this redevelopment process to occur without the need for public sector intervention. When instances of recent take-up are considered it is clear that this process is already occurring. The current recession may reduce the rate of redevelopment, but coinciding with the abolition of Empty Rates relief, it has increased the rate at which previously developed employment sites have come forward for redevelopment.

Recent Take-up

- 9.19 Analysis of past take-up of employment land within the City uses data from the Council's Annual Monitoring Reports, provided by the Council's Gazetteer Team covering the monitoring periods 2000-01 to 2009-11. Checks have been undertaken of the data against definitions of take-up which have been accepted by

Planning Inspectors at inquiries into employment land provision elsewhere in the region. These checks raised issues concerning the data's integrity due to inaccuracies in site areas, use of gross site areas when only a small part has been developed, inclusion of types of development that do not reduce the amount of available employment land (such as extensions and other building works by occupiers on their own land). The impact of the errors is potentially a substantial overstating of take-up and a consequent underestimate of the implied supply. Consequently, a detailed review of the take up data has been undertaken by DTZ on behalf of the Council to address these concerns and arrive at a more accurate figure of take up over the last ten years.

- 9.20 Based on the existing data, over this period (2000-2012), some 83.30ha has been developed for employment purposes, equating to an average of 6.95ha per annum. Based upon current employment land availability of 101.15 hectares net, and using take-up reduced by one third going forward (4.63ha), there is an implied supply sufficient for approximately 22 years.
- 9.21 It is important to note that Planning Inspectors have, in certain instances, regarded lower levels of provision as appropriate for typical future plan periods. Recent appeal decisions in the region demonstrate that Inspectors recognise that the North East RSS (now abolished) introduced an absolute maximum of 25 years provision to address the region's substantial oversupply of employment land. Lower levels of provision are therefore appropriate and encouraged. However, the ELR (in line with Gateshead) looks at a period of 25 years from the likely adoption date of the Core Strategy in 2013, covering employment land needs for a period of 28 years, from 2010- 2038. The implied supply of this ELR is considered to be within scope of this guidance.
- 9.22 To summarise, neither the econometric modelling, nor the quantum of land available when compared to past take-up, would justify additional provision. Given the increasing risks associated with estimating appropriate provision over a very long period, any proposals to use an extended plan period as an appropriate justification for substantially higher allocations should be treated with caution. However, the study has given appropriate consideration to whether certain sites could be de-allocated, or removed from ED protection, as well as the need to provide new sites better suited to providing a portfolio of between 45ha and 168 hectares that can support future economic growth in Newcastle.

The Portfolio of Sites

- 9.23 Economic modelling has identified the contraction of manufacturing (B2) and the growth of services (B1a) and distribution (B8). In overall terms, there is a need to ensure that there are sufficient allocations for office and warehouse development, whilst recognising that there can be a reduction in the land available for general industry. In identifying the most appropriate locations for further office and warehouse development regard has been had to the contextual findings of the ED Health Check Assessments; the qualitative appraisals of sites and the results of the Office Needs Assessment.

Offices

- 9.24 The NewcastleGateshead Office Needs Study, July 2012 considered the development of new offices in Newcastle over a 23 year period 1989-2011 to provide an estimate of the annual take-up of office sites over a period that spans office development cycles. Because of its exceptional size and unique nature, the redevelopment of the DSS complex at Longbenton which replaced existing premises on 23.17 hectares. Across 55.85 hectares were developed, equating to 2.43 hectares per annum.
- 9.25 There has been a noticeable shift in the location of office development activity. In recent years, take-up focused primarily on out-of-centre locations, notably Newburn Riverside, Regents Centre and DSS, Longbenton, however the focus has now switched back to the Urban Core. Offices continue to be a 'Town Centre' use and as such this shift is expected to continue.
- 9.26 New office development sites will need to meet requirements for space in business park locations as well as the Newcastle and Gateshead Central Business District. The amount of land required for future office development will depend on the density of development. These densities vary according to location. An analysis has been undertaken of the site densities achieved amongst a sample of office developments in Newcastle.
- 9.27 Economic modelling suggests an additional 22.0 hectares of land could be required for office development net to 2038, although gross requirements are likely to be higher and circa.10ha of this will be 'safeguarded' for a 'solus' site.

Industrial Land and Warehousing

- 9.28 Industrial buildings can typically accommodate manufacturing and storage uses. Similarly industrial estates often accommodate both factory and warehouse premises. There are a very few estates within the region that are regarded by the market as distribution parks, with the notable exception of Follingsby in Gateshead. In accommodating future requirements from the distribution sector Newcastle should consider the Airport and Newburn Riverside, although the future role of Newburn Riverside is discussed further in Newcastle's Emerging Employment Land Portfolio section.

Summary of Supply v Demand

- 9.29 From the assessment of the ED health checks, consideration of currently available land, and the qualitative assessment of the list of existing/committed sites, 18 allocated employment sites have been identified, totaling 84.73ha, where it is considered that they are no longer suitable for employment purposes and could be allocated for alternative uses. The sites include:
- Condercum Road (2.73ha)
 - Pooley Road / Slatyford Road (5.0ha)
 - Mill Lane South (former Rainbow Workshop) (0.5ha)
 - Kenton Bar (7.3ha)
 - St Silas, Shields Road (1.00ha)
 - Heaton Junction (5.20ha)

- Bakery, Ponteland Road (0.8ha)

9.30 Much of the 84.73ha recommended for deletion has already been redeveloped or is occupied by non B1, B2 and B8 land uses and as such these losses will not be replaced. The amount of land available for employment development figure sits comfortably between the lower and higher employment land requirements and indicates that there is enough employment land in the City. Clearly, achieving this 'target' of development will be dependent on a number of factors including adequate local labour being available, potential enabling development on mixed use sites; site constraints being unlocked to facilitate future development; and the area being able to attract more businesses in the future. It should, however, be noted that a substantial number of existing employment sites in Newcastle have remaining developable land; whilst not specifically allocated as such, they are still protected for employment use. These sites have been included in the revised 'committed employment sites'.

9.31 However, the detailed ED health checks assessment indicated that a number of the designations were no longer fit for purpose, and required modification (either extension or contraction) to ensure that the best sites in need of continued protection are afforded that right, whilst poorer existing sites, particularly those where alternative uses would be more viable and sustainable, are excluded. In addition, there are certain examples where the extension of ED boundaries would take in a new potential employment site, which would merit an allocation.

9.32 The delivery of economic development may also require qualitative improvements in the employment land portfolio. Appropriate public sector interventions could include actions such as:

- Land assembly
- Removal of physical constraints
- Infrastructure provision
- Environmental improvements

9.33 The remainder of this section reviews the site appraisal work and recommends the Employment Land Portfolio.

Newcastle's Emerging Employment Land Portfolio

9.34 Appendix I is a schedule of currently identified employment sites which will form the basis of the Local Plan Employment Land Portfolio to meet the requirements identified in Section 7.

9.35 The supply is broken down as follows:

- **Prestige site: Newcastle International Airport:** Newcastle Great Park Cell C and Cell A will be developed for housing, with land identified to the west of Newcastle Great Park (Newcastle International Airport Southside Expansion site) retained for employment uses, which could include a solus site.
- **General Employment Land: Walker Riverside/Neptune Energy Park:** Walker Riverside offshore and general industry area is a major brownfield

resource with an important cluster of sub-sea industries. Much of this area is covered by the Neptune Energy Park Local Development Order.

- **General Employment Land: Other sites:** Various remaining brownfield sites are scattered around the city within traditional industrial estates and areas.
- **Regional Brownfield Mixed Use: Discovery Quarter:** Regional Brownfield Mixed Use is the Discovery Quarter. This is a large part of the western side of the City Centre with significant sub-areas such as the Gallowgate office quarter; Science Central which is expected to focus on B1b) accommodation, and may also have B1a) offices; and the Forth Yard Study Area.
- **Urban Core Brownfield Mixed Use: Ouseburn Regeneration Area:** A significant Brownfield Mixed Use potential is identified in the Ouseburn Regeneration Area on the eastern edge of the City Centre, with particular relevance to the needs of SMEs.
- **Urban Core Brownfield Mixed Use: Other sites:** Various remaining brownfield sites are scattered around the city, notably Stephenson Quarter.
- **Airport Related Uses:** A substantial area of the original Airport Masterplan remains available.

9.36 Para. 22 of the National Planning Policy Framework (NPPF) states: “Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities”.

9.37 The supply of land available for development relative to the identified requirement is more challenging for housing than employment, this has resulted in a review of allocated employment land where housing would be achievable and where the land owners are willing to progress housing development. This review also considers options to supply alternative employment sites at suitable locations for example Newcastle Airport.

Newburn Riverside:

9.38 Newburn Riverside is on the north bank of the River Tyne. The 92ha site has undergone a major reclamation programme and has benefited from £46 million investment in reclamation and infrastructure. The park has adoptable roads serving the development sites, which also include foul and surface water drainage, water, gas and electricity. The site is allocated for employment use under saved UDP policy ED1.1.

9.39 Newburn has been identified in the Draft Plan as an ‘Area of Change’. Housing and employment surround the site. Newburn Riverside was originally conceived as a modern industrial park which would provide a major industrial economic opportunity for Newcastle and would provide a future extension to Team Valley.

Whilst there is an element of office development it was originally envisaged as an industrial site. However, Newburn Riverside has experienced a slow take-up and has a high proportion of vacancies due to current market conditions and competing sites out with the city boundary with EZ status. The site has never been a first choice for office development. Outside of Newcastle city centre, the office market within the wider Tyneside conurbation is dominated by the former Enterprise Zones at Quorum and Cobalt in North Tyneside. These parks have been able to attract the majority of the large scale office occupiers over the last 10 years due to their EZ status and significant incentive packages that have been available to new tenants. Quorum extends to around 83,610 sq m and is now fully built out with around 39,947 sq m remaining vacant. Cobalt will comprise around 232,250 sq m when fully completed, of which around 37,160 sq m is currently completed and available to let and a further 60,385 sq m remaining to build⁵. The rental packages available within these Parks and the incentive packages they offer show significant financial advantage over true city centre accommodation and other out of centre accommodation. This inability to compete has meant that previous out of town proposals, including at the Great Park and Newburn have suffered, encouraging the pursuit of alternative uses.

- 9.40 Whilst Newburn Riverside remains suitable as an employment site, it is still no longer available for employment. The site is likely to come forward for housing.
- 9.41 There is a shortage of developable land in the urban area to meet our housing needs and retain working age population. Releasing Newburn would enable a large brownfield site to be brought forward for housing and would reduce the further need to go into the greenbelt for residential development. The site is suitable for mid-market housing for which there is a need and the site has an attractive riverside frontage. It has the potential to be made accessible to public transport, local services and amenities.
- 9.42 The removal of this site from the employment portfolio would necessitate the identification of additional employment land elsewhere to meet potential demand. Any unmet demand in the short term could be accommodated in North Tyneside at Cobalt or Quorum, or south of the River at Team Valley in Gateshead. These are the dominant competitors to Newburn Riverside. Team Valley has an established critical mass with good transport links and while it has limited capacity, it is expected that there will be turnover over the plan period to meet changing needs.

Cell C and Cell A at the Great Park:

- 9.43 Newcastle Great Park is a mixed-use development, the northern part of which was originally envisaged as a premium business park, which could accommodate the larger headquarters requirements and organisations requiring an office park environment of the highest quality. The consortium that owns this land is proposing housing development across all the remaining land. At the western end, Cell A, lacks immediate infrastructure, Cell B was developed as headquarters for Sage and at the eastern end of the site Cell C, where some office development has been built, has roads and infrastructure.

⁵ DTZ: Property Market Assessment, 11 April 2013

- 9.44 The majority of Cell C and Cell A form part of the area allocated for strategic employment development under saved UDP policies ED1.1 and ED1.2 of the UDP. The Office Needs Study, prepared to inform the Local Plan, concluded that the Great Park is unlikely to materialise as a commercial destination until Enterprise Zone incentives finish at Cobalt and Quorum business parks. Office development at Cell A is not viable under current market conditions, without intervention and would be unlikely to come forward until long / ultra-long term.
- 9.45 The Great Park could contribute to the increased delivery of much-needed family homes in the short to medium term. The sites are physically suitable for housing development, and lie in an area where land is typically viable for housing.
- 9.46 Cell C has not been brought forward for employment use to date in spite of benefiting from outline planning permission for more than a decade, nor is there any immediate prospect of it being brought forward for employment use. Office development at Cell A is not viable under current market conditions, without intervention and it is unlikely to come forward until long / ultra-long term. It is unlikely that both Cell A and Cell C will be required to meet quantitative and qualitative employment land requirements to 2030 and the loss of Cell C from the City's employment land portfolio should not undermine the ability of the City to demonstrate an adequate future land supply for B1 uses. What is clear from the evidence is that there is a far greater and more pressing need for additional (family) homes to support sustainable local communities. The release of Cell C and Cell A for homes (Cell C has planning consent for residential development) can make a significant contribution to meeting these needs and is a sequentially preferable alternative to releasing more land from the statutory Green Belt.
- 9.47 The demonstrable lack of deliverable housing land, particularly for family houses represents a very important material consideration in favour of the de-allocation of Great Park and Newburn Riverside.
- 9.48 As a result of losing employment land to housing at Newcastle Great Park and potentially Newburn Riverside, there is a need to identify additional employment land (most obviously at the Airport where there is potential for employment growth at a strategic location) to meet longer term employment development needs. This is in line with the NPPF which supports Airports as areas for growth.

Newcastle International Airport:

- 9.49 PPF promotes a presumption in favour of sustainable development. Local Planning Authorities should plan proactively to build a strong, responsive and competitive economy by ensuring a flexible portfolio of employment sites to support growth.
- 9.50 Newcastle and Gateshead's portfolio of economic land needs to provide a range and quantity of sites flexible enough to accommodate changing economic circumstances and respond to market demands, whilst supporting emerging sectors. Newcastle International Airport is considered to be an important employment location which should be protected and has potential for growth. The Airport, although it currently lacks connection to major infrastructure, offers proximity to the metro, the A1 western bypass, and the A696. The site has the potential to be made accessible to labour and services.

- 9.51 The dominance of Quorum and Cobalt Business Parks will continue over the short term due to the continued high levels of availability and heavy incentives, however, in time, their dominance will decrease. There is therefore an opportunity for Newcastle to benefit when the market rebalances.
- 9.52 Over the medium to long term, there will be an opportunity for other out of town office locations to come forward and prove successful, particularly sites close to the commercial core of Newcastle city centre. The land at the south side of Newcastle International Airport would be an obvious longer term prospect.
- 9.53 NPPF recognises the importance of identifying strategic sites for local inward investment or to meet anticipated needs over the plan period. Also, where possible, identify and plan for new or emerging sectors likely to locate in their area.
- 9.54 The current range of uses at the Airport is largely restricted to distribution/Airport related uses/freight/limited range of B1. The relevant planning history for the Airport is as follows:

Site	Application Reference	Description	Status
4359 South of Freight Village (Southside B)	2007/0949/01/DET	Airport Business Park comprising 16250 sq m of office space and 232sq m of retail floorspace. There is a condition requiring that the office space is 'ancillary and is directly related to the operation or function of the Airport'	Consent renewed late 2013.
4358 & 1713 Southside A	1998/1707/01/OUT	Development of airport related uses including engineering, maintenance freight and general airport support facilities with associated new access road from Middle Drive to Callerton junction.	Implemented in part. Consent expired on October 2009.

- 9.55 Newcastle International Airport is considered to be an important employment location for general employment uses. The additional land identified at the Airport, approximately 14.4 hectares (net), would also be suitable as a single user site. Having such a site would allow Newcastle to respond to office needs for those businesses that do not require an urban core location.
- 9.56 The Airport, like the Great Park, is capable of providing large floor plates. The Airport has the potential to offer a high quality landscaped environment with access to the strategic road network and wide labour pool catchment. The transport nodes at the Airport provide significant economic opportunities. Opportunities do remain for industrial development in the area, such as freight, the servicing of aircraft and associated vehicles, supplemented by light manufacturing and storage uses, or

those uses focused on new businesses and small and medium sized enterprises.

Conclusion

- 9.57 The allocation of an employment site at the Airport will ensure a balanced portfolio of town centre and out of town office sites. This site will also help to maintain an adequate future supply and range of employment land.
- 9.58 The Airport, due to noise restrictions, is not a suitable location to meet the overriding requirements for housing, whereas the Great Park and Newburn Riverside employment sites are. Therefore a sensible approach is to identify land at the Airport which could support a critical mass of employment land which will allow Newcastle to have a suitable choice of sites to meet a range of business/office segment needs and provide flexibility to respond to changing economic conditions over the plan period. The Airport is in a good strategic location for employment growth and the development of further commercial accommodation in this location will help support the growth of Newcastle Airport, one of the region's key economic drivers.
- 9.59 The Matrix below examines the suitability of each of these sites for employment and housing over the plan period.

Criteria	Sites					
	Newcastle Airport		Newburn Riverside		Great Park	
	Housing	Employment	Housing	Employment	Housing	Employment
Suitability	X	√	√	√	√	√
Availability	X	√	√	X	√	X
Viability	X	√	√	X	√	X
Deliverability	X	√	√	X	√	X

- 9.60 To conclude, the designation of a strategic employment site at the Airport is not only to meet a quantitative need but also a qualitative need. The future success of the Airport is crucial to the economy of the region; and the emerging plan, in accordance with the NPPF, should take account of the Airport's growth aspirations which could create opportunities for new or emerging employment sectors.

Viability

- 9.61 There have been significant changes to the economic development landscape and the availability and mechanisms of public sector funding in recent years, which have reduced institutional capacity to co-ordinate and align funds around wider economic priorities. Despite impressive growth before the downturn, the North East as a whole is currently suffering considerable effects of the recession which must be addressed.
- 9.62 The creation of the North East LEP has brought a greater focus to economic

development and there have been significant projects funded by both Regional Growth Fund and Growing Places Fund, as well as through the Newcastle City Deal. However with new funding opportunities and policies on the horizon, including the Single Local Growth Fund and the EU Structural and Investment Funds 2014-2020, there is an added impetus to ensure the North East is maximising the use of these new funds alongside existing local resources, together with our understanding of the strengths and challenges of our economy.

- 9.63 Viability analysis undertaken at a high level concludes that while employment development at the Airport is challenging at the current time, over the medium to long term such a proposal would be viable as market conditions improve. Subject to market conditions, there could be the potential for a developer to make a contribution towards off-site works (to deliver the Airport employment sites it is expected that road and access improvements may be required) however additional funding sources will be required (see Appendix W for further information). These sites are a long-term project and are likely to be delivered when economic conditions improve. The sites will be implemented by the Airport with a development partner.
- 9.64 This emerging portfolio covers a very wide spectrum of business needs. It also has major implications for Newcastle's regeneration and spatial development, and its role within the Region and Local Enterprise Partnership area. It also has the potential to be the major focus for office development which is considered below.

Physical constraints

- 9.65 A constraint for some parts of the portfolio adjoining the watercourses of the Tyne and Ouseburn is that they are identified as lying within a flood zone as shown on the Environment Agency Mapping and identified in the Strategic Flood Risk Assessment Level 2 (May 2011). The areas affected are at Newburn Riverside, Walker Riverside, Newcastle Airport and the Ouseburn Regeneration Area.
- 9.66 A Flood Risk Assessment (FRA) may be required, in accordance with the National Planning Policy Framework, for planning applications in certain areas. For the development to be allocated or permitted it will need to pass the following elements of the Exceptions Test:
- a. It must be demonstrated that the development provides wider sustainability benefits to the community that outweigh flood risk; and
 - b. A site specific flood risk assessment must demonstrate that the development will be safe for its lifetime, without increasing flood risk elsewhere, and where possible, will reduce risk overall.
- 9.67 Flood risk falls into the following categories for land use purposes:
- Flood zone 1: All land uses are acceptable, and developers are not normally required to provide a Flood Risk Assessment, except for developments above 1ha or 0.5ha in identified critical drainage areas.

Flood zone 2: Development in this zone will need to demonstrate that flood risk can be effectively and safely managed. A Flood Risk Assessment will be required addressing the Exceptions Test requirements that the development will be safe for its life time, without increasing flood risk elsewhere, and where possible, will reduce risk overall.

Flood zone 3a: The water-compatible and less vulnerable uses of land are appropriate in this zone with the more vulnerable uses subject to passing the Exceptions Test. Developers should seek to create space for flooding to occur by restoring functional floodplain and flood flow pathways and by identifying, allocating and safeguarding open space for flood storage.

Flood zone 3b: There are no sites within the functional floodplain, ie those which are only suitable for water-compatible and essential infrastructure in Newcastle.

9.68 In all cases, new development should seek opportunities to reduce the overall level of flood risk in the area through the layout and form of the development, and the appropriate application of sustainable drainage systems.

9.69 The emerging portfolio raises a number of implications and issues, which are considered in the relevant sections below.

General Employment Land

9.70 Industrial buildings can typically accommodate manufacturing and storage uses. Similarly industrial estates often accommodate both factory and warehouse premises. This corresponds to the traditional development plan general industrial allocation for Use Classes B1, B2, and B8.

9.71 The potential General Employment Land draft portfolio is as follows:

Walker Riverside

9.72 Three major sites dominate this area: A&P yard, Shepherd Offshore and land adjoining Wellstream. Within this area 12.95 (ha) net remains available to be developed. The River Tyne North Bank Regeneration Strategy by North Tyneside and Newcastle Councils, covers a study area from Walker to the Bull Ring at North Shields, North Tyneside. The Strategy proposes expanding on Walker Riverside's pre-eminence as a location for marine industries.

9.73 The offshore marine sector on the Tyne is recognised as one of the area's key economic assets and a key growth sector for the North Eastern LEP area in terms of both economic and job growth, and accelerating moves towards a low carbon economy. The offshore marine supply chain is currently in the process of diversifying into the offshore wind sector, providing the marine engineering skills and technical capabilities needed to support the growth of offshore wind.

- 9.74 The City Council is committed to creating the conditions for economic growth and to the development of the Neptune Energy Park EZ areas, building on a commitment of over 25 years in which the Council has worked in partnership with the private sector to stimulate growth in the marine and offshore sector on the North Bank of the Tyne. The continued development of the Neptune Energy Park Enterprise Zone areas will build on the area's existing strengths in marine offshore engineering and the site is ideally positioned to offer direct supply lines to offshore oil and gas fields and UK wind farms in the North Sea.
- 9.75 In August 2011, the Government announced the creation of a new Low Carbon Enterprise Zone (EZ) within the North East of England which will operate until 2020. A significant element of the Enterprise Zone consists of areas of the north bank of the River Tyne, including Neptune Energy Park. Companies locating within the Enterprise Zone will benefit from reduced business rates and other financial incentives. The Zone will also be the subject of a more simplified planning process. This will be provided through the creation of a Local Development Order (LDO) which sets out an agreed basis for what sort of development will be permitted in the future.
- 9.76 The LDO provides certainty for business considering moving into the Enterprise Zone by allowing marine offshore related industries and renewable energy low carbon manufacturing industries uses on the site and a range of other buildings, extensions to buildings and external plant and equipment including microgeneration equipment within the Enterprise Zone. New free standing buildings which are not within the curtilage of an existing building would still require planning permission.
- 9.77 Various size parameters and conditions are included within the LDO, in order to protect adjacent from noise and disturbance from any developments and ensure the development is in character with the surrounding area. A copy of the LDO is attached as Appendix Q.
- 9.78 The Neptune Yard site is 26% within the Environment Agency Flood Zone 3, and the A&P yard 44%. The affected areas, which are principally the former slipways and dry docks, will require a flood risk assessment. The Council is recommended to consider removing these areas from the allocation, or specifying water compatible uses. Potential development which replaces the slipways with built up river walls could be a factor in addressing this matter.

Other sites

- 9.79 A number of sites remain within established industrial areas, and are available for suitable development. Further information can be found at Appendix H and I.

Offices

- 9.80 Offices are now by far the primary form of business accommodation required in Newcastle, for reasons which are identified in strategy and research documents referred to above, and demonstrated through monitoring. They lie at the heart of the city's regional and sub-regional role. The city has a very large office development potential within the Urban Core, as well as Newcastle International Airport.

- 9.81 Office uses are defined in the Use Classes Order 1987, each with its own set of requirements. The two principal office market sectors which are relevant to the ELR are:
- the general B1 a) office market comprises, eg, corporate, professional, legal, finance and business organisations which require larger floor plates, for prestige, main office, and “back office” purposes such as call centres. Development may be speculatively built for leasing or sale on the open market, or purpose built for particular public or private sector occupiers. The City Centre is the principal location, highly accessible to employees through public transport, or through City Centre housing; and
 - Class B1 b) knowledge transfer and research organisations with strong links to the Universities and College will be a crucial part of Newcastle’s growth, through, for example, International Centre for Life, and the emerging Science City project. Identified locations include Science Central at the former Tyne Brewery, and Newcastle General Hospital.
- 9.82 As well as the requirements of major corporate or institutional users, economic strategies require the provision of smaller suites of premises for small and medium enterprises (SMEs), ie business start-ups, managed workspace, move-on accommodation etc. These premises may combine characteristics of both B1 a), B1 b), and possibly even B1 c) light industry, where low key making, assembling or other processes may be carried out without detriment to neighbours through noise, fumes etc. This type of accommodation is particularly important to Newcastle’s growing creative industries cluster in the Ouseburn Regeneration Area, as it lends itself to conversions or new build in brownfield infill locations and smaller sites, and a lively mix of uses and activities. SME accommodation is considered in further detail below.

The Commercial Office Market, Use Class B1 a)

- 9.83 Traditionally, most commercial office space is speculatively built for the open market, though recently only with the benefit of pre-lets, due to high demand in relation to supply. Custom built space forms a relatively select part of the city’s portfolio, eg Northern Rock (now Virgin Money) at the Regent Centre, Gosforth, and HM Customs and Revenue PFI redevelopment project, Longbenton.
- 9.84 To a considerable extent over the last decade, developers have been enabling existing Newcastle occupiers to expand and upgrade, and replacing substantial losses of large obsolete office floor plates demolished or converted to other uses, eg Westgate House, Newgate House and Swan House. There is a longer term challenge to build on this momentum: Newcastle is still falling behind comparable cities in increasing the amount of prime quality new office floorspace essential for growth as a major business centre.
- 9.85 It is intended that the NewcastleGateshead Accelerated Development Zone will speed up development in major sites across the urban centre of Newcastle and Gateshead, creating over 13,000 permanent jobs, leveraging £800 million private sector investment in return for £92 million in public sector investment, and bringing a range of wider economic and social benefits to the North East region. The ADZ

will unlock key sites which are crucial to the City's employment land supply, notably Science Central, East Pilgrim Street and Stephenson Quarter.

Research and Development, high tech, etc offices, Use Class B1 b)

- 9.86 Science City is the headline name for a proposed major grouping of university based projects. The major locations Science City development will be at Newcastle and Northumbria University campuses; at the former Tyne Brewery of and International Centre for Life within the Discovery Quarter; and at Newcastle General Hospital for Ageing and Health Research. Newcastle Great Park has established its position with the Sage Software headquarter building.

Major Office Locations

■ The Discovery Quarter

- 9.87 The Quarter can be broadly grouped into several sub-areas:
- Gallowgate office quarter, including the northern end of St James Boulevard;
 - Tyne Brewery / Science Central;
 - the southern and middle parts of St James Boulevard;
 - south of Central Station (Stephenson Quarter);
 - Forth Yard Study Area: a longer term development area currently being evaluated, including Network rail operational land, the west side of Forth Banks, Pottery Lane and the Calders site.
- 9.88 A significant part of the area will be developed for academic spin-off research B1 b) development under Science City.
- 9.89 Science Central falls within the ADZ. The 12.1ha site is at the heart of the city, and is set to become a new urban quarter for the city. It will offer opportunities for businesses to co-locate with Newcastle University, building on the strengths of world-class research strengths and generating new economic opportunities in the areas of science and innovation.
- 9.90 Discovery Quarter B1 a) office space potential (as indicated in Appendix H and I) can only be broadly estimated over the plan period. Figures are based on developers' indicative or proposed schemes, together with estimates where this is considered feasible, based on the floorspace calculator and the following criteria:
- mixed use schemes with offices as the major element, alongside other uses such as apartments, hotels, student housing;
 - buildings of 5 storeys maximum, reflecting the general grain of the city, and envelopes of recent office developments, eg, City Gate, St James Gate, Trinity Gardens; and

- allowance on larger sites for outdoor space for landscaping, public realm, civic spaces, etc.

■ Central

- 9.91 The most significant site coming forward in the Central area is East Pilgrim Street. East Pilgrim Street falls within the ADZ and is a large and strategically important regeneration opportunity area at the heart of Newcastle City Centre, comprising some 17ha of land adjoining the retail core. Approximately 3ha are anticipated to come forward for Grade A office space.

■ Quayside

- 9.92 Stephenson Quarter is also part of the ADZ and is a comprehensive mixed-use redevelopment including hotels, offices and residential accommodation, cultural buildings and cafes, restaurants and bars. Planning permission was granted in 2009 followed by a subsequent amendment in 2011. The scheme represents one of the largest proposed physical redevelopment projects in the City Centre with a development programme likely to commence in late 2013. 40,000 sq m of office / business accommodation is proposed as part of the development.
- 9.93 Plot 12 Quayside also provides the opportunity for delivery in the medium term. Plot 12 Quayside, or 'Imperial Quay' as it is to be known, has the potential to accommodate approximately 8,700 sq m of office space.

■ Ouseburn

- 9.94 1PLAN, Phase 1: Ouseburn and East Quayside Development Framework sets down how key sites including the Lower Steenberg's Yard, will be brought forward as part of a phased development programme.
- 9.95 The vehicle for progressing the above character areas is the Urban Core Plan, and as such over the plan period these figures are subject to change.

Newcastle Great Park (NGP)

- 9.96 NGP incorporates a business park, which was proposed in Newcastle's UDP (as the Northern Development Area) as a significant business location for high technology activities, with close links to the City Centre, Newcastle Airport, and the regional transport system. Sage Software occupies most of Cell B. However, as discussed earlier in this report, the remaining cells will be brought forward for housing.

General Conclusions on offices

- 9.97 It is clear that there is significant capacity in the City for office development in a variety of forms, primarily within the Urban Core. B1 a) office capacity has been estimated at Appendices H and I.
- 9.98 It is anticipated that the NewcastleGateshead ADZ will unlock growth across the Urban Core, returning the area to its pre-recession economic trajectory, which had seen more rapid employment growth in Newcastle than any other core cities.

The ADZ is aligned with our economic strategy, which concludes that to reach our full economic potential we must grow the knowledge economy, develop and retain a skilled workforce, promote regeneration that is sustainable and stimulate growth in the urban core where we are most competitive. The ADZ covers three sites in Newcastle which offer significant growth potential over the next 25 years, where we can accelerate growth in the short and medium term:

- Science Central, offering opportunities for businesses to co-locate with Newcastle University;
- Stephenson Quarter and Central Station area, primed to become a major new office district in the next decade; and
- East Pilgrim Street, an under utilised area adjacent to the city centre's main business and retail district, set to become a substantial mixed-use development.

9.99 These sites currently face a number of obstacles which inhibit development: viability gaps, constraints in public and private sector finance and the requirement for significant up-front enabling infrastructure investment – including site preparation, demolitions, energy and utilities infrastructure, and highways improvements.

Small and Medium Enterprises (SMEs)

9.100 Research and studies, as outlined in Chapter 2, seek to stimulate the growth of small business, and emphasise the need for incubator and move on accommodation, in a variety of forms of tenure, and in a variety of locations. The range of accommodation required can be provided within the development land portfolio, and also within established employment areas. Newburn and Walker Riverside provide for general business use, and specialist needs such as offshore industries.

9.101 The City Centre and the Ouseburn Regeneration Area are now established locations for research and development, bioscience, media, and digital businesses. Established industrial estates like Brunswick and Throckley are popular for new-build and conversion. The Scotswood Road corridor, from the City Centre to Lemington, includes substantial established and newer employment areas such as Benwell Business Park.

9.102 The areas which can be identified as particularly suited to SME accommodation are:

- established industrial estates and other employment areas;
- Newburn and Walker Riversides, and Scotswood Road Innovation Parkway corridor for general and specialist industrial and other accommodation;
- Discovery Quarter for Science City related enterprises; and

- Ouseburn Regeneration Area for digital, media and creative enterprises.

Ouseburn Regeneration Area

- 9.103 The Lower Ouseburn valley contained a major concentration of heavy industries in the 19th century, but after their disappearance it declined in importance, and is not subject to any current overall statutory designation. More recently, it has begun to re-emerge as a new focus for a wide range of small businesses and housing. The Ouseburn Regeneration Area is now the most significant and substantial new employment area since adoption of the Unitary Development Plan in 1998. It extends along the river Tyne frontage from the west bank of the Ouseburn to St Peter's Basin and the landmark of Spillers Mill. It extends inland as far north as Shieldfield. The area includes historic industrial allocations at Albion Row; Shieldfield Industrial Estate and Hoult's Yard which is now an important small business centre and Riverside East which contains a wide range of business accommodation.
- 9.104 The non-statutory Regeneration Strategy for Lower Ouseburn is a guide for local businesses, land owners and developers, providing the framework for detailed site development briefs. The area contains the Lower Ouseburn Conservation Area, and a Character Statement (2000) and a Conservation Management Plan (2004) have been formally adopted, together with the Urban Design Framework, a SPG identifying land use planning and transportation opportunities as well as identifying constraints to the site. The guidance highlights the relevant policy considerations, statutory requirements and introduces design principles which must be addressed in the submission of a planning application for any proposed development within the Lower Ouseburn Valley.
- 9.105 The vision for the area is for a mixed urban village centred on the historic conservation area core. Housing, cultural, performance and media uses are a major aspect of the area's character.
- 9.106 One of the aims of the ADZ is to set up a central Newcastle Skills Hub, both physical and virtual, to integrate disadvantaged groups into the labour market, upgrade the skills of the low-qualified in employment and promote the development of skills which will meet the needs of the future economy. It will also promote apprenticeships, acting as a central point for applicants and helping to reduce costs to SMEs of taking on apprentices.
- 9.107 We also intend to work with local apprenticeship providers and firms to reduce the cost and risk of taking on an apprentice for SMEs, increasing apprenticeships by 15%, or 500. Government funding, through the City Skills Fund, will be used support these activities.
- 9.108 Appendices H and I identify actual and potential development sites within the Strategy boundary. These sites will have urban design and transportation implications that will be considered in the Development and Allocations DPD. Information pertaining to potential employment floorspace and figures are shown in Appendices H and I.

Waste and other “Bad Neighbour” uses

Waste management facilities and other bad neighbour uses can include a wide variety of waste related operations such as household waste reception centres, sorting facilities, materials recovery, scrap yards and end of life vehicle sites.

Government guidance required that waste planning authorities identify sites and areas suitable for new and enhanced waste management facilities for the needs of their area. To this end, the Council prepared an Interim Waste Site Appraisal Assessment which seeks to identify potential sites to host waste management facilities, through technical evaluation, based on planning criteria.

A proposal to develop a waste management facility on any of the identified sites would require more detailed evaluation, based on the facility being proposed, including an assessment of the environmental impacts and community consultation.

The existing strategic waste management sites at Benwell and Byker are within the shortlist of potential sites and both will be safeguarded within the Local Plan period.

10. Site Deliverability

The supply of employment land for development is highly dependent upon availability; private landowners simply may not wish to release land for development. This could be because their handling of the land is restricted by title issues or trusts, or because they have alternative aspirations for the site, often for higher value uses such as residential. A robust evidence base underpinning the Local Plan is therefore important in providing the conditions necessary to support, protect and bring forward valued employment sites for development.

Notwithstanding ownership and planning policy constraints, the financial viability of a site plays a crucial role in determining whether it comes forward for development. Redevelopment costs (particularly site remediation), anticipated demand and rental levels are all fundamental components of a scheme's viability and if these are considered to be unfavourable at a particular site then landowners are unlikely to put the land forward.

In such instances, public sector intervention may be required in the form of subsidy, grant or gap funding to make a site stack-up financially. Alternatively, a site could be brought forward as a mixed-use scheme to enable higher value uses to cross-subsidise the provision of new employment land / premises. Maintaining a flexible approach to requiring s.106 contributions could also reduce the overall financial burden on developers. Public sector investment should focus upon facilitating parcels of ready-made, serviced, development land.

It should also be noted that the greater the policy specificity and certainty, the easier it is for the market to make informed investment decisions. A clear implementation strategy setting out the phasing of development and the actions needed to deliver the requisite infrastructure can help in this regard. This is particularly important for the delivery of transport infrastructure improvements/mitigation.

An attempt has been made to provide an indicative delivery strategy for the portfolio of sites identified above. To ensure that the City is able to maintain a variety and choice of sites throughout the plan period we have considered the development constraints of each site within the portfolio and categorised them as follows. Some correlation can be expected between the complexity and costs of redevelopment and the time it takes to deliver a site. The categories below are broadly ordered according to ease of delivery.

- Immediately Available: Cleared sites with an established access that would incur little or no abnormal costs of site preparation or servicing.
- Minor Constraints: Cleared sites that from our knowledge of them would require modest costs of site servicing or remediation.
- Major Constraints: Cleared sites requiring substantial costs of site servicing or remediation prior to redevelopment including mitigation of flood risk and/or trunk road congestion

- Occupied Premises: Sites where occupied premises would need to be vacated before redevelopment could take place – here abnormal costs may include compensation as well as demolition and remediation (hence potentially a major constraint to development).
- Occupied premises requiring site assembly: Sites where premises are occupied by more than one business adding to the complexity of site assembly, prior to redevelopment (hence potentially a major constraint to development).
- It is considered that there is sufficient office and general employment land available to 2030. It is recognised that the 21.69 ha falls short of the 45ha target in the short term, the Council considers that due to vacant stock and the ongoing economic downturn that this approach is justifiable. The indicative delivery strategy is based on an academic exercise that takes into account property market cycles, as notably the market plays an important role in determining when sites are brought forward. The Council will monitor the availability of employment sites on an annual basis with a view to maintaining a five year supply of immediately developable sites.
- The delivery of economic development is ultimately not determined by the level of constraints on individual sites, but by market conditions, developer confidence, availability of finance and regeneration imperatives.

Introduction

- 10.1 The National Planning Policy Framework stresses the need to ensure that the sites and scale of development identified in a Local Plan should not be subject to such a scale of obligations, standards and policy burdens that cumulatively this threatens the plan’s ability to be developed viably. The viability work undertaken as part of the ELR is appended as Appendix P.

National Planning Policy Framework, para 173 states:

“Pursuing sustainable development requires careful attention to viability and costs in plan-making and decision-taking. Plans should be deliverable. Therefore, the sites and the scale of development identified in the plan should not be subject to such a scale of obligations and policy burdens that their ability to be developed viably is threatened. To ensure viability, the costs of any requirements likely to be applied to development, such as requirements for affordable housing, standards, infrastructure contributions or other requirements should, when taking account of the normal cost of development and mitigation, provide competitive returns to a willing land owner and willing developer to enable the development to be deliverable.”

- 10.2 Financial viability for planning purposes is defined by RICS Professional Guidance, Financial viability in planning, 1st edition, guidance note as:

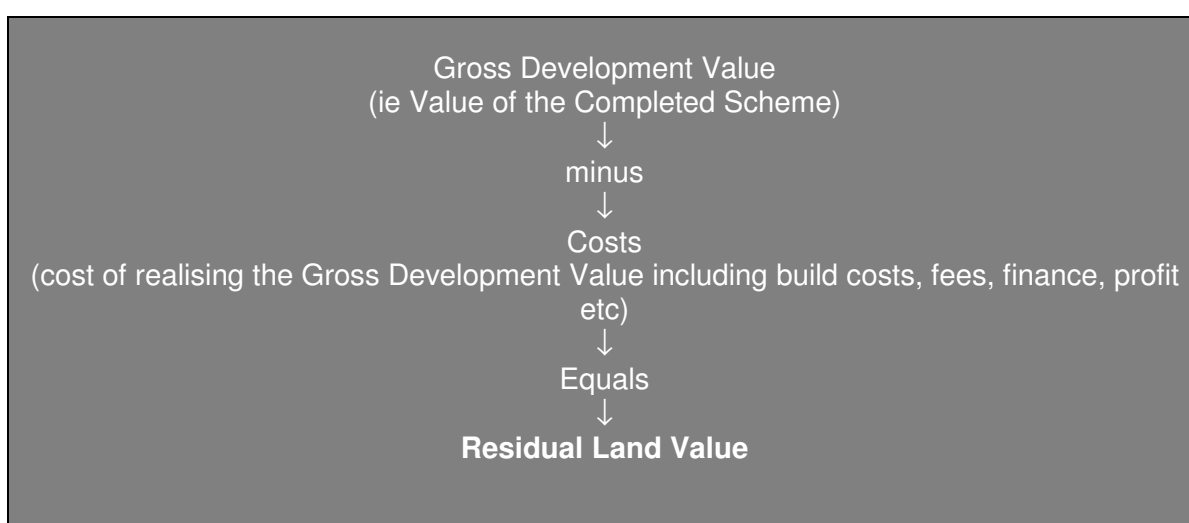
“An objective financial viability test of the ability of a development project to meet its costs including the cost of planning obligations, while ensuring an appropriate Site Value for the landowner and a market risk adjusted return to the to the developer in delivering that project”.

Methodology of Assessment

Residual Valuation

- 10.3 This section outlines the methodology used to assess the viability of the City's employment land portfolio. We have run development appraisals using the well recognised principles of residual valuation on all of those sites which are believed to be suitable, available and deliverable for employment development.
- 10.4 Residual valuation as the name suggests provides a 'residual' value from the gross development value of a scheme after all other costs are taken into account. Figure 43 below shows the principles behind residual valuation.

Figure 43: Simplified Residual Land Valuation Principles



- 10.5 Having allowed for the costs of development, finance and profit, the resulting figure shows what is potentially left over to pay for land.
- 10.6 In order to guide on a range of likely viability outcomes the assessment process also requires a 'benchmark' against which to compare the resulting residual value - such as an indication of existing or alternative land use values ('EUVs' or 'AUVs') relevant to Newcastle and Gateshead and any potential uplift required to encourage a site to be released for development (which might be termed a premium, excess, incentive or similar).
- 10.7 A suitable land value to encourage the release of a site for development is a site specific and highly subjective matter and relates to the specific requirements or hopes of the landowner. Therefore Benchmark Land Values using sources such as the Valuation Office Agency (VOA) reporting and any available sales evidence have been used for this purpose in making our assessment.

Site Typologies

- 10.8 Development appraisals have been carried out on a variety of commercial schemes.

10.9 Site coverage is based on this Employment Land Review, using HCA guidance and empirical evidence. Typical development densities are outlined in figure 44, below.

Figure 44: Commercial Development Plot Coverage

Use Class	Example Scheme Type	GIA (sq m)	Site Coverage	Site Size (HA)
B1(a) – Offices*	Office – Town Centre	4000	400%	0.10
	Office Neighbourhoods	2000	40%	0.50
B1 – Light Industrial, B2, B8 Industrial	Industrial Warehouse	3000	40%	0.75

* Non-City Centre GIA of rooms inc. circulation = 25 sq m. City Centre GIA of rooms inc. circulation = 45 sq m.

Gross Development Value (Scheme Value) - Commercial

10.10 The value generated by a commercial scheme varies enormously by type of development and location. In order to test the viability of commercial schemes some assumptions have had to be made with regard to rental values and yields of each commercial scheme tested. Data on yields and rental values has come from a range of sources including the VOA, Focus/Co-star and those gathered by Newcastle and Gateshead and by retained consultants.

10.11 Figure 46 below shows the range of yields and rental values assumed for each scheme type in order to capitalise the annual rental value and provide a Gross Development Value for each scheme dependent on the combination of yield and rental value. The rental values were tested at 4 levels – Low, Medium, High and City Centre - representative of low, mid, high and City Centre rental values assessed as relevant for each commercial scheme type.

Yields. We have adopted commercial yields shown in Figure 45.

Incentives. We have adopted the rent free periods set out in Figure 46.

Figure 45: Rental Values for Commercial Schemes

Scheme Type	Rental Value Level £/m2			
	Low	Med.	High	City Centre
CITY				
B1(a) Offices	86.00	108.00	161.00	215.00
Yield	8.0%	8.0%	8.0%	6.5%
B2 Industrial	45.00	50.00	60.00	-
Yield	10.00%	9.00%	7.50%	n/a

Figure 46: Base Yields

Scheme Type	Adopted Rent Free Period
Offices	15 months
Industrial	10 months

It is important to note here the impact on the gross development value (and thus the viability of a scheme) that small variations in yield or rental value can have.

- 10.12 This viability work has been carried out at a time at the end of a significant downturn in the property market and also as the effects of the Government's Comprehensive Spending Review are continuing to filter into the economy. At the time of writing there is no significant speculative commercial development happening as funding for such schemes has been scaled back. Development at the moment, with few exceptions, will only happen with the benefit of pre-lets but of course the recessionary period and the impact of public sector cuts has cut down on occupier demand. The property markets (residential and non-residential) peaked early in 2008 and since then there has been considerable change with the levels of transaction and prices falling.
- 10.13 Notably, commercial development appraisals and specifically the gross development values are extremely sensitive to small shifts in yields.

Development Costs – General

- 10.14 Development costs vary significantly from one site to another. In a strategic study such as this, the assumptions have to be fixed to enable the comparison of results and outcomes relating to the strategic view of viability rather than site specific cases. Each development cost assumption is based on data sourced from information such as the RICS Building Cost Information Service (BCIS), development consultation, professional experience or other research. For this overview we have made an allowance for abnormal costs across the tested sites. This allowance has been set at 5% on costs, but site specific abnormalities cannot be accounted for in a study of this nature.

Development Costs – Build Costs

- 10.15 The build costs shown below are taken from the BCIS and the median figure, based to Q3 2011 (ie latest available pre-forecast data at the time of the research) and a Newcastle and Gateshead location index (0.94) is used. Costs shown are for each development type (residential and commercial):

Figure 48: Build Cost Data (BCIS Median, Q4 2011, Location Index 0.93 – other than as stated)

Use Class	Property Type	BCIS Build Cost (£/sq m)*	Gross to Net %
B1(a)	Office Building – Urban Core. 3.5 storey air conditioned	£1,152	80%
	Office Building – Neighbourhoods. Offices generally	£1,069	85%
B1 Light Industrial, B2, B8 – Industrial	Industrial Warehouse (Purpose Built)	£433	100%

* excludes externals and contingencies (these are added to base build cost)

- 10.16 The above build costs do not include contingencies or external works.
- 10.17 An allowance of 5% of build cost has also been added to cover contingencies. This is a typical allowance in a residual appraisal.
- 10.18 Allowance for externals will always vary on a site by site basis and accordingly it is necessary to adopt a standard rate for externals (as a percentage of build costs) to be adopted for the appraisals carried out. Externals include, inter alia, service connections, landscaping, car parking and internal access roads if applicable.
- 10.19 In this respect regard has been made to publically available information from BCIS and also to advice from consultants. The amount of allowance for externals is as detailed in Figure 48.
- 10.20 For some developments external works will be significantly higher and other significantly lower and so therefore an average range has been adopted for development typologies as follows:-

Figure 48: External Allowances

Scheme Type	Externals Allowance – Percentage of Base Build Cost
Commercial	7.5% - 15%

Development Costs – Fees, Finance & Profit (Commercial)

- 10.21 Development cost allowances for commercial development are as follows:

<p>Professional and other fees:</p> <p>Total of 12% of build cost (including planning, building regs, insurances etc)</p> <p>Site Acquisition Fees:</p> <p>1.0% agent’s fees 0.75% legal fees Applicable Standard rate for SDLT</p>

Finance:

6.5% interest rate

It is assumed that the development is debt funded. This is an industry norm for residual appraisals

0.1% (of cost) arrangement fee

Marketing costs:

1% advertising fees (% of annual income)

1.5% sales fees (of sales price where applicable)

10% letting fees (% of annual income)

'Externals'

7.5% - 15% Build Costs

Developer Profit

15% on cost

'Abnormals Allowance'

5% build costs

'City Centre Abnormals Allowance'

5%

S.106

No s.106 Costs have been included

Build Period

- 10.22 The build period assumed for each development scenario has been based on BCIS data using its Construction Duration calculator (entering the specific scheme types modelled in this study) alongside professional experience. The following build periods have therefore been assumed:

Figure 49: Build Period

Scheme Type	Build Period (months)
Office Building – Centre	14
Office Building – Out of Town Business Grange	12
Industrial Warehouse	6

11. Conclusions and Recommendations

Newcastle cannot stand still. The world around it continues to change at an ever-accelerating rate, and the competition from other cities for investment continually increases. It is the places that can most successfully evolve and adapt that will be able to protect and enhance their position and the quality of life of their residents. Newcastle and Gateshead is determined to maintain economic momentum and to make Newcastle and Gateshead a working city. This will be achieved by being open for business and creating the conditions for private sector growth by investing in key economic infrastructure; growing our leading marine, offshore and low carbon sectors; finding innovative ways to meet our housing ambitions; improving connectivity into the city; and by strengthening our presence in global markets through enhanced international transport links.

Newcastle Gateshead Core Strategy and Urban Core Plan is committed to deliver economic growth for Newcastle and Gateshead and creating new jobs. The Plan's role is to objectively identify and then meet the needs of business in the area by allocating sufficient land for development, and respond positively to wider opportunities for growth.

The City requires between 45ha (5 year rolling supply of deliverable sites) and 120ha (gross) to meet employment land needs up to 2030, and between 45ha (rolling 5 year rolling supply of deliverable sites) and 168ha to 2038.

Following a detailed review of all the ED sites in the City, and the existing, committed and potential employment sites therein, it is recommended that the City's portfolio should comprise 34 employment sites, totalling 101.15ha.

Introduction

- 11.1 This section sets out the report's recommendations for positively informing the Local Plan. It makes recommendations to support the Site Allocations and Development Management DPD document evidence base (due to commence preparation in late 2013). Finally, it suggests ways in which the monitoring of the City's employment sites portfolio could be improved.

Policy

- 11.2 National planning policy requires sufficient land to be provided to cater for employment needs to encourage economic development, providing for choice, flexibility and competition. It suggests some industrial sites may be more appropriately developed for housing.
- 11.3 Regional and economic policy traditionally aimed to improve the competitive position of the regional economy, improving productivity of the region's employment position, targeting high value sectors and creating net new businesses.
- 11.4 Unitary Development Planning Policy and 1PLAN focuses on the Urban Core, with the development of many mixed-use sites driving economic development and regeneration of Newcastle's City Centre.

Economic Context

- 11.5 Newcastle has a high proportion of employment in banking, finance and insurance sectors than the regional economy.
- 11.6 Manufacturing in Newcastle has declined compared to both the North East and England, and high proportions of residents work in Sales and Customer Service.
- 11.7 Newcastle has a workplace population of 158,700 with 88,700 commuters. This significant, net in-commuting balance reflects Newcastle's influence as an employment centre over the region.
- 11.8 However, unemployment is higher than the national average and economic activity rates and self-employment rates are low.
- 11.9 Despite its industrial heritage, Newcastle has been diversifying its employment base, with strong growth in banking, finance and insurance sectors. The extent of employment growth in different sectors will be impacted by employment land review.

Supply Demand Balance

Employment Forecasts

- 11.10 Recent population forecasts suggest that the working age population (20-64yrs) in Newcastle will increase by approximately 12,600 to 2030. This is encouraging for our Working City and sustainable growth commitments.
- 11.11 Office floorspace is forecast to grow by up to 14,400 jobs or 30.4%, under the St Chads Scenario. The range between the other four scenarios is between 9,000 jobs and 15,400.
- 11.12 Under the St Chads Scenario, Industrial jobs are forecast to decline by 800 or - 6.7% to 4900 or 40.8%. Warehousing employment is forecast to grow by 2.8% an increase of 100 jobs.

Figure 50: Newcastle Forecast Employment Change 2010 – 2038

	Long Term Recovery	St Chads	Cambridge Econometrics
B1 Office	9,000	14,400	15,400
B2 Industrial	-4,900	- 800	- 800
B8 Warehouse	100	200	300
Total Change (no)	4,200	13,800	14,900
Total Change (%)	-18.4%	27.6%	32.1%

Source: DTZ Research

- 11.13 Using employment forecasts as a proxy for forecast demand gives an estimate of a requirement of between - 27.0ha and 21.0ha for offices to 2038 (depending on development densities).

The Office Market

- 11.14 Newcastle has both a strong City Centre and out-of-town markets. Rents have remained relatively robust despite the poor economic climate, and good quality stock has been occupied quickly. Rents are expected to stay around the £20.00 per sq. ft mark until 2013, as the small number of completed schemes expected between 2010 and 2012 should see demand catching up with supply before additional stock can be delivered.
- 11.15 The regeneration sites in the Urban Core, identified in the Schedule in Appendix P are the priority location for office development in policy terms. These sites will have different levels of B1 development and we have estimated potential development areas based on market knowledge, previous developments and the calculator at Appendix J.

The Office Market Balance

- 11.16 **Demand:** Employment forecasts show a demand for employment land of between 7.2ha and 14.7ha to accommodate new jobs in offices up to 2030, and between 14.0ha and 23.0ha up to 2038 (depending on development densities). These figures should be considered as a 'baseline' situation, which does not include policy aspirations for higher growth in these areas. Due to the 28 year period that the ELR covers, no margin of choice has been included as this would in effect be double counting.
- 11.17 **Supply:** The forecast demand is compared with estimates of land supply. There is an estimated 40.13ha of office land. This comprises allocations from the UDP that have not been developed, office-led/mixed use redevelopment sites and new allocations.
- 11.18 **Market Balance:** An initial net balance suggests:
- There is a slight oversupply of land which could come forward for baseline office development up to 2030 of 3.90ha.
- Long Term Recovery: 36.9ha;
 - St Chads Econometrics: 36.9ha;
 - Cambridge Econometrics: 27.9ha.
- 11.19 Mixed-use regeneration sites within the Urban Core are the most important in policy terms. Assuming all of these sites come forward for development, Newcastle has an adequate supply of office land over the plan period.

Industrial and Warehousing Market Balance

- 11.20 **Demand:** Employment forecasts show declining numbers of jobs in industrial sectors and growth in warehousing jobs up to 2038. This suggests that over time, there is likely to be a net decline in the requirement for land for industrial floorspace, estimated to be between – 7.0ha (net) and - 42.0ha (gross). However, there will still be a positive requirement for new land for development, to allow the market to function efficiently, to accommodate new companies locating to Newcastle and to allow companies to expand.
- 11.21 **Supply:** The supply of industrial and warehousing land amounts to 66.71ha, comprising primarily available UDP sites. An initial comparison of supply against demand for industrial and warehousing land suggest there is an over supply against all scenarios ranging from 24.71ha to 59.71ha. However, this masks a more complicated picture as a number of sites are constrained. In order to demonstrate flexibility of Newcastle’s employment land portfolio over the plan period, this figure is considered adequate given our forecast gross land requirement.
- 11.22 **Market Balance:** Given this supply position of many small, piecemeal sites and sites constrained by ownership, should a large inward investor want to locate in Newcastle, or should an existing employer be looking for a large site for expansion or relocation, other than Newcastle Airport it is unlikely that there would be a suitable site for them in Newcastle, particularly in the short term.

Supply Demand Balance to 2038

- 11.23 When constrained sites and piecemeal sites are excluded from the supply (from the undeveloped UDP allocations), the ‘effective supply’ is much lower. However, it would be misleading to suggest that the small, piecemeal sites should be excluded from the total supply, as they do provide for some land for companies to expand into if only small sites are required.

Possible Sites for Release from Employment Allocation

- 11.24 We have, through Employment Land Health Checks identified 15 sites which either in whole or in part, should be released and a further 16 sites which will be de-allocated but are anticipated will remain in employment use. None of these sites are included in the 101.15ha total of available sites for development. However, they would reduce the overall supply of as they would effectively be ‘windfall losses’. This is why it is extremely important that the employment position is monitored and managed.

Core Strategy Recommendations

Introduction to Core Strategy

- 11.25 Core Strategy and Urban Core Plan is being prepared with Gateshead. This document will provide the spatial vision for how Newcastle will develop to 2030. In order to deliver this vision it will also set out a spatial strategy for guiding this development.

11.26 The latest Government guidance contained within the National Planning Policy Framework advises that a ‘presumption in favour of sustainable development’ lies at the heart of the plan-making process. This means local planning authorities should positively seek opportunities to meet the development needs of their area and that Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change. This means the spatial strategy should include the local authority’s strategy for promoting the well-being of the local economy incorporating the identification of the scale of new employment land needed. The Development and Allocations Development Plan Document will then use this guidance to identify and allocate sites for employment use.

Recommendations

11.27 The ELR recommends that the Core Strategy and Urban Core Plan enables the future delivery of employment land to 2030 in Newcastle of between 82ha and 120ha.

11.28 The Plan should promote the city centre as the main focus for this development. Scope to attract office development will be considered as part of efforts to drive forward the regeneration of Newcastle.

11.29 The ELR recommends that the Core Strategy and Urban Core Plan considers the inclusion of a core policy which identifies key employment areas from the emerging employment land portfolio which will drive forward economic growth and secure sustainable investment over the plan period. . The supply of employment land will be allocated within the Development and Allocations Plan. Figure 51 sets out the current delivery strategy of available employment sites over the plan period, based on the findings of this latest review. The available employment sites will be regularly reviewed.

Figure 51: Employment land delivery over plan period

		Employment Land Supply Net Area (ha)			
Land Resource Reference Number	Area	Immediately available (0-5 year)	Minor Constraints (6-10 year)	Over 10 years	Total
	Newcastle North				
4359	South of freight village, Newcastle International Airport		2.0	2.0	4.0
1713	Southside, Newcastle International Airport		13.78	18.23	32.01

		Employment Land Supply Net Area (ha)			
Land Resource Reference Number	Area	Immediately available (0-5 year)	Minor Constraints (6-10 year)	Over 10 years	Total
5146	Airport Southside Expansion Area		7.20	7.20	14.40
2703	Sandy Lane, Brunswick Industrial Estate		1.12		1.12
	North Total	0	24.1	27.43	51.53
	Newcastle West				
4219	Whitehouse Enterprise Centre	2.00			2.00
3025	General Hospital Site		3.20		3.20
2758	Cutty Coats, Throckley Industrial Estate		1.12		1.12
2794	Shelley Road, Newburn Industrial Estate		1.01		1.01
5320	Goldcrest Way, Newburn Riverside	1.12			1.12
5321	Kingfisher Boulevard North, Newburn Riverside	2.54			2.54
	West Total	5.66	5.33	0	10.99
	Newcastle City Centre				
1412	Main Former Brewery Site	0.75	0.75	0.75	2.25
3077	Heber Street and Brewery Offices	0.13	0.13	0.13	0.39

		Employment Land Supply Net Area (ha)			
Land Resource Reference Number	Area	Immediately available (0-5 year)	Minor Constraints (6-10 year)	Over 10 years	Total
1331	St James Metro Station		0.45		0.45
1328	Strawberry Place		0.32	0.32	0.64
1313	East Pilgrim Street Masterplan Area		1.50	1.50	3.00
1076	Plot 12 Quayside		0.29		0.29
3064	Maling Street		0.15		0.15
1400	Stephenson Quarter	1.00			1.00
1384	Safestore (former Heron's Garage)			0.34	0.34
1374	Forth Goods Yard			1.38	1.38
1398	South of Pottery Lane			1.50	1.50
4329 & 4330	NCC Coach Park & WH Smith Depot		0.39		0.39
4709	Newcastle City Heliport			0.77	0.77
5290	Lower Steenberg's Yard		0.31		0.31
	City Centre Total	1.88	4.29	6.69	12.86
	Newcastle East				
4576	C A Parsons Works, Shields Road	2.05			2.05
3210	Siemens, Shields Road North		3.23		3.23
3052	Siemens, Shields Road South		6.41		6.41
5294	Neptune Energy Park (Phase 3)	5.59			5.59

		Employment Land Supply Net Area (ha)			
Land Resource Reference Number	Area	Immediately available (0-5 year)	Minor Constraints (6-10 year)	Over 10 years	Total
5234	Land at former Neptune Yard (Neptune Energy Park Phase 2ii)	2.10			2.10
4476	Land at junction of Abingdon Road and Fisher Street	0.97			0.97
5253	Shepherds Offshore land on former Neptune Yard off Fisher Street	1.67			1.67
4250	Rhodes Street, Walker		1.15		1.15
4438	Dobson's Yard, Wincomblee Road			0.85	0.85
4721	Wellstream Naval Yard, Wincomblee Road	1.77			1.77
	East Total	14.15	10.79	0.85	25.79
	Newcastle Total	21.69	44.51	34.97	101.15

11.30 The ELR has also looked at the need to consider alternative uses for existing B-class allocations, in particular for waste and recycling. This was a technical exercise and the findings of the study do not imply local community support or owner agreement to such a use. Seven sites have been identified as appropriate for waste management facilities and bad neighbour uses e.g. sorting facilities, scrap yards. In particular, the existing strategic waste management sites at Benwell and Byker will need to be safeguarded within the Local Plan.

Recommendations for Development and Allocations DPD

Introduction to Development and Allocation DPD

11.31 The Development and Allocations Plan will be the second main Local Plan document to be produced. It will use the strategic guidance provided by the Core Strategy and Urban Core Plan (e.g. on the type, the quantity and broad location of where new development should go) to identify and allocate sites for uses which

conform to the Core Strategy's approach.

Recommendations

- 11.32 Preparation of the Development and Allocations Plan is underway. It is important that the evidence base for the Development and Allocations Plan is up-to-date and therefore annual monitoring is essential.
- 11.33 The study recommends that 23 of the ED sites reviewed should be considered as Primary Employment Area's for inclusion within the Site Allocations DPD. This is so that they receive statutory development plan designation which protects them for B1c (Light Industrial), B2 (General Industrial) and B8 (Storage and Distribution) Use Class Order uses.
- 11.34 The study recommends the initial review of the city's non-ED office, industrial and warehousing sites is built upon so that a more detailed assessment is undertaken of their 'market attractiveness' and 'sustainability'. This will help determine their importance both to the economy of the local area and to meeting the city's industrial and warehousing needs over the plan period. It will also help assess whether they would benefit from statutory development plan designation in the Development and Allocations Development Management Document, which protects their current industrial and warehousing use. In order for this additional assessment to be practicable it is recommended that it is carried out in prioritised locations; for example, Regeneration Growth Areas or areas with the lowest job/workforce ratio.

Recommendations for employment land monitoring and future ELS reviews

Introduction

- 11.35 In the Government guidance for Employment Land Review monitoring there are minimum recommendations for employment land monitoring by local authorities. This predominantly relates to employment land supply and demand information.
- 11.36 The minimum requirements are as follows:
1. employment land and premises database;
 2. employment permissions granted, by type;
 3. employment permissions developed by type, matched to allocated sites;
 4. permissions and development of sites and premises previously in employment use for non-employment uses;
 5. employment land and premises available and recent transactions;
 6. employment premises enquiries (if the authority has an estates or economic development team);
 7. employer requirements and aspirations (from focus groups, forums or periodic surveys).

- 11.37 The North East Business Accommodation Project database monitors the availability of sites (the first part of category 5) and employment premises enquiries (category 6).
- 11.38 An absence of a comprehensive employment land and premises database (Category 1) has presented certain difficulties during the process of undertaking the ELR, for example, in terms of identifying non-ED employment sites.

Recommendations

- 11.39 The Government's National Planning Policy Framework, at Paragraph 22 states:

“Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities”.

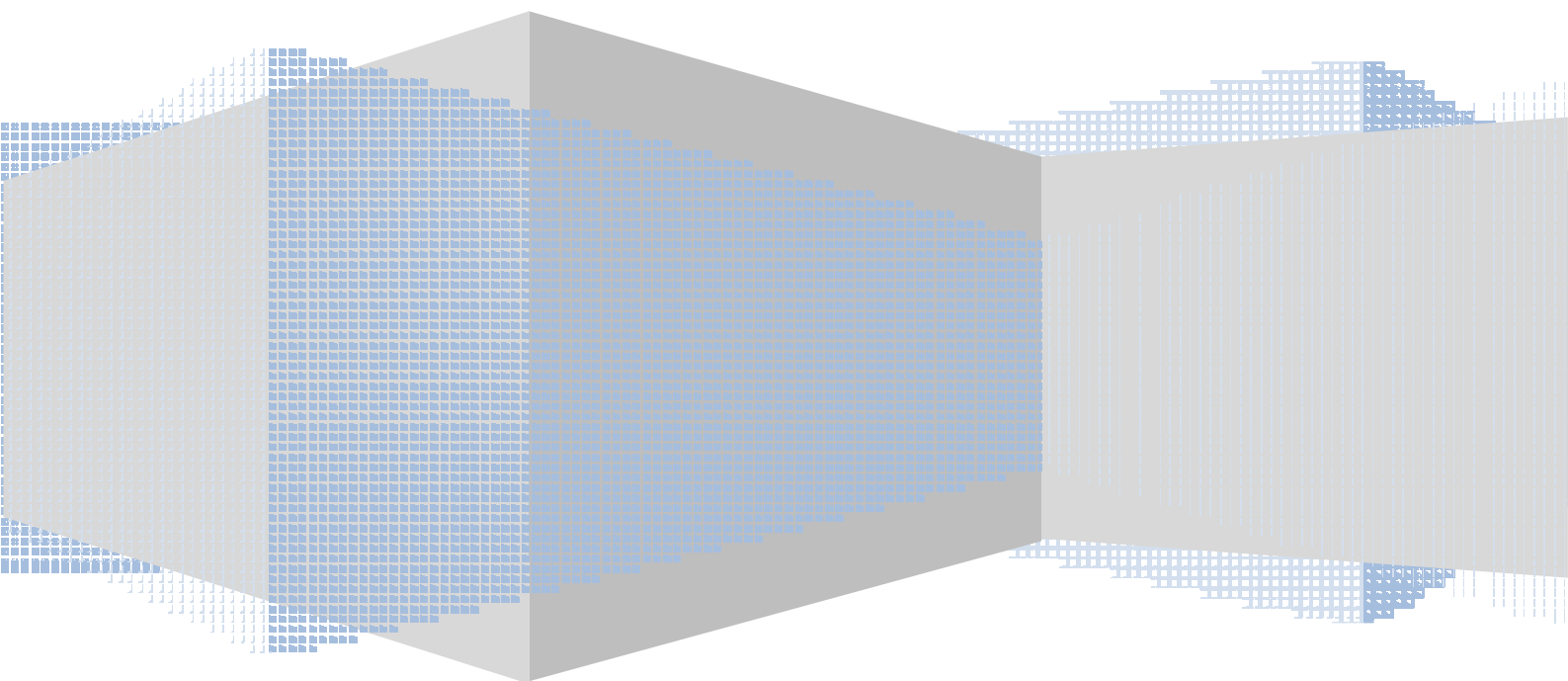
- 11.40 In the spirit of adopting the NPPF approach it is recommended that a comprehensive land and premises database is established.
- 11.41 To ensure that this new comprehensive database is up-to-date and assists the performance monitoring of the Local Plan, it is also recommended that the physical condition survey carried out for the ELR is carried out every three years as part of a rolling ELR review.
- 11.42 In conclusion, it is imperative that future monitoring, using a comprehensive employment land database, is undertaken on regular ongoing basis to ensure that the information gathered and analysed for this review continues to be meaningful over the life of the Local Plan.
- 11.43 Finally, the ELR also recommends that consideration should be given to future ELRs being carried out jointly by the Tyne & Wear authorities, or at least a joint study between Newcastle City Council and Gateshead Council. A joint ELR has not been possible on this occasion due to differing Local Plan timetables but could be useful to ensure the most resource-efficient approach to covering often closely-connected, cross-boundary employment and economic issues.

Newcastle City Council

Employment Land Review

Appendices

January 2014 Update



APPENDICES

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Appendix A - Existing employment sites proforma

Ref:	Site Name:	Area:
Description:		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition		
2) Levels of occupancy		
3) Accessibility, servicing & circulation		
4) Constraining land uses		
5) Access to the strategic road network		
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility		
7) Social development		
8) Jobs/workforce ratio		
9) Regeneration policy		
10) Environmental constraints		
Other considerations:		
Redevelopment/improvement potential:		
Conclusions:		

TOTAL SCORE

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business

Use Class Proportions

B1	B2	B8	A1	A5	C3	D1	D2	SG	Vacant

Appendix B - Methodology for ranking existing employment sites

Establishing site appraisal criteria

In accordance with the Government guidance on Employment Land Reviews, appraisal criteria was established which assessed each ED site against a range of indicators for a) its attractiveness to the market and b) its contribution to sustainable development and strategic planning/regeneration considerations.

In total, over 37 characteristics were recorded, ranging from site constraints to utility capacity issues. In order to allow for meaningful comparison of the data, the findings were refined down into ten categories:

- Physical condition
 - Levels of occupancy
 - Accessibility, servicing and circulation
 - Constraining land uses
 - Access to the strategic road network
 - Public transport accessibility
 - Social development
 - Jobs/workforce ratio
 - Regeneration policy
 - Environmental constraints
 - Redevelopment/improvement policy
-

Each site was assessed against these criteria, for each factor, given a ranking of 1 (poor), 3 (average) and 5 (good). The information and scoring for each site, along with a site plan and methodology can be found on site inspection proformas can be found in Appendices A, B and C.

These categories were purely indicative to provide an estimation of the overall quality of the potential supply of the sites. In addition, the most appropriate use was recorded and any constraints on delivering them, were noted.

The site assessments were then pulled together and ranked to categorise sites as being good, average or poor in terms of overall quality and attractiveness. The ranking of sites is based on the relative performance of sites. Although these rankings are a good indication of site quality and suitability, other considerations need to be taken into account in identifying a portfolio of sites such as their potential for a particular business type of use and deliverability/timescale factors.

The following sections consider the sites in the City's main employment areas. Details of each assessment are contained in Appendix C. The assessment provided and the recommended portfolio of sites is presented as evidence to inform the preparation of the Newcastle LDF. It does not constitute Council policy, and future employment allocations will be determined through the Site Allocations Development Plan Document as part of the LDF.

Site appraisal criteria

Market attractiveness indicators

Indicator 1 – Physical condition

Surveyors graded the physical condition of the buildings within existing UDP employment allocations. A grading of either 'Excellent', 'Good', 'Fair' or 'Poor' was given for each site.

The physical condition of buildings was considered a useful indication of market attractiveness in that a concentration of 'poor' condition buildings (i.e. buildings in an advance state of disrepair, non-wind and water-tight etc) could reasonably indicate a lack of market interest. Conversely, 'excellent' conditions (i.e. new or refurbished premises with little or no signs of wear and tear) could also reasonably be a sign of a site or an area's market attractiveness as it reflects investor confidence that the building will be occupied once built or refurbished.

Indicator 2 – Levels of occupancy

Site surveyors identified those units in each allocation which were vacant as evidenced by both a 'To Let/For Sale' sign being visible on the premises being noted on the site. Further research was undertaken by way of a desk-top study using on industry websites FOCUS and EGi, to identify sites which were not being actively marketed.

The level of occupancy of each allocation was considered to be a valid indicator of market attractiveness. For example, high rates of vacancy could reasonably reflect market disinterest by an unwillingness to occupy premises within the allocation.

Site surveyors obtained information on commercial yields (i.e. the capital value in relation to the expected market rental). This information (used with care) was helpful in demonstrating the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.

Surveyors also examined land values, and the length of time key sites have remained undeveloped. Data on changes in land value and how long key town centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be frames and inform planning decisions.

Indicator 3 – Servicing and circulation

Surveyors were asked to record any problems encountered on site regarding layout, servicing and internal circulation with the allocation. Narrow restricted site layouts which lead to difficult access for Heavy Goods Vehicles attempting to service the site can restrict the operational efficiency of, especially, warehousing/distribution operations. This could therefore reduce its attractiveness to the market.

Indicator 4 – Constraining Land Uses

Aerial photography was employed to note any adjacent residential land uses which could constrain the operation of the allocation for future use. This was considered to be a useful indicator of the allocations market attractiveness; for example, many modern industrial and warehouse occupiers favour site without neighbouring residential dwellings as this has less potential to restrict their round-the-clock operation through disturbance and noise.

Indicator 5 – Access to the strategic road network

Aerial photography and GIS were used to identify the ease of access from the allocation to the strategic road network (i.e. A-roads). This was judged to be a reasonable proxy for market attractiveness as many modern industrial and warehousing users favour good access (i.e. being nearby) to major roads to optimise efficiency of operation through the rapid receipt of delivery of essential goods and products.

Sustainability indicators

Public transport accessibility

NCC LTP team utilised computer software to identify the number of economically active people aged 16 to 74 within 30 minutes of each employment site by public transport. The sites were graded A – E according to how accessible by public transport they were. The grading was indicated in the table below:

Accessibility grades

Number of economically active people aged 16 – 74 within 30 minutes of each employment site by public transport	Accessibility Grade
120,000 – 150,000 people	A
90,000 – 120,000	B
60,000 – 90,000	C
30,000 – 60,000	D
0 – 30,000	E

This indicator was chosen as it is important for people to have access to workplaces by good public transport services as this reduces private journeys, pollution, congestion, etc in accordance with Government planning policy.

Indicator 7 – Social development

The Super Output Area (SOA) of each employment site was identified using GIS. GIS was then used to identify when an allocation contained a site within a SOA which was within either the most 10% or most 20% socially and economically deprived in England.

This was considered a useful indication of the allocations 'sustainability' because it would be beneficial to retain jobs in those SOA with the higher levels of social and economic deprivation. This is because increased employment opportunities could potentially help to address this deprivation. Newcastle contains 53 SOAs which are within the 10% to 20% most deprived in England. Retaining employment opportunities in those areas could be particularly beneficial.

Indicator 8 – Jobs/workforce ratio

The SOA of each employment allocation was identified using GIS. The jobs/workforce ratio for each SOA was then identified from the 2001 Census using GIS.

This indicator was used as it illustrates a lack of local employment opportunity. Therefore where a low jobs/workforce ratio was recorded (e.g. less than 1 job per resident in the workforce) it could be more beneficial to retain jobs in these employment areas. Once the ratio of 1 is exceeded (i.e. there was a balance of jobs and economically active residents in an area) then it is less beneficial as the existing excess of jobs over workforce could be exacerbated by the location of further employment in the area. This in turn could lead to pressure for increased inward commuting into the area.

Indicator 9 – Regeneration policy

GIS was used to identify whether employment allocations were within areas which were the focus of formal social, environmental and economic regeneration activity: namely, the City's Regeneration Growth Areas.

This was considered a relevant factor as it would be beneficial to retain employment opportunities in areas where the need for regeneration has formally been organised.

Indicator 10 – Environmental constraints

GIS was used to identify allocations where one or more of the following environmental constraints and UDP policy designation was present: the Environment Agency's Flood Zone 3; Site of Special Scientific Interest; Site of Nature Conservation Importance; Local Nature Reserve; Green Belt; Ancient Woodland; Common Land; Scheduled Ancient Monument; Listed Building.

This indicator was used because the continuation (and intensification) of industrial and warehousing activity in employment areas with these designations could potentially threaten the integrity of the environmental assets within them. (Equally, this indicator could reduce the market attractiveness of the employment allocation as businesses might be reluctant to invest if there were significant constraints on their operation).

Ref:	Site Name:	Area:
Description:		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Surveyors graded the physical condition of the buildings within existing UDP employment allocations. A grading of either 'Excellent', 'Good', 'Fair' or 'Poor' was given for each site.	
2) Levels of occupancy	Site surveyors identified those units in each allocation which were vacant as evidenced by both a 'To Let/For Sale' sign being visible on the premises being noted on the site. Further research was undertaken by way of a desk-top study using on industry websites FOCUS and EGi, to identify sites which weren't being actively marketed.	
3) Accessibility, servicing & circulation	Surveyors were asked to record any problems encountered on site regarding layout, servicing and internal circulation with the allocation. Narrow restricted site layouts which lead to difficult access for Heavy Goods Vehicles attempting to service the site can restrict the operational efficiency of, especially, warehousing/distribution operations. This could therefore reduce its attractiveness to the market.	
4) Constraining land uses	Aerial photography was employed to note any adjacent residential land uses which could constrain the operation of the allocation for future use.	
5) Access to the strategic road network	Aerial photography and GIS were used to identify the ease of access from the allocation to the strategic road network (i.e. A-roads). This was judged to be a reasonable proxy for market attractiveness as many modern industrial and warehousing users favour good access (i.e. being nearby) to major roads to optimise efficiency of operation through the rapid receipt of delivery of essential goods and products..	

Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	NCC LTP utilised computer software to identify the number of economically active people aged 16 to 74 within 30 minutes of each employment site by public transport. The sites were graded A– E according to how accessible by public transport they were. The grading was indicated in the table below:	
7) Social development	The Super Output Area (SOA) of each employment site was identified using GIS. GIS was then used to identify when an allocation contained a site within a SOA which was within either the most 10% or most 20% socially and economically deprived in England.	
8) Jobs/workforce ratio	The SOA of each employment allocation was identified using GIS. The jobs/workforce ratio for each SOA was then identified from the 2001 Census using GIS.	
9) Regeneration policy	<p>GIS was used to identify whether employment allocations were within areas which were the focus of formal social, environmental and economic regeneration activity; namely, the city's Regeneration Growth Areas.</p> <p>This was considered a relevant factor as it would be beneficial to retain employment opportunities in areas where the need for regeneration has formally been organised.</p>	
10) Environmental constraints	GIS was used to identify allocations where one or more of the following environmental constraints and UDP policy designation was present: the Environment Agency's Flood Zone 3; Site of Special Scientific Interest; Site of Nature Conservation Importance; Local Nature Reserve; Green Belt; Ancient Woodland; Common Land; Scheduled Ancient Monument; Listed Building.	
Other considerations:		
Redevelopment/improvement potential:		
Conclusions:		

TOTAL SCORE	<input type="text"/>
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(Scoring: 5 = best, 1 = worst)

Appendix C - Existing Employment Site Scores (Health Checks)

Ref: ED3.1 (2)	Site Name: Airport Industrial Estate	Area: 11.5ha
Description: Well established industrial estate comprising 91 units surrounded by retail shopping.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Steel framed construction including some brick built offices. Hadrian Business Centre is currently being refurbished. Land to rear has been cleared. Some units have outside storage	Excellent 5
2) Levels of occupancy	High level of voids within smaller units. Office spaces are being actively marketed by Whittle Jones and the Northern Trust. Incentives and flexible terms available.	Average 3
3) Accessibility, servicing & circulation	Good, well designed with the end user in mind, with sufficient allocated parking. Serviced by Kingston Park Metro.	Good 4
4) Constraining land uses	A1 abuts site.	Average 3
5) Access to the strategic road network	Excellent access to the A1.	Excellent 5
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	101,000 economically active within 30 minutes of site by public transport.	Good: Accessibility: Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.1 – 0.3 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	3
9) Regeneration policy	The site is not in a Regeneration Growth Area.	3
10) Environmental constraints	Wildlife corridor abuts eastern boundary.	3
Other considerations: Site benefits from the agglomeration effect with the concentration of similar uses at Kingston Park Retail Park. (4)		
Redevelopment/improvement potential: Site could be redeveloped comprehensively in the longer term. (3)		
Conclusions: De-allocate, high proportion of A1 users and voids. Further retailing will be resisted due to the out of town location.		

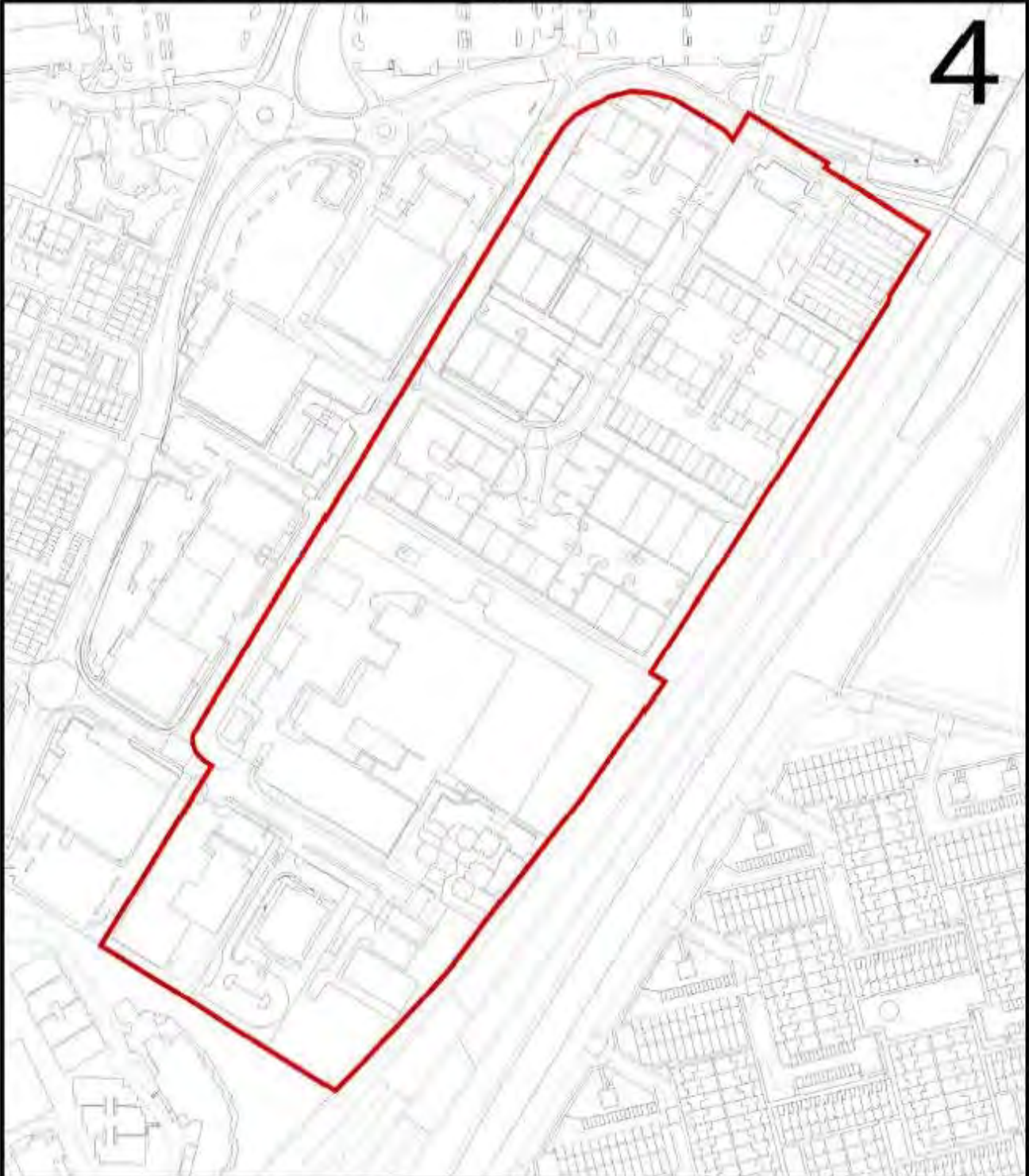
TOTAL SCORE | 46**(Scoring: 5 = best, 1 = worst)**

Use	Business	Use	Business	Use	Business
A1	Geordie Bakers	A1	Designer Contracts	A1	Kingston Lighting
A1	PJ Carpets	A1	Tots to Teams Clothing	A1	Kingston Sofa Workshop
A1	On Spec Optical	A1	Maple Leaf Clothing	A1	Bow Wow
A1	The Rock Warehouse	A1	Fire Studio	A1	New Karpet Mills
A1	Clavering Stationers	A1	Body Max	A1	Sandra Gallon Curtains
A1	Hair and Beauty Supplies	A1	Homebase		
A5	Sunrise Express				
B1	Freedom Link	B1	Clearview	B1	Advance Installations
B1	Qualitas	B1	Sporting ID	B1	Lifestyle
B1	Park House Health Care	B1	Cheviot Homes	B1	Bernica
B1	Swift Fire & Safety	B1	Designer Contracts	B1	Tots To Teams
B1	Kingston Sofa Workshop	B1	Kingston Property Services	B1	Smailes and Hammant Ltd.
B2	Callerton Kitchens and Interiors	B2	Bathroom Studio	B2	Sekura Window Centre Ltd
B2	Premier Meats	B2	Dolphin Stair Lifts	B2	The Kitchen Centre
B2	Cavendish Kitchens and Bedrooms	B2	Alan Neal Graphics	B2	Sign Pro
B2	Aurora Digital Print Ltd	B2	Universal AV Services Ltd.	B2	Blade Printers
B2	Trains and Planes Ltd.	B2	Fleming and Company (Machinery) Ltd.	B2	Statex Colour Print
B8	Howdens Joinery Co.	B8	St Oswald Hospice	B8	Plumb / Parts Center
B8	D & K Plant Hire	B8	Hydroponic Warehouse	B8	Border Heating Spares
B8	Clavering Stationers	B8	Dolphin N E Stair Lifts	B8	T D Fixings
B8	Scott Tool Hire	B8	City Electrical Factors Ltd	B8	Screwfix
B8	Plastic Centre				
D1	Tyneside Training Services Ltd				
SG	Kingston Park Trade Cars	SG	Kenton Motor Services	SG	Territorial Army

Use Class Proportions

B1	B2	B8	A1	A5	C3	D1	D2	SG	Vacant
18%(15)	18%(15)	15%(13)	20%(17)	1%(1)		1%(1)		2%(2)	24%(20)

4



Address : Airport Industrial Estate

Area (Ha) : 11.5

Map :NZ 2168

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Drawn By
J McLaughlin

Ref: ED3.1 (1)	Site Name: Albion Row	Area: 0.9ha
Description: Also includes Byker Development Centre and St Michael's Workshops. Good quality, low cost workshop and office units to people starting up business.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Well maintained, purpose built workshops and offices for small to medium business.	Good 4
2) Levels of occupancy	Albion Row is managed by NCC Property Services and has 5 lets at present – 2 smaller and 3 medium.	Good 4
3) Accessibility, servicing & circulation	Access, servicing and circulation is good, with allocated parking and a secure fence surrounding site.	Good 4
4) Constraining land uses	Adjacent to residential.	Average 3
5) Access to the strategic road network	Access to Central Motorway via City Road.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	162,000 economically active people within 30 minutes of site by public transport.	Good: Accessibility: Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	Site lies within a Regeneration Growth Area	5
10) Environmental constraints	Wildlife corridor to the north. Protected open space to the south.	3
Other considerations: Primarily B1 & B2 uses. (3)		
Redevelopment/improvement potential: Refurbishment will be required in the future. (3)		
Conclusions: Retain, potential to consolidate Albion Row, Hoult's Yard and Riverside East into a single allocation going forward. (4)		

TOTAL SCORE	46
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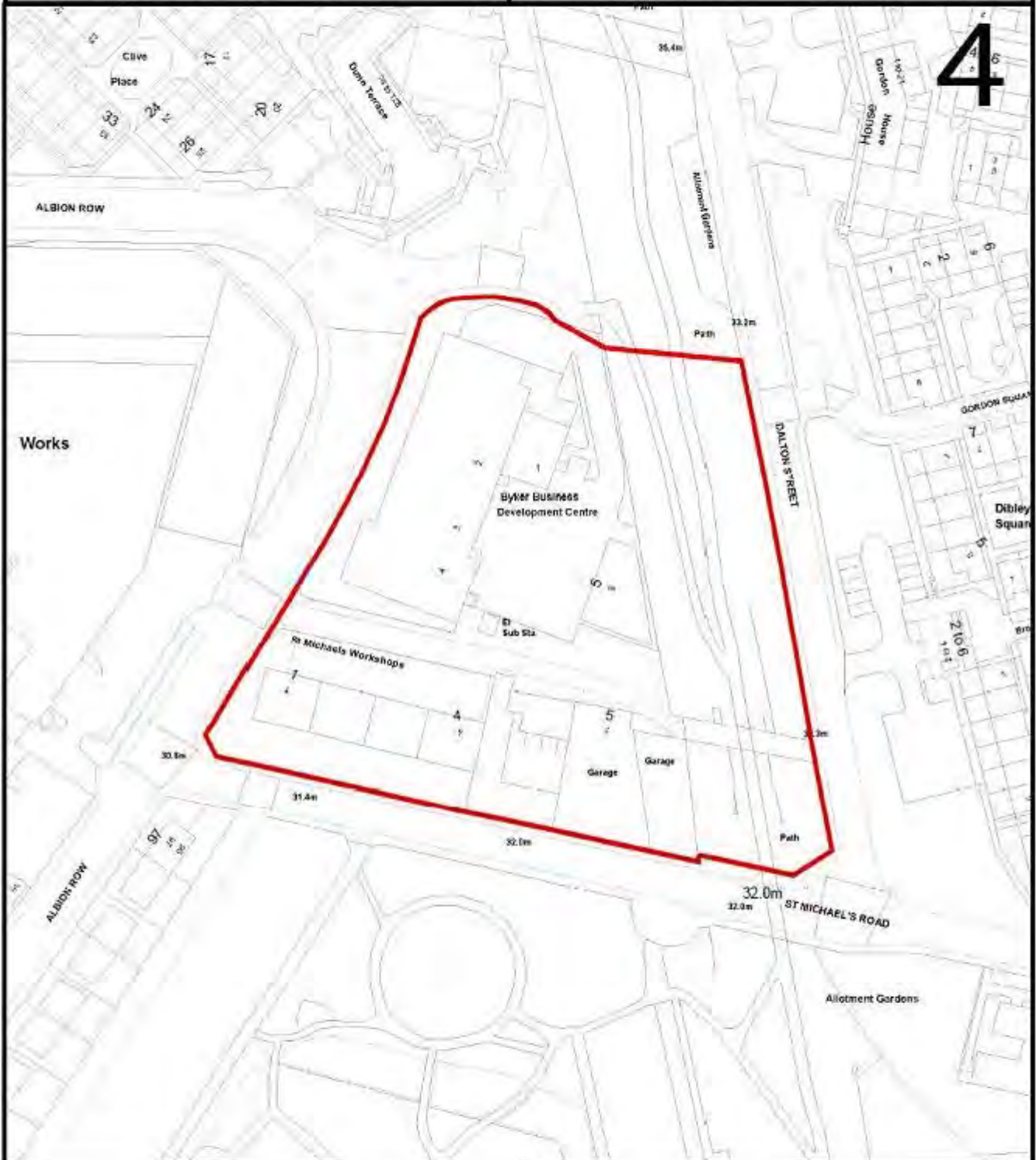
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Pigeon Health Products and Corn Shop				
B1	Renwick Framing	B1	Renwick Flooring	B1	Branch Design
B1	Co – Signs	B1	The Model Group	B1	Steve Morris Furniture
B1	Selex Elsay	B1	Amanda Baker Soft Furnishings	B1	Fitted Furniture Supplies Ltd.
B1	Image Works	B1	L.M.C Curry	B1	Absolute Design
B1	Newcastle City Council - Byker Business Development Centre				
B2	Tyne Machine Tool Services Ltd.	B2	North East Trimmers Ltd	B2	Make Believe
B2	Home Charm Blinds	B2	Total Pump Solutions	B2	Home Charm Blinds
B2	Rad Fan	B2	P.L.Pine Furniture	B2	R.D.Precision Engineering
SG	Albion	SG	New Princess Motors		
B8	Parts Centre				

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	D2	SG	Vacant
42%(13)	29%(9)	3%(1)	3%(1)					6%(2)	17%(5)

4



Address : Albion Row Industrial Estate

Area (Ha) : 0.9

Map : NZ 2664 SE

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Drawn By:
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Ref: ED3.1 (3)	Site Name: Armstrong Industrial Estate	Area: 3.14ha
Description: The estate comprises a number of terraced high quality business units, constructed over a single storey steel portal frame construction under pitched metal decked roofs.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern, affordable units in average to good condition. Estate is well maintained and tidy.	Average 3
2) Levels of occupancy	High number of voids being actively marketed.	Fair 2
3) Accessibility, servicing & circulation	Access through Business Park. Servicing and circulation are good, with large internal roads making it easy access for larger vehicles.	Good 4
4) Constraining land uses	Newcastle Business Park to the north and west; River Tyne to the south.	Average 3
5) Access to the strategic road network	Via Scotswood Road A695, which provides easy access to A1 and city centre.	Excellent 5
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	139,000 economically active people within 30 minutes of site by public transport.	Good: Accessibility: Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site lies within an area of Strategic change	5
10) Environmental constraints	Wildlife corridor abuts northern boundary.	4
Other considerations: The site suffers as there is no frontage onto Scotswood Road. (3)		
Redevelopment/improvement potential: Potential refurbishment in the longer term. (3)		
Conclusions: Evidence suggests that smaller units have suffered the most as a result of the recession. It is anticipated that floorspace will be taken when the market returns, as although the site has no frontage onto Scotswood Road it benefits from the agglomeration of similar users along Scotswood Road and the Business Park. Retain		

TOTAL SCORE | 46

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Salon Services				
B1	Autotint				
B2	Document and Graphics Centre	B2	Falconer Brown Cater Hire	B2	Cable and Wireless
B8	Electric Center	B8	Plumb Center	B8	Blackwells Distribution Centre
B8	J & P Hardware Ltd	B8	Grace Landscape	B8	Dean & Wood Ltd
B8	Cannon Hygiene Ltd	B8	NDS Distribution		
D1	Newcastle College Motor Vehicle Centre (3 Units)				
SG	Arnold Clark Parts				

Use Class Proportions

B1	B2	B8	A1	A2	D1	SG	Vacant
4%(1)	13%(3)	35%(8)	4%(1)		13%(3)	4%(1)	26%(6)

Ref: ED3.1 (4)	Site Name: Bells Close Industrial Estate	Area: 3.8ha
Description: Bells Close Industrial Estate comprises a number of pitched roofed, single storey units constructed of brick and blockwork cavity walls.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Units are in average condition and look outdated - but estate is tidy and well maintained.	Average 3
2) Levels of occupancy	4 vacancies, primarily smaller units.	Average 3
3) Accessibility, servicing & circulation	Good access from Scotswood Road. Servicing and circulation are average. Ample parking and easy access for larger vehicles.	Good 4
4) Constraining land uses	Residential to the western boundary.	Average 3
5) Access to the strategic road network	Bells Close Industrial Estate is strategically located off Scotswood Road approximately 4 miles to the West of Newcastle City Centre and within ½ mile of the Newcastle A1 Western Bypass.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	80,000 economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade C (3)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Strategic Area of Change.	4
10) Environmental constraints	Wildlife corridor running across the north of the site which is adjacent to allocated open space.	2
Other considerations: The site benefits form a prominent location, fronting Scotswood Road. (3)		
Redevelopment/improvement potential: Allocated for industrial and commercial improvements under Policy ED4.1. Potential refurbishment in the longer term. (3)		
Conclusions: Retain		

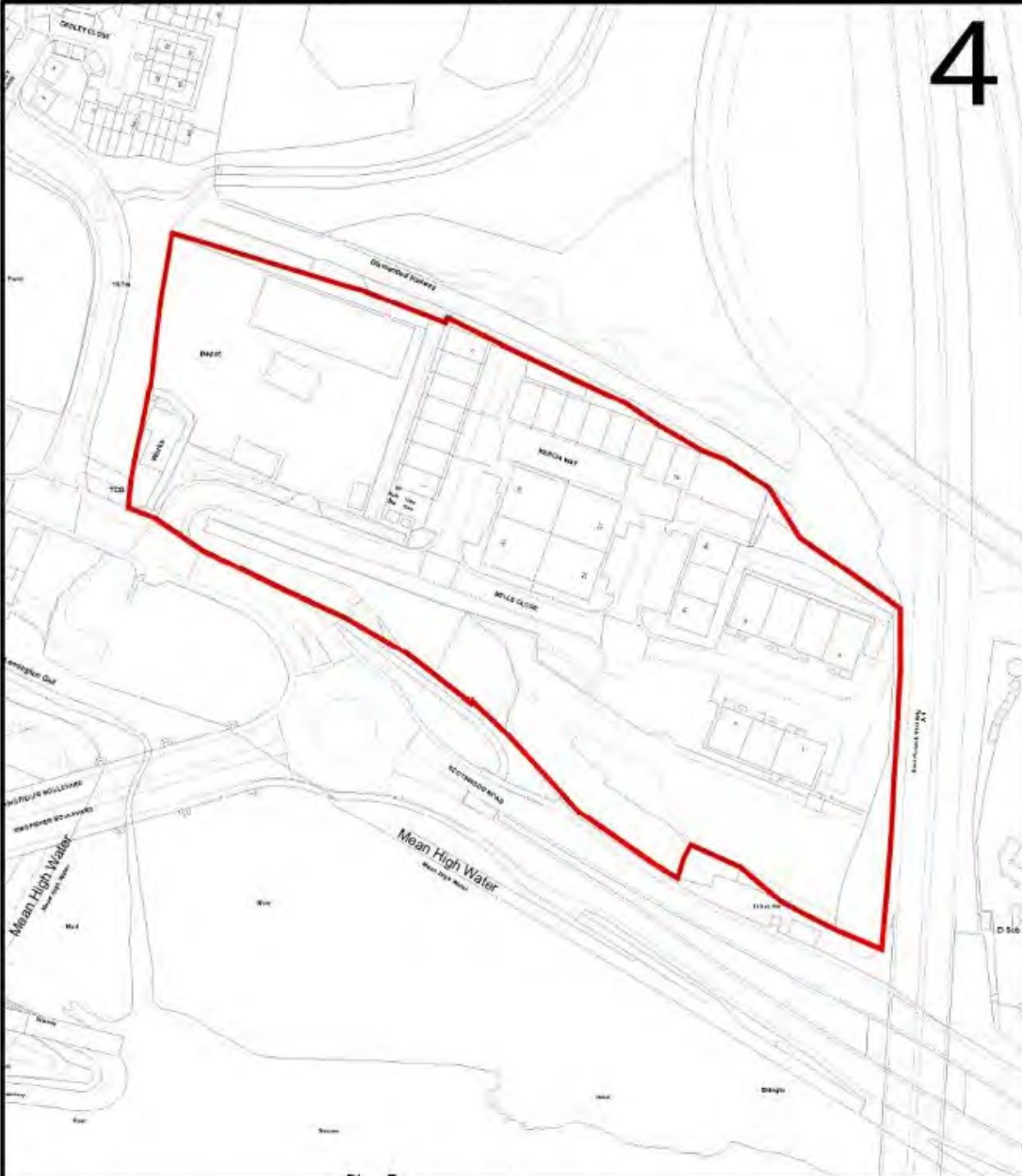
TOTAL SCORE	41
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Budget Buy Tyres	A1	Darnell Trade prices		
A5	Treasure Express 2				
B1	Franklins Print	B1	A.P.S Printers	B1	K.S. Designs Fireplaces
B2	Advanced Automotive Systems	B2	J.R. Jams	B2	North East Mouldings
B2	RSL Steeper	B2	Advanced Radiators	B2	All Gear Products
B8	FHM Distribution	B8	Bells Security and Transport	B8	Northumbrian Car And Commercial
SG	Daley Express Ltd.	SG	Bramble Van Rental	SG	Hunters Motorcare

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C1	C3	D1	SG	Vacant
14%(3)	27%(6)	14%(3)	9%(2)			5%(1)				14%(3)	18%(4)



Address : Bells Close Industrial Estate

Area (Ha) : 3.8

Map : NZ 1964 SW

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Drawn By:
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Ref: ED3.1 (5)	Site Name: Bakery, Ponteland Road	Area: 0.8ha
Description: Single user, closed and redeveloped for housing.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	N/A	N/A
2) Levels of occupancy	N/A	N/A
3) Accessibility, servicing & circulation	N/A	N/A
4) Constraining land uses	N/A	N/A
5) Access to the strategic road network	N/A	N/A
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	141,000 economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5).
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	Good.
8) Jobs/workforce ratio	N/A	N/A
9) Regeneration policy	N/A	N/A
10) Environmental constraints	N/A	N/A
Other considerations: N/A		
Redevelopment/improvement potential: Single user, closed and redeveloped for housing.		
Conclusions: Single user, closed and redeveloped for housing (NA)		

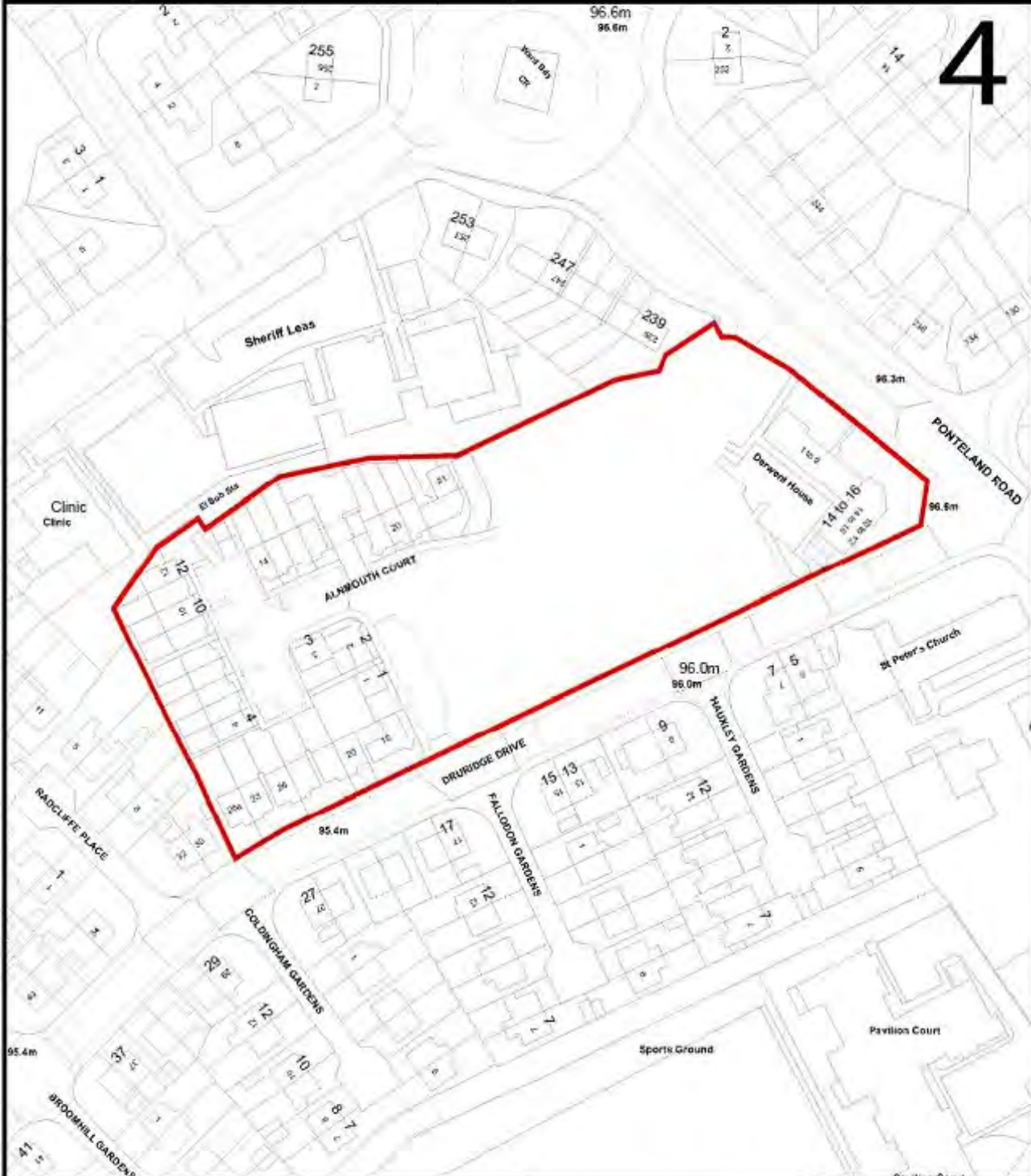
TOTAL SCORE | 0

(Scoring: 5 = best, 1 = worst)

Use	Business
C3	'The Bakery' housing development by Ben Bailey homes.

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
							100%			



Address : Bakery Ponteland Road

Area (Ha) : 0.8

Map : NZ 2166 NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (6)	Site Name: Blucher Industrial Estate	Area: 1.4ha
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Description:

Site is extremely under maintained and all but one unit is vacant. The site is bounded on all but the northern edge by the Green Belt and designated area of exceptional landscape value. An electric substation takes up a large proportion of the site to the south. Non allocated allotment gardens are present on part of the site, with one unit being totally surrounded by gardens.

Market Attractiveness Indicators:

Indicator	Notes	Conclusion
1) Physical condition	The remaining unit is maintained but has significant signs of dilapidation.	Poor 1
2) Levels of occupancy	Only two units remain on this site and both are occupied.	Excellent 5
3) Accessibility, servicing & circulation	Access, servicing and circulation are poor – road into site are very narrow and site car park has significant signs of deterioration.	Poor 1
4) Constraining land uses	Adjacent to Green Belt and residential area.	Poor 1
5) Access to the strategic road network	Isolated location. Access to the A69 via Throckley which links to A1.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	47,000 economically active people within 30 minutes of site by public transport.	Below Average: D (2)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is an 0.2 imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is not located within a Strategic Area of Change.	3
10) Environmental constraints	Adjacent to Green Belt, area of exceptional landscape value. Site of archaeological interest across most of the site.	1

Other considerations: This old colliery area adjoins the former colliery village, the Green Belt and countryside, recreation and landscape designations. (2)

Redevelopment/improvement potential: Site is in need of substantial improvements as is allocated in ED4.1(1). New uses such as housing, could create a better environment and housing. (2)

Conclusions: De-allocate

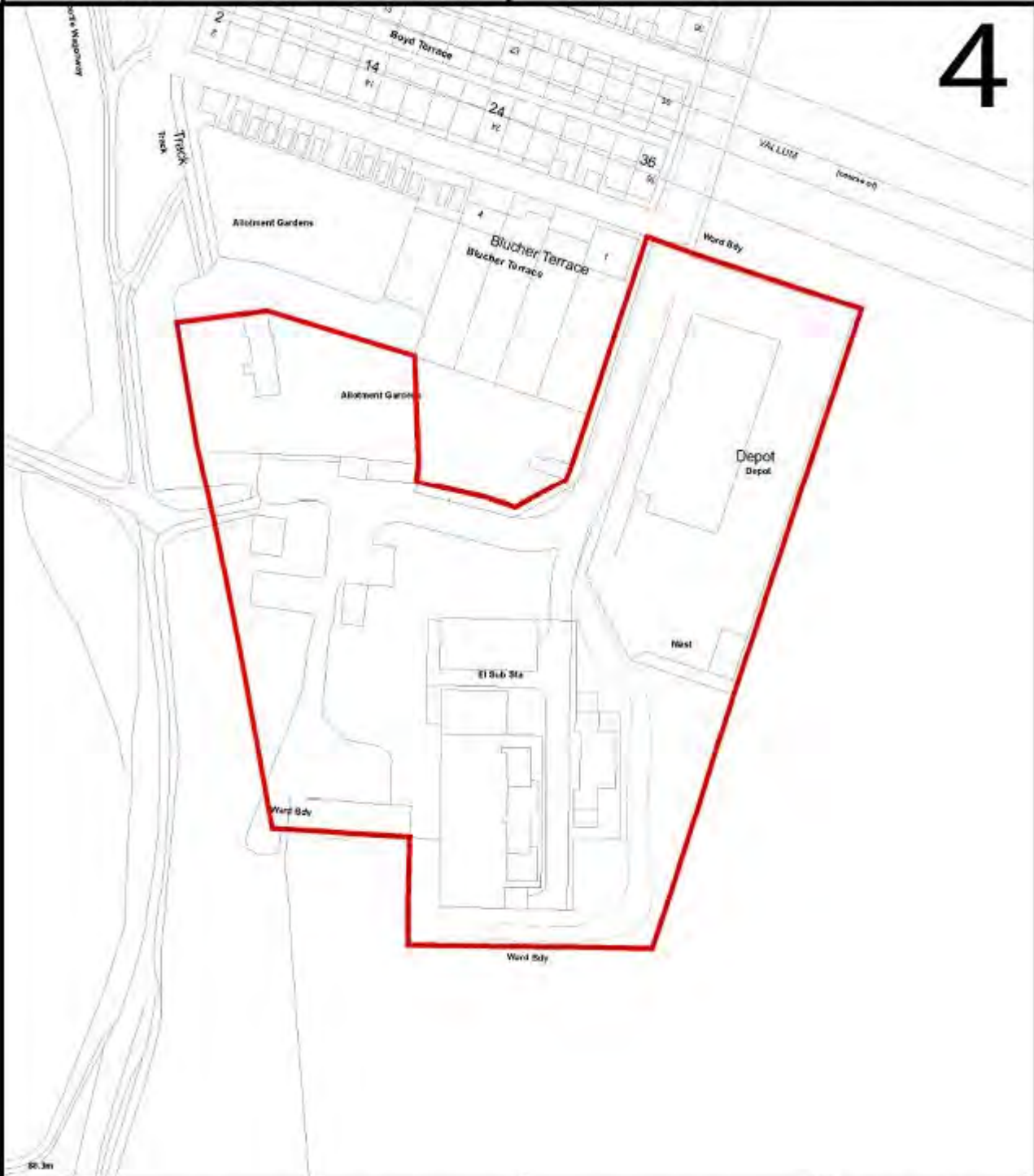
TOTAL SCORE	28
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(Scoring: 5 = best, 1 = worst)

Use	Business
SG	Wright Bros Coach Hire
SG	Blucher MOT Centre

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
									100%(2)	



Address : **Blucher Industrial Estate**

Area (Ha) : 1.4

Map : NZ 1766 SE
NZ 1765 NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (7)	Site Name: Brough Parkway Industrial Estate	Area: 3.1ha
Description: Modern industrial units, adjacent to the City Stadium.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Good industrial estate which is well maintained. Predominantly warehouses; some buildings have additional brick built office space.	Good 4
2) Levels of occupancy	One void that is being actively marketed.	Excellent 5
3) Accessibility, servicing & circulation	Good accessibility that caters for larger vehicles and a large car park. Servicing and circulation good. Close to city centre and Metro stations.	Good 4
4) Constraining land uses	Constrained by housing to the West and Greyhound stadium to South.	Average 3
5) Access to the strategic road network	The estate is accessed from the A187, providing access to the A167 (M) Central Motorway, and to the regions road links including the A1 (M) and A19.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	145,000 economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5).
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Strategic Area of Change.	4
10) Environmental constraints	Open space to the south west. Site of archaeological interest along north of site.	2
Other considerations: Popular and affordable units. (3)		
Redevelopment/improvement potential: The site is part of the Fossway. The Council's Urban Design Team are preparing a strategic framework for the Fossway Development Area. This involves looking at the development blocks on the IRDL and the two Siemens sites, links between them, and to the surrounding area. Improvements to the highway network are crucial to this process. (Comprehensive redevelopment required: 2)		
Conclusions: De-allocate, although the site is likely to remain in employment use for the foreseeable future (4).		

TOTAL SCORE	44
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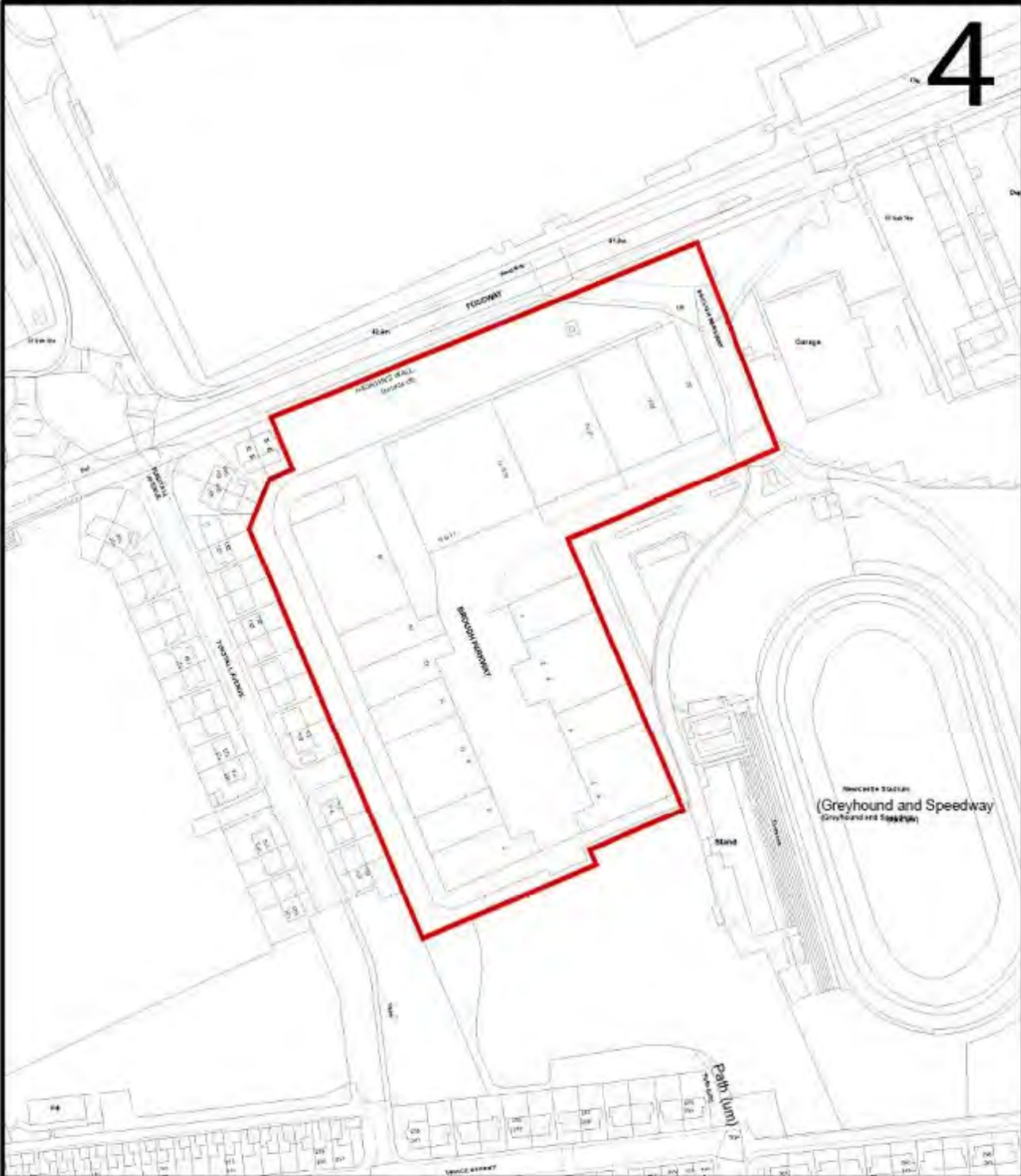
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Dulux Decorator Centre	A1	The New Bridge Street Bedding Centre	A1	Deluxe Flooring
B8	Eyre & Elliston Ltd.	B8	Samaritans Purse International	B8	W Mearns And Company Ltd.
B8	Howdens Joinery & Co.	B8	Ferraris Piston Service Ltd.	B8	Unipart Automative
B8	Samaritans	B8	Andrew Page Ltd	B8	BSP Engineering Solutions
B8	Thomas Owen & Sons Ltd.	B8	Brown Bros Ltd		
V	Void (1)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
		73%(11)	20%(3)							7%(1)

4



Address : Brough Parkway Industrial Estate

Area (Ha) : 3.1

Map : NZ 2765 SE
NZ 2764 NE

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Drawn By:
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Ref: ED3.1 (8)	Site Name: Brunswick Industrial Estate	Area: 19.8ha
Description: Brunswick Industrial Estate comprises a number of terraced industrial/warehouse units of steel portal framed construction. Some units have ancillary office accommodation. Ruby Park is the latest addition to the estate. This development comprises 8 new units being of steel frame construction under dual pitched roofs.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Mixture of units which includes warehouses, office space and industrial facilities. Site has 2 derelict buildings and an area of cleared space. Overall site is well maintained and some units have been refurbished. However, some units look dilapidated.	Good 4
2) Levels of occupancy	Average number of voids (10) for the size of site. These are being marketed through Property Services and independent letting agents. Occupiers on the estate include companies involved in haulage, those allied to the building trade and warehousing.	Average 3
3) Accessibility, servicing & circulation	Access, servicing and circulation are good. Size and layout of estate allows easy access by HGV. More than sufficient amount of allocated parking.	Good 4
4) Constraining land uses	Abuts green belt and residential development. Telecommunications mast on site.	Average 3
5) Access to the strategic road network	½ a mile to the west of Brunswick Village and 5 miles north of Newcastle city centre. Close proximity to airport. Close to A1 with direct link via Sandy Lane.	Excellent 5
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	45,000 economically active people within 30 minutes of site by public transport.	Below Average: Grade D (2)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	3
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2

9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3
10) Environmental constraints	Bordered by green belt on all but the east side. Adjacent to site of archaeological Interest.	2
Other considerations: The recession has had an impact on Ruby Park. It is anticipated that this element of the estate will be fully let when market conditions improve. (2)		
Redevelopment/improvement potential: Land Resource reference 2703 remains undeveloped. (3) Sandy Lane, Brunswick Industrial Estate has been assessed as part of the Council's Waste Site Appraisal and could be an appropriate location for waste management facilities.		
Conclusions: Retain		

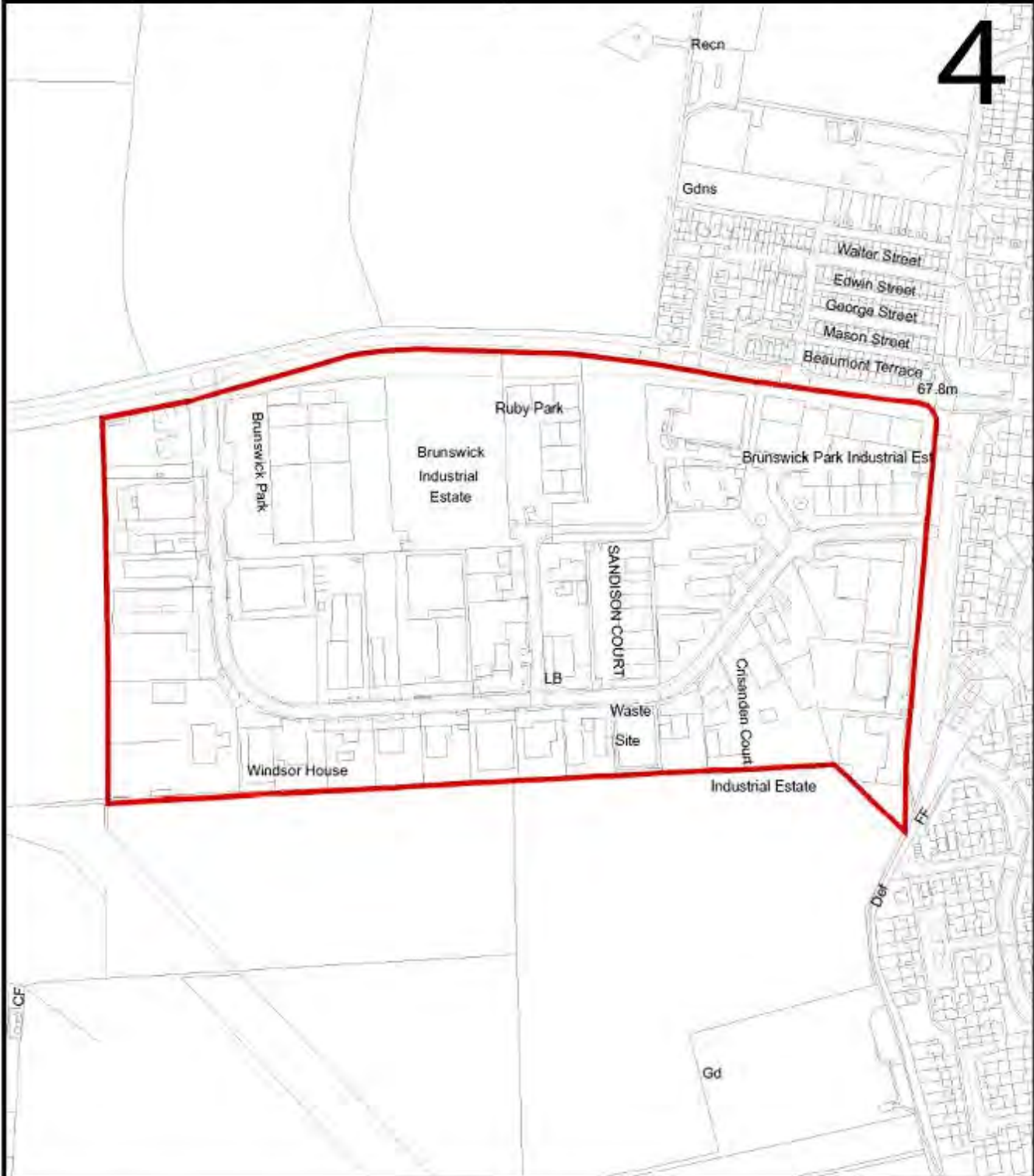
TOTAL SCORE	36
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Tile Stockists	A1	The Revival Company	A1	Brunswick Bedding & Factory Shop
A1	Just Tiling	A1	Carpets Flooring		
A3	Paddy's Dinner				
B1	DFC Automation	B1	Centurion The Automatic Choice	B1	Easi Dec
B1	Brunswick Plastics	B1	Hatton Traffic Management Limited	B1	Moirs Of Gosforth
B1	McArthur	B1	Straightline Construction Co.	B1	Tyne Tees Thermal Ltd.
B1	Thermal Insulator Contractors	B1	Chemplas Ltd.	B1	Select Telecom
B1	ABCOM	B1	Ventilation Direct	B1	Morgan Black Construction
B1	M & C Roofing	B1	Galliford Try	B1	Bennett
B1	Decorative Plaster Co.	B1	Hendersons Accountants		
B2	Cemex Materials UK Ltd	B2	Orange Plant	B2	Communis
B2	Smiles Engineering (NE) Ltd GB Bearings	B2	Tarmac Brunswick Concrete Plant	B2	Dinnington Fencing Co Ltd.
B2	Scott Fencing Ltd.	B2	Construction Cutting Services Ltd.	B2	Brunswick Fencing
B2	Solar Panels	B2	KB Sheet Metal	B2	B.Fitzgibbon & Son Ltd
B2	A1 Fencing and Decking	B2	Revert Ltd.	B2	The Logistix Group
B2	Classical Creations				
B8	Asian Harvest Foods	B8	Redhead Roofing	B8	B.B. Trade Kitchens & Bedrooms
B8	James Burrell Builders Merchants	B8	Pay Less for Storage	B8	Maxhire
B8	George Blackett – Skip Hire	B8	Sandhurst Equipment Rental	B8	Janitorial Supplies
B8	N.A.Park Ltd	B8	Warren Access – Hydraulic Platform Hire	B8	Masterclean
B8	Bob Rudd – Gaming & Amusements	B8	A Plant Tool Hire		
SG	HR Fast Fit	SG	Fleet Automotive Excellence	SG	Northumbrian Vehicle Co. Ltd.
SG	North of England Coachworks	SG	Brunswick Tyres	SG	Jack Ford (Motors) Ltd
SG	Newcastle City Council, Neighbourhood Services				

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	D2	SG	Vacant
25%(18)	23%(16)	18%(14)	7%(5)	1%(1)				10%(7)	14%(10)



Address : Brunswick Industrial Estate

Area (Ha) : 19.8

Map : NZ 2272 NE/SE
NZ 2372 NW/SW

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Drawn By:
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Ref: ED3.1 (9)	Site Name: Condercum Road	Area: 2.73ha
Description: Older general employment area, dominated by Neighbourhood Services depot. Benwell Scotswood AAP.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Older, brick industrial units with some units showing considerable decay. Site looks under maintained.	Fair 2
2) Levels of occupancy	No visible voids.	Excellent 5
3) Accessibility, servicing & circulation	Poor access, servicing and circulation. Site needs roads and parking refurbished. Serviced by bus routes.	Poor 1
4) Constraining land uses	Located in a residential area with allotment gardens and allocated open space to the west of the site. School and ancillary playing fields to the north.	Fair 2
5) Access to the strategic road network	Via West Road or Scotswood Road. Within 2 miles of city centre.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	117,000 economically active people within 30 minutes of site by public transport.	Grade A: 5
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	3
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5
10) Environmental constraints	Allocated open space to the west of site.	3
Other considerations: Redevelopment subject to the relocation of Neighbourhood Services depot. (3)		
Redevelopment/improvement potential: The Benwell Scotswood Area Action Plan identifies the site for mixed use development. Circa 4,650 sqm will come forward for non residential uses. (3)		
Conclusions: Re-allocated for mixed use development		

TOTAL SCORE	37
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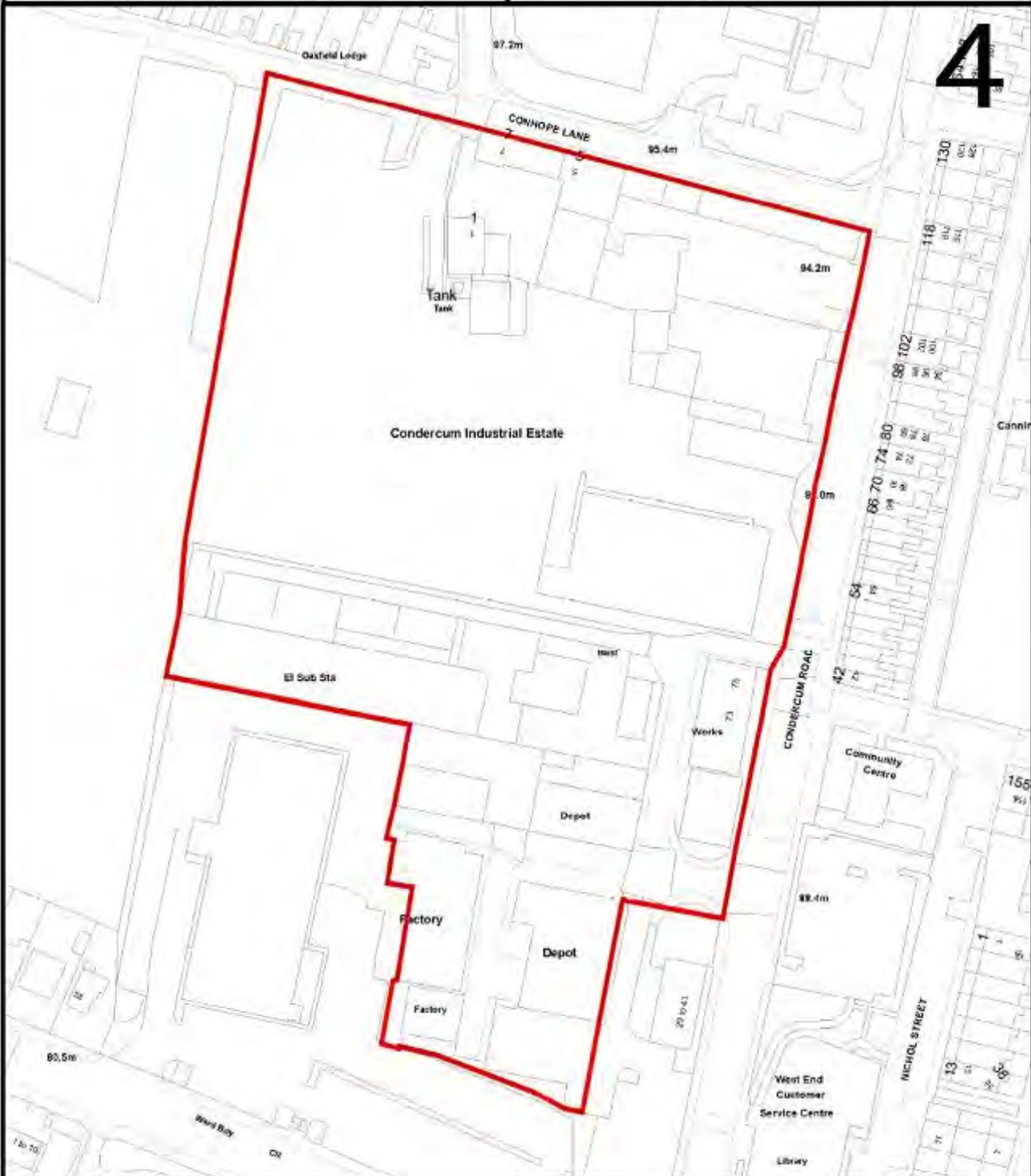
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
B1	Trinity Solutions	B1	Tyne Taxis
B2	Spies Hedoer		
B8	S.Jennings Plant Hire	B8	Neighbourhood Services
SG	Custombilt Cars Ltd	SG	PJs Tyres
SG	Condercum MOT Test Centre	SG	Condercum Coachworks
SG	K.E.Yendell – Motor Engineers		
D1	Kingdom Hall – Jehovah’s Witnesses		

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
18%(2)	9%(1)	18%(2)						9%(1)	46%(5)	(0)

4



Address : Condercum Road

Area (Ha) : 6.2

Map : NZ 2164 SE

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Scale : 1:1,250 @ A4

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Newcastle City Council, 100019569, 2009.

Drawn By:
J McLaughlin

Ref: ED3.1 (10)	Site Name: Fawdon Industrial Estate	Area: 19.8ha
Description: 3 large industrial units surrounded by residential development.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Large scale modern industrial processing units with secure access and allocated parking.	Excellent 5
2) Levels of occupancy	Fully occupied by nationals.	Excellent 5
3) Accessibility, servicing & circulation	Good accessibility albeit through a residential area. Purpose built with provision and layout for HGV and large amounts of traffic. Site is serviced by Fawdon Metro Station.	Good 4
4) Constraining land uses	Metro line runs along the northern boundary. Surrounded by residential.	Fair 2
5) Access to the strategic road network	Close proximity to A1 but no direct access so must go via Kingston Park.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	86,000 economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade C (3)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	4
8) Jobs/workforce ratio	0.2 – 0.3 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	3
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5
10) Environmental constraints	Wildlife corridor runs through the site.	3
Other considerations: Existing occupiers are 'bad neighbour' uses within the context of the surrounding residential area. (2)		
Redevelopment/improvement potential: Site was submitted as part of the SHLAA, and could be developed for housing in the ultra long term, subject to the re-location of the existing occupiers. (Site could be redeveloped for other more appropriate users, when existing occupiers move on - 2)		
Conclusions: De-allocate		

TOTAL SCORE	41
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
B2	Sanofi Aventis Ltd	B2	Crown Specialist Packaging UK Ltd
B2	Nestle UK Ltd		

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	Vacant
	100% (3)						

4



Address : Fawdon Industrial Estate

Area (Ha) : 19,8

Map : NZ 2168 NE
NZ 2268 NW/NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (11)	Site Name: George Street / Blandford Street	Area: 2.6ha
Description: 1960's/70's comprehensive redevelopment area in the City Centre – previously it was popular with the clothing industry and small wholesale distribution businesses, but has declined.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Area undergoing significant redevelopment by Newcastle College, including demolition work on several sites and acquisition of 4 vacant warehouses. In addition to this, road and footpath improvements are taking place to the south of the site. The area has the potential to expand. The remaining buildings on site are in good condition and are well maintained. However, there are some warehouses and office space that are under used and in a state of bad repair.	Good 4
2) Levels of occupancy	Good but significant amount of voids within the office blocks that are being actively marketed.	Average 3
3) Accessibility, servicing & circulation	Excellent accessibility - that is very close to the city centre and close to public transport links such as the Metro and Central Station. Servicing and circulation is good, however the site suffers from excessive street parking.	Good 4
4) Constraining land uses	Surrounded by mixed use area, notably the Discovery Museum and Newcastle College with the later actively developing vacant properties on the site.	Average 3
5) Access to the strategic road network	Good, access to St James's Boulevard and Scotswood Road which links into the A1.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	200,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.2 and 0.4 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	3
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3

10) Environmental constraints	Grade II listed building adjacent to the north west end of Elswick Terrace, although not on site.	3
Other considerations: No demand for existing accommodation. (1)		
Redevelopment/improvement potential: The area which forms part of the Council's Discovery Quarter, is strategically located next to the Redheugh Bridgehead, St James' Boulevard, International Centre for Life, and Newcastle College, and new business / educational uses could be considered, subject to relocating small businesses. The site has an existing planning permission for purpose built student accommodation. (5)		
Conclusions: Part of Discovery Quarter, re-allocate as mixed use area.		

TOTAL SCORE | 43

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
A1	Wing Hong Ltd	A1	Magnet Ltd
A3	Soup A Shakes	A3	The College Halal Delhi
A5	The Delhi	A5	Fish & Chips
B1	Bang On Print and Design	B1	NE Design & Print
D1	Newcastle College Commercial Services	D1	Newcastle College Applied Services
D1	ESOL Teaching and Development Centre		
SG	Halfords	SG	Avis
V	Void (x10)		

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D1	SG	Vacant
9%(2)			9%(2)		9%(2)	9%(2)		13%(3)	9%(2)	43%(10)

Ref: ED3.1 (12)	Site Name: Gosforth Industrial Estate	Area: 4.0ha
Description: Popular, low density industrial estate. Main occupier is Greggs bakery; however, this is currently being run down on this site and is advertised for let.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Good condition with majority of units being of a higher than average standard. Some units show signs of extensive refurbishment. Buildings have outside and indoor storage facilities.	Good 4
2) Levels of occupancy	Good, however the relocation of Greggs from this site could be detrimental to the industrial estate on a whole. The Greggs factory is in use but operations at the factory are being run down. Site is advertised for let. Office space on site is being advertised too. Owned by Newcastle City Council, and let on long term leases (100 years plus).	Average 3
3) Accessibility, servicing & circulation	Access is good but it is constrained by being through a residential area. Servicing and circulation are average but there are signs of road deterioration. Allocated parking facilities are not sufficient, with excessive parking on grass and roads this is detrimental to the operational efficiency of the site.	Fair 2
4) Constraining land uses	Residential to the east and west, separated by Metro lines.	Poor 1
5) Access to the strategic road network	No direct link into strategic road network, a direct route to A1 involves minor roads and then the Great North Road.	Poor 1
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	170,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	2

10) Environmental constraints	No obstacle.	3
Other considerations: Separated from any residential area by Metro lines. Electric sub station on eastern side of the site. (2)		
Redevelopment/improvement potential: Some buildings in need of some refurbishment. Potential for the site to be redeveloped in the future, however adjoining land uses prejudice non-commercial use. (2)		
Conclusions: De-allocate (3).		

TOTAL SCORE | 27

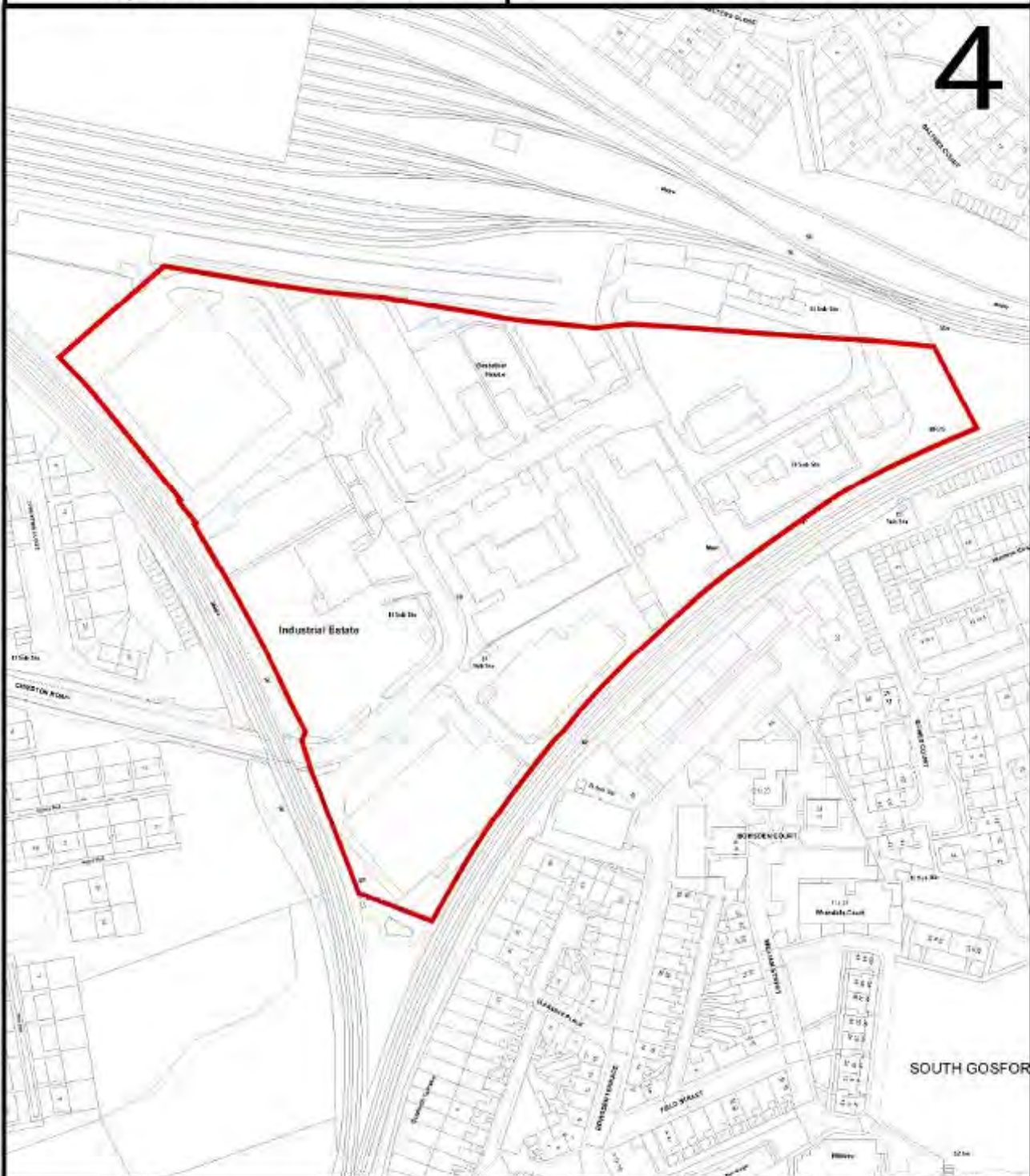
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
B1	Greggs of Gosforth	B1	Nexus Rail
B1	Continuous Retorts Limited	B1	Hagen Developments
B2	White Bros Ltd	B2	H Malone And Sons Ltd
B2	Hastie Burton Stairs		
B8	Tyneway Trading	B8	NJL Yorkline
D1	Nexus Training Centre		

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	Vacant
33%(4)	25%(3)	17%(2)				8%(1)	17%(2)

4



Address : Gosforth Industrial Estate

Area (Ha) : 4.0

Map : NZ 2568 SW

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Drawn By:
J McLaughlin

Ref: ED3.1 (13)	Site Name: Haddricks Mill Road	Area: 0.9ha
Description: Small mixed use area, limited employment use.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern development comprising of trade counter uses rather than employment. Some of the warehouse buildings show high levels of deterioration. Office block on site shows recent refurbishment. Land to the north of Majestic Wines has been cleared.	Average 3
2) Levels of occupancy	No voids.	Excellent 5
3) Accessibility, servicing & circulation	Average access, servicing and circulation arrangements with allocated parking. Site benefits from close proximity to South Gosforth Metro station.	Good 4
4) Constraining land uses	Adjacent to Jesmond Dene, and dense residential area.	Poor 1
5) Access to the strategic road network	No direct link into strategic road network. A191 is the predominant route to connect with A1.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	188,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3
10) Environmental constraints	Eastern boundary being formed by conservation area, beyond which is a designated open space site and SNCI site. Wildlife corridor also runs along the length of the site.	2
Other considerations: The site although fully occupied is not operating as the employment use it was intended to. (2)		
Redevelopment/improvement potential: The site should be de-allocated. No protection for employment uses is required. (2)		
Conclusions: De-allocate		

TOTAL SCORE	31
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
A1	Majestic Wine Warehouse	B1	TDG - Offices
B8	Jewson		

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	SG	Vacant
		33%(1)	33% (1)				33% (1)	



Address : Haddricks Mill Road

Area (Ha) : 0.9

Map : NZ 2567 NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (14)	Site Name: Hoults Yard	Area: 6.7ha
Description: 19th century industrial area, converted and updated for various SMEs, part of Ouseburn Regeneration Area.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern and refurbished SME accommodation which also has larger warehouse facilities. Predominantly office space and studios for creative media, but also has units that have outside and indoor storage facilities.	Excellent 5
2) Levels of occupancy	Occupancy level is high with only a few units void. Two older buildings outside Hoults Yard are derelict.	Good 4
3) Accessibility, servicing & circulation	Good access with ample car parking. Servicing and circulation is good. Location is close to Quayside and city centre which allows sustainable transport means and links into public transport system.	Excellent 5
4) Constraining land uses	Residential to the western boundary.	Average 3
5) Access to the strategic road network	Location is away from main motorway network but can be accessed via City Road top link into Central Motorway.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	120,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.2ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site lies within a Strategic Area if Change.	5
10) Environmental constraints	Protected open space to the west.	3
Other considerations: Popular site for creative and digital industries. (4)		
Redevelopment/improvement potential: Trading well in its current format. (4)		
Conclusions: Retain, potential to consolidate Albion Row, Hoults Yard and Riverside East into a single allocation going forward		

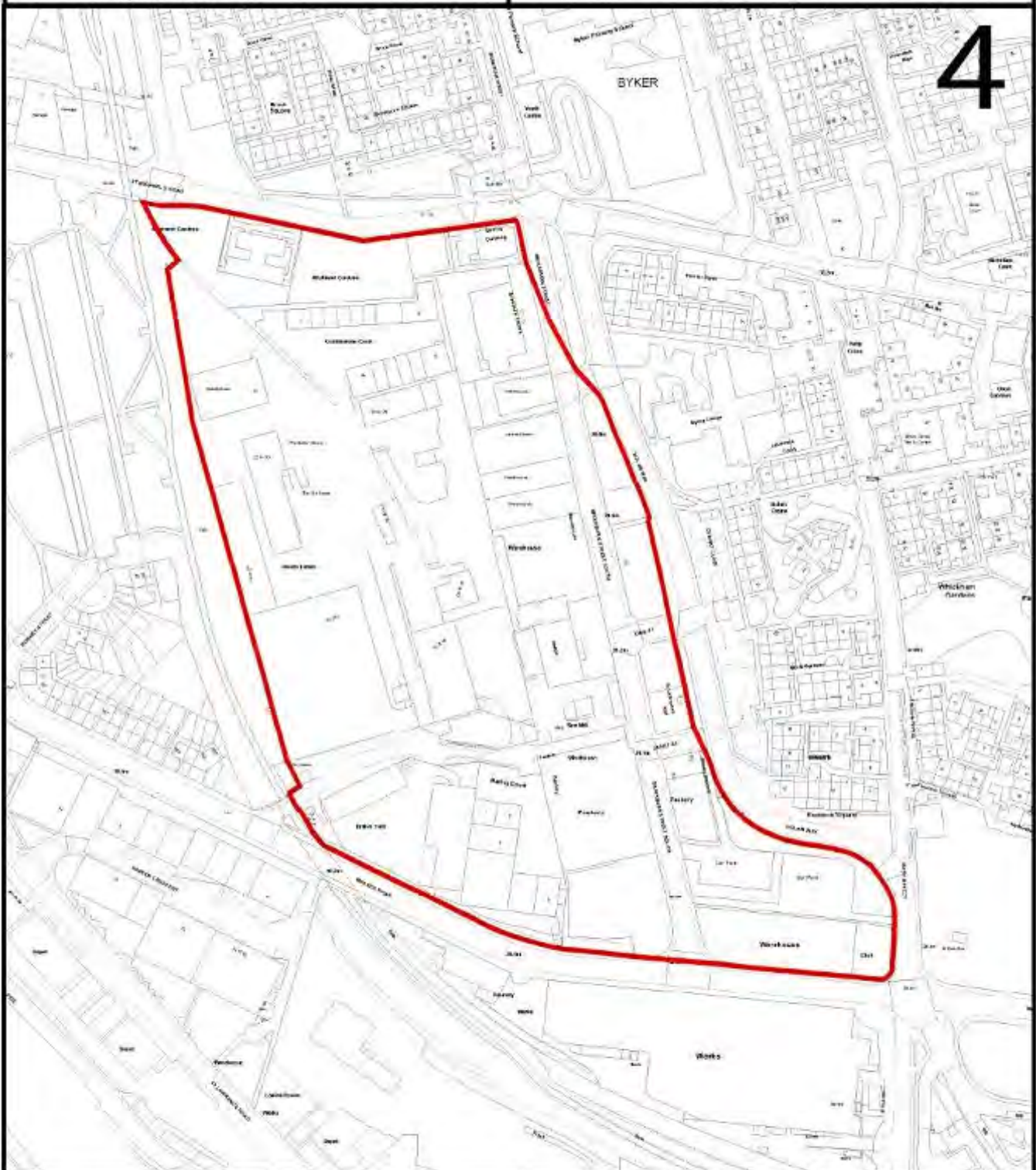
TOTAL SCORE | 50

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Nortile Ltd	A1	I D Fishing	A1	North East Ceramics
A2	Picture Canning North	A2	James Sutherland Auctioneers Ltd		
A3	Clocktower Café				
B1	Alcazar	B1	Available Light Photographic Studios	B1	Barking dog Design and Layout
B1	Big Bad Robot	B1	Bradley O'Mahoney	B1	CEL
B1	Clear Photographic	B1	City & Suburban	B1	Emotional Logic
B1	Fionda Furnishings	B1	EX – Pat Tax Consultants Ltd.	B1	Harrow Consulting LLP.
B1	Richard Zabrocki & Son	B1	Jackson Lift Group	B1	Jack Lowe Studio
B1	John Donoghue Photography	B1	L2 Business Consulting	B1	Hoult's Estate Office
B1	Mere Mortals Ltd.	B1	Mesh Digital Ltd.	B1	Mike Smith Photography Ltd.
B1	Northern Film & Media	B1	Onebestway design	B1	Picture Canning North
B1	Projected Image	B1	Projector	B1	Point Pleasant Communications
B1	Reed Ingram Weir Photography	B1	The R & B Group	B1	Real Life Options
B1	Reid Framing	B1	Select Information Systems	B1	Silverbean
B1	Sorted PR & Event Management	B1	Sole Heaven.com	B1	Standing Stone Productions
B1	Studio Cabinets	B1	The Kiln	B1	The Edge
B1	The Old Forge	B1	The Point Design Consultancy Ltd	B1	The Teapot Studios
B1	ThinkTank	B1	Union Room	B1	Warm
B1	Warehouse 34	B1	Zion Soutions.com Ltd.	B1	Zymurgy
B1	The Tony Blair Sports Foundation	B1	Urban Music Tray	B1	Dupid 9
B1	Boom Creative Consultants	B1	Violet Bick	B1	Dunn & Dusted.com
B2	Bulmer Interior Contracts Ltd	B2	BPP-Tech / BPP-Cables	B2	Collins Seafood
B2	Print Finishers Northern	B2	City Signs And Display	B2	Maling Studios
B2	Nicklins Furniture	B2	Bulmer Interiors		
B8	Montague L Meyer Ltd	B8	Lock 'N' Store	B8	Lowrie Foods Ltd
B8	The Brinkburn Group	B8	Ingram Sounds	B8	Design Event Distributions Ltd.
B8	Fly Distributions Ltd.	B8	Minster Cleaning Services	B8	MRS Storage Solutions Ltd.
B8	Gola Tyne Trading	B8	North East Ceramics	B8	City Signs
B8	Phillips Pet Supplies				
D1	St. Lawrence Gospel Hall	V	Void (x8)		

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
60%(54)	9%(8)	14%(13)	3%(3)	2%(2)	1%(1)			1%(1)		9%(8)



Address : Hoults Yard

Area (Ha) : 6.7

Map : NZ 2664 SE
NZ 2663 NE
NZ 2763 NW
NZ 2764 SW

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Drawn By:
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Ref: ED3.1 (15)	Site Name: Industry Road	Area: 5.7ha
Description: General modern employment area, a combination of modern steel portal frame units and refurbished brick built factory space.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Very good location which is close to A1058 Coast road. Buildings are a mixture of steel and brick units; some have been refurbished to a high standard. Overall site is well maintained.	Good 4
2) Levels of occupancy	Larger units are fully occupied but voids within Cloth Works Business Centre building which caters for smaller start up business. Within this there are 18 units and only 6 in use.	Average 3
3) Accessibility, servicing & circulation	Easily accessed. The layout of site is fit for purpose - providing good servicing and circulation for all vehicles. Each unit has allocated parking; some buildings have HGV facilities.	Good 4
4) Constraining land uses	Constrained by railway lines and A1058 Coast road.	Average 3
5) Access to the strategic road network	A19 can be accessed via the A1058 Coast road to the East; to the West it joins the A167(M) Central Motorway.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	146,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Strategic Area of Change.	3
10) Environmental constraints	Wildlife corridor on the eastern boundary.	3
Other considerations: Site lies on edge of Newcastle City's boundary. (3)		
Redevelopment/improvement potential: Site could be refurbished in the future to maintain standards and accordingly popularity. (3)		
Conclusions: Retain		

TOTAL SCORE	39
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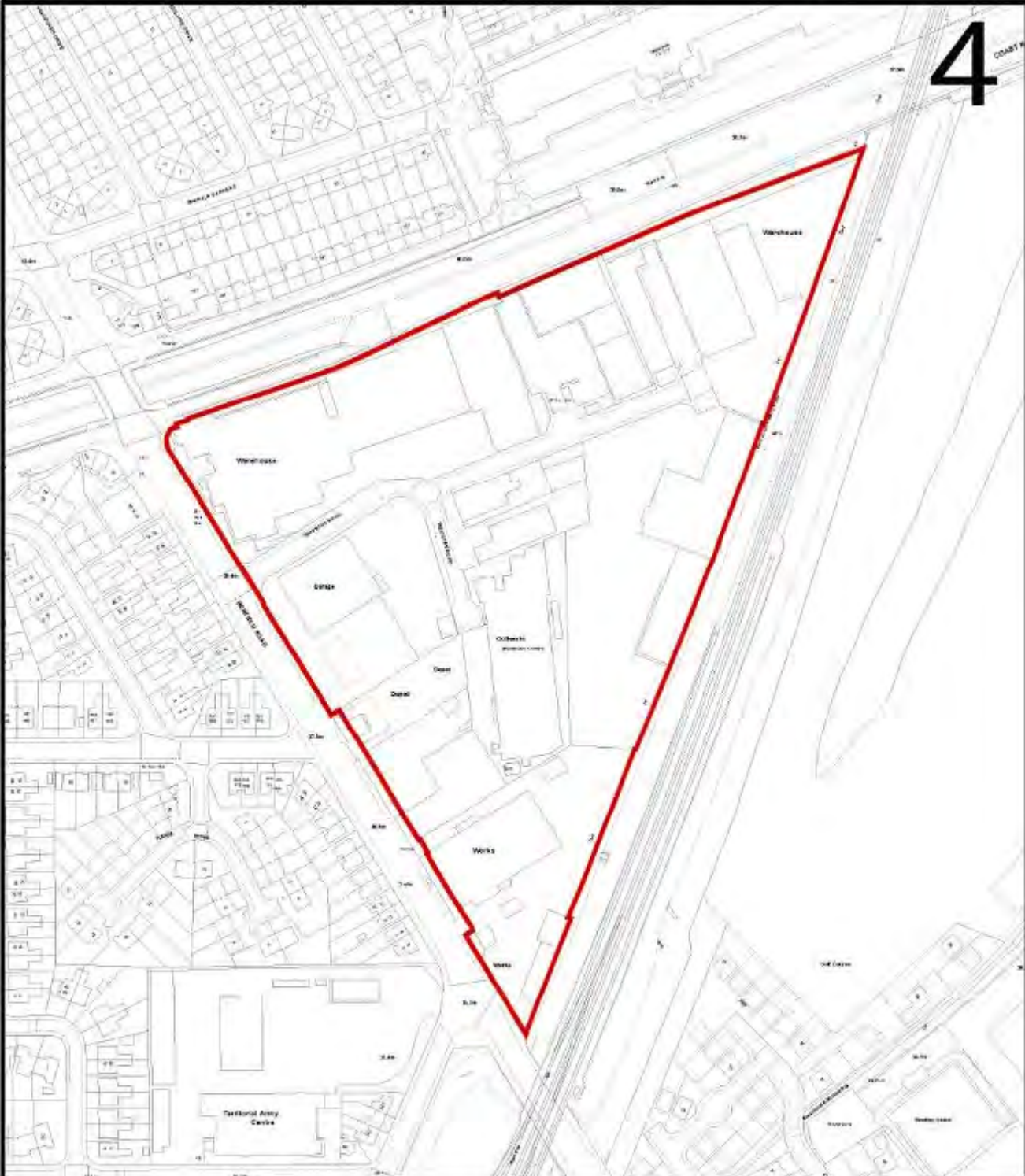
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Right Choice for Beds	A1	Franks Factory Flooring	A1	Topps Tiles
B1	Sense	B1	Hepple Engineering	B1	Positive Life Choices
B1	The Head of Steam Ltd.	B1	3mo Prints	B1	Josie Brooks
B2	The T140 Shop	B2	Stuart Wailing		
B8	Sicambe Electrical Distribution	B8	Newey & Eyre Ltd	B8	Northern Tools And Accessories Ltd
B8	1 st Storage Centres	B8	A G Barr Plc	B8	Crossling (4 units)
B8	Parker Express	B8	C.M. Wholesale and Distribution Ltd.		
SG	Benfield Renault				
V	Void (x12)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
19%(6)	6%(2)	25%(8)	9%(3)						3%(1)	38%(12)

4



Address : Industry Road

Area (Ha) : 5.7

Map : NZ 2766 NE
NZ 2866 NW/SW

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Drawn By:
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Ref: ED3.1 (16)	Site Name: Mill Lane Industrial Estate/Lynwood Development Centre	Area: 1.4ha
Description: Low cost workshop and office units to people starting up business. 100 – 2,000 sq.ft.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Design and layout of site is very dated but buildings look well maintained.	Good 4
2) Levels of occupancy	No visible voids. Managed by Newcastle City Council, Property Services. No vacancies at Mill Lane or Lynwood. Good parking facilities and Lynwood has waiting and reception facilities.	Excellent 5
3) Accessibility, servicing & circulation	Access to estate is poor as it is through residential streets. Servicing and circulation good due to wide parking facilities and roads on estate. Location of estate is close to residential and sustainable transport links such as bus and cycle ways.	Good 4
4) Constraining land uses	Located in residential area with allocated allotment gardens adjacent to the south.	Fair 2
5) Access to the strategic road network	Via Westgate Road which links to A1 and city centre.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	141,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	2
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	3
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5
10) Environmental constraints	Allocated allotment gardens adjacent to the south.	3
Other considerations: Popular and affordable units in an accessible location. (4)		
Redevelopment/improvement potential: Site is beginning to show signs of wear and tear. (4)		
Conclusions: Retain		

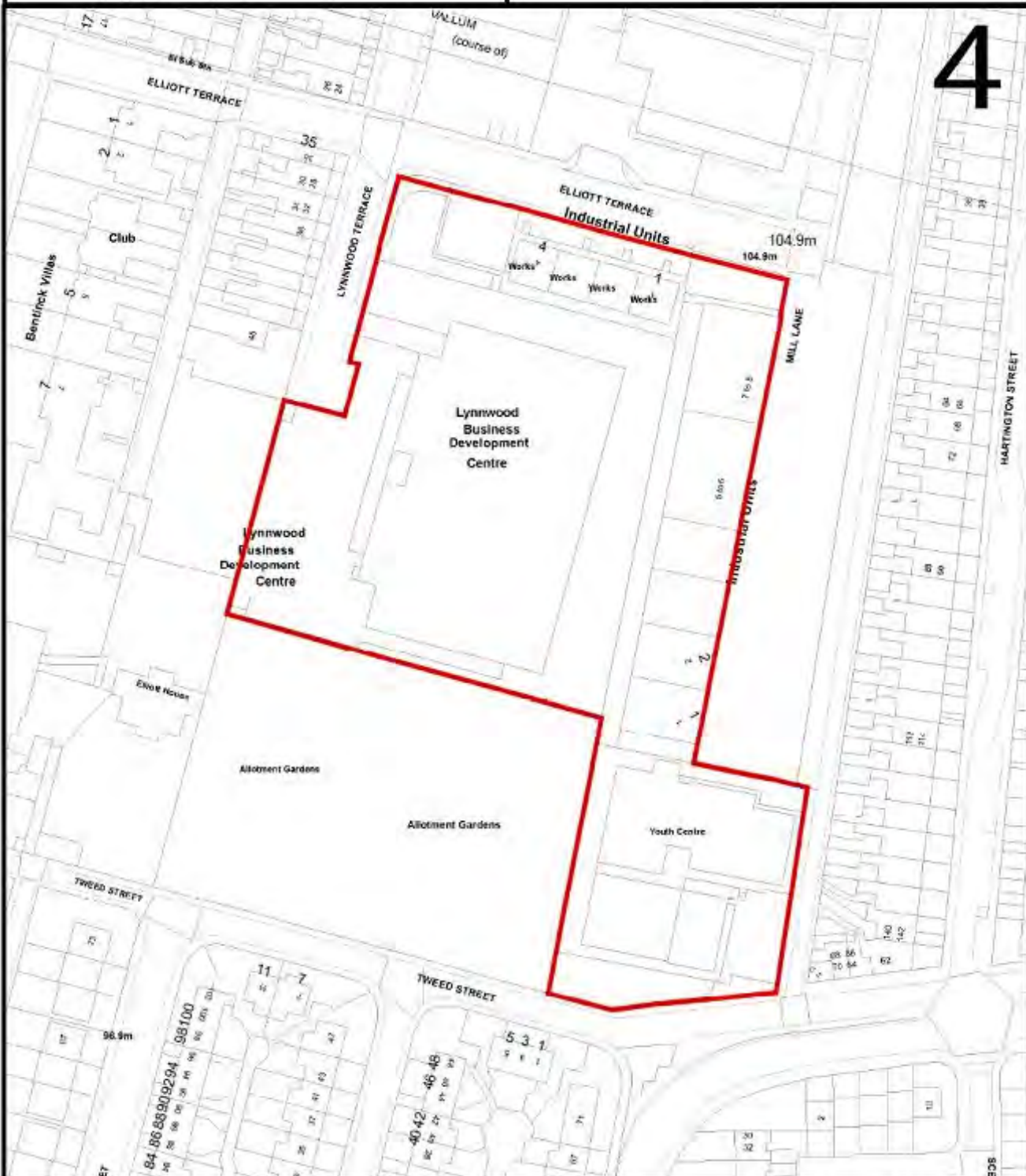
TOTAL SCORE	44
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A5	Curry Express				
B1	Newcastle City Council - Lynnwood Business Development Centre	B1	APM Cleaning Ltd.	B1	Challenge Courier Company
B1	The Children's Society	B1	City Sprint	B1	Foundry Media
B1	Media Service Solutions	B1	Mulligan Dufrane – sports mag	B1	N- Gage Personal Safety Training
B1	North East Fire Safety Services	B1	Out of School / Hedghog	B1	Paul Leighton Joinery
B1	Someone Cares Ltd	B1	Stonham	B1	Walters Building and Joinery
B1	Alan Wilson Solicitor	B1	ATC Electricals (NE) Ltd		
B2	Rehman Sweet Centre	B2	Furniture Warehouse	B2	CT Training
B8	Eats Vans	B8	Metal Craft		
B8	City Glass & Glazing	B8	Spicy Solutions	B8	Supply Direct
D1	Community IT Academy	D1	RNR Solutions		
D2	Newcastle City Council – Mill Lane Youth Centre				
SG	Auto Repair Centre				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D1	D2	SG	Vacant
57%(17)	10%(3)	17%(5)				3%(1)		7%(2)	3%(1)	3%(1)	(0)



Address : Mill Lane Industrial Estate /
Lynwood Development Centre

Area (Ha) : 1.4

Map : NZ 2264 SE
NZ 2364 SW

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Drawn By:
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Ref: ED3.1 (17)	Site Name: New Bridge Street	Area: 5.5ha
Description: Mixed use area, adjoining the City Centre. Limited employment use content.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Industrial units are in a reasonable condition – some showing signs of deterioration while others have had a recent refurbishment. Area has a mixture of uses including residential and has had a recent student accommodation block built upon it.	Average 3
2) Levels of occupancy	Vacancy rate is lower than average due to change of use to student accommodation. Identified voids primarily located on the A193 New Bridge Street. 6 voids in total.	Fair 2
3) Accessibility, servicing & circulation	Reasonable access, servicing and circulation – parking allocation in area is very poor and access roads within site are narrow which could affect larger vehicles and the operational efficiency of the site.	Fair 2
4) Constraining land uses	Christ Church C of E & Primary School on Simpson Terrace is a Grade II* listed building. Residential area to the northern site boundary and to the south is student accommodation.	Poor 1
5) Access to the strategic road network	Good access to Central Motorway via A193.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	200,000 + economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5).
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Strategic Area of Change.	3
10) Environmental constraints	Site of archaeological interest runs across north east of site.	3
Other considerations: Site lies adjacent to ED3.1 (30). (3)		

Redevelopment/improvement potential: New student accommodation under construction on part of site. Remainder of site should be brought forward in a comprehensive manner as outlined in the UCAAP. (1)

Conclusions:

Piecemeal area (business, distribution, retailing and warehousing). De-allocate

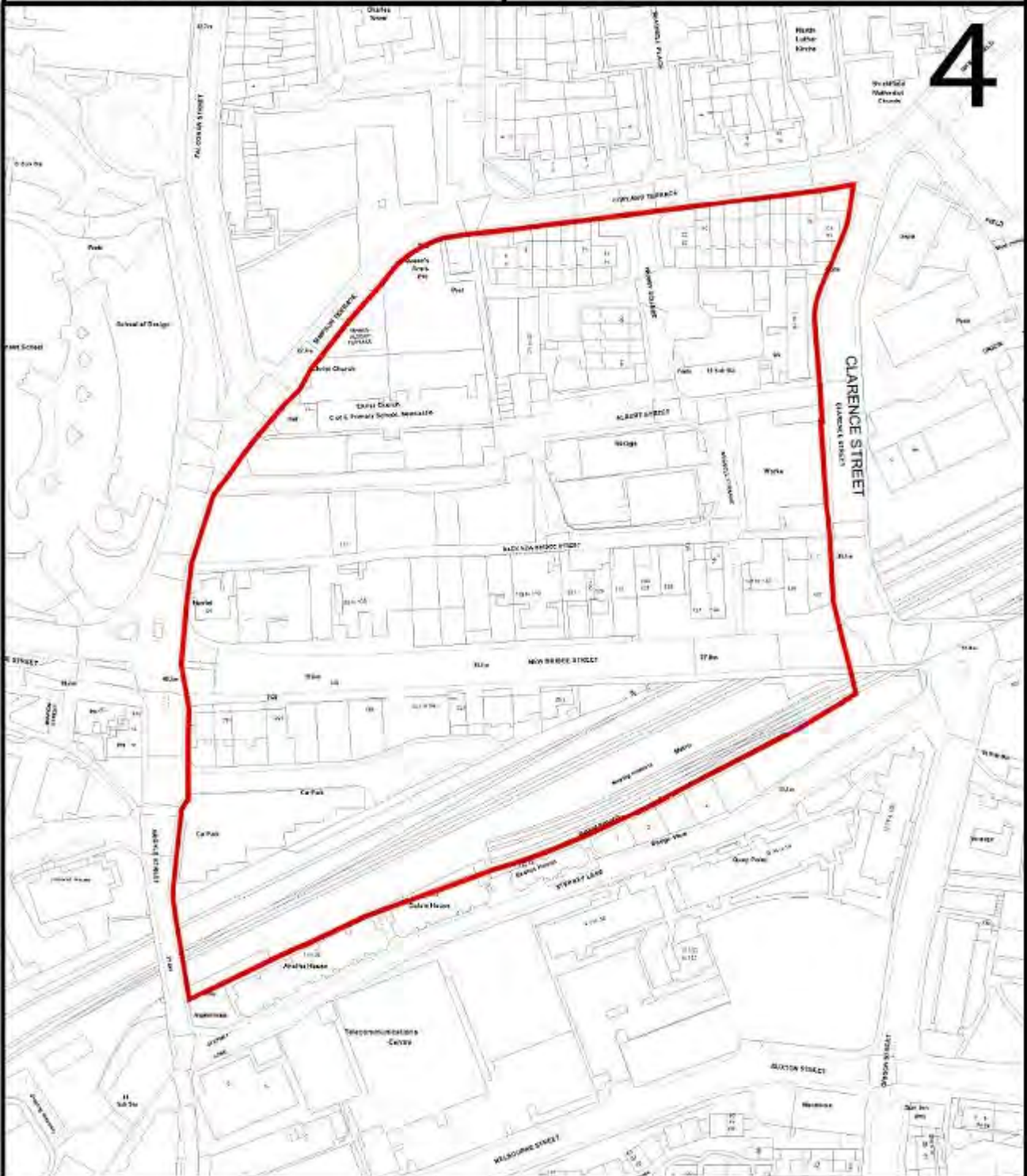
TOTAL SCORE 33

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Sainsbury Local	A1	Cheviot Printers	A1	Max Fixings
A1	The Kiddie Store	A1	Mattress Shop	A1	Complete Bathroom Company
A2	Jark Recruitment	A2	P – Corporate Letting Specialists		
A4	Queens Arms				
A5	Tasty Land – Chinese Take Away				
B1	Yellow Brick House	B1	AirCare	B1	All Media
B1	Aircare	B1	Beaumont Colson Ltd	B1	G T Contracts Ltd
B1	GT Contracts Ltd.	B1	Brewster & Brown Accountants		
D1	Newcastle City Council - Christ Church CE Primary School	D1	Christ Church	D1	Northumbria Student Accommodation
SG	Formula One				
V	Void (x6)				

Use Class Proportions

B1	B2	B8	A1	A2	A4	A5	C3	D1	SG	Vacant
28%(8)			21%(6)	7%(2)	4%(1)	4%(1)		11%(3)	4%(1)	21%(6)



Address : New Bridge Street

Area (Ha) : 5.5

Map : NZ 2564

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Drawn By:
J McLaughlin

Ref: ED3.1 (18)	Site Name: Newburn Haugh Industrial Estate	Area: 13.2ha
Description: Single storey steel frame units with brick infill cavity walls.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Good condition with sites showing a high level of maintenance - apart from 2 showing signs of decay and poor maintenance.	Good 4
2) Levels of occupancy	Estate currently has 8 visible voids on the site that are being marketed – predominantly smaller units available on the estate.	Fair 2
3) Accessibility, servicing & circulation	Good access, servicing and circulation. Ample supply of parking and large roads easy for access by HGVs.	Good 4
4) Constraining land uses	Concrete plant beyond southern boundary. Designated open space and SNIC to the western boundary.	Poor 1
5) Access to the strategic road network	Access via Riversdale Way. However, this estate is far from the city centre and main roads.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	70,000 + economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade C (3)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area	2
10) Environmental constraints	Designated open space and an SLCI to the western boundary with a wildlife corridor running through it. An area of archaeological interest and a Grade II* listed building exist on the site.	1
Other considerations: Affordable accommodation. (2)		

Redevelopment/improvement potential: Potential to redefine and consolidate Newburn Haugh Industrial Estate and Newburn Industrial Estate. This site should be redeveloped in a comprehensive manner to provide an interface between Newburn Haugh and Lemington village. Lemington Caravan Park, Riverside Way have been assessed as part of the Council's Waste Site Appraisal and could be an appropriate locations for waste management facilities. (3).

Conclusions:
De-allocate

TOTAL SCORE 28

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Dove Building Materials	A1	Prime Security Ltd		
A5	Speedy Pepper				
B1	Equine Products UK Ltd	B1	Wesew 4U	B1	Natural Stockcare Ltd
B2	Aluminium can collection Centre	B2	Classic Coachcraft	B2	Anderson Print Finishes
B2	Northern Hardfacing Company	B2	ADW Interiors Ltd.	B2	Jane Charles Studio Glass
B8	Diamond Dispatch	B8	G T Hydraulics	B8	Premier Press
B8	Benson Group	B8	MGL Group Ltd.	B8	
SG	Brambles Van Rental Ltd.				
V	Voids				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D1	SG	Vacant
12%(3)	23%(6)	19%(5)	8%(2)			4%(1)			4%(1)	30%(8)



Address : Newburn Haugh Industrial Estate

Area (Ha) : 13.2

Map : NZ 1864
NZ 1764 NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (19)	Site Name: Newburn Industrial Estate	Area: 17.8ha
Description: Modern, light industrial and storage accommodation with basic office facilities.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Mixture of units, with some sites having extensive outside storage and manufacturing facilities combined with offices. Some modern units consisting of single and double storey units.	Good 4
2) Levels of occupancy	Owned by Newcastle City Council and let on long term leases (100 years plus). One void being marketed through Knight Frank.	Good 4
3) Accessibility, servicing & circulation	Good access, servicing and circulation arrangements. Majority of units have allocated parking but some road parking taking place. Site can easily be accessed by larger vehicles.	Good 4
4) Constraining land uses	River to the southern boundary,	Average 3
5) Access to the strategic road network	Remote location, access to the city centre via Newburn Road.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	60,000 + economically active people within 30 minutes of site by public transport.	Poor: Accessibility Grade D (2)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	Good 5
8) Jobs/workforce ratio	0.3 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	Below Average 2
9) Regeneration policy	The site does not lie within a Regeneration Growth Area.	3
10) Environmental constraints	Wildlife corridor.	3
Other considerations: Good mix of units, likely to remain popular over the plan period due to proximity to Newburn Riverside. (4)		
Redevelopment/improvement potential: Part of the Lemington Development Corridor. (3)		
Conclusions: Retain(3).		

TOTAL SCORE | 39

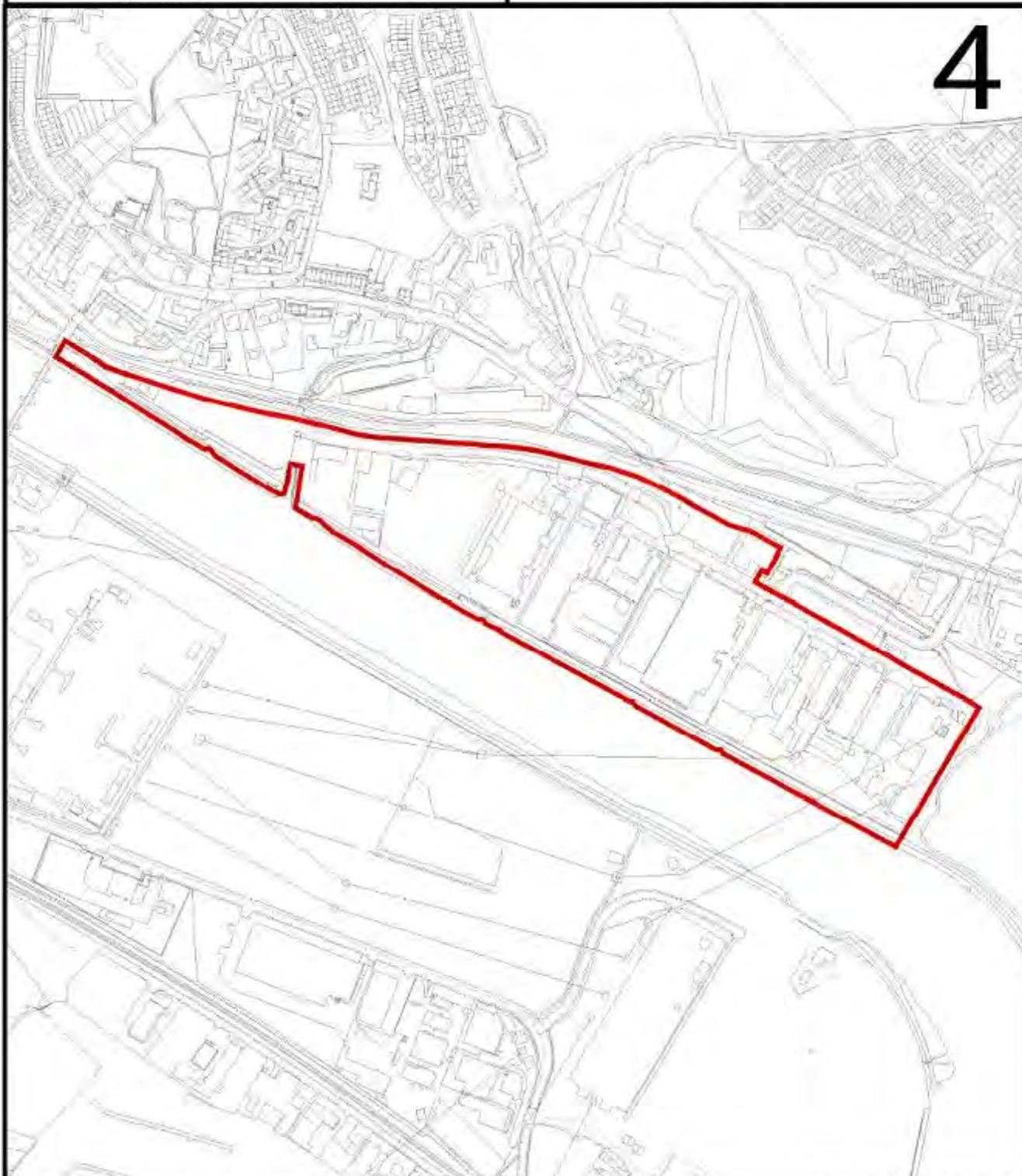
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A3	Breakfast at Tiffany's				
B1	SWPhotography				
B2	Metal Spinners Group Ltd	B2	Amerex Steel Centre	B2	Warburtons (Tyne & Wear) Ltd
B2	JMW Aluminium Ltd.	B2	Millfield Enterprises Ltd	B2	Millfield Group Ltd
B2	Scott JCB Ltd.	B2	Warmseal Windows	B2	M.B. Precision Engineering (North East) Ltd.
B2	Ross's	B2	Laser Ex	B2	IEF Fabrications
B2	Out of Town Party Warehouse				
B8	M & S Distributors Ltd	B8	S.W.E.L – specialist welding and engineering Ltd.		
SG	Norman Marshall Ltd				
V	Void (1)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
5%(1)	68%(13)	11%(2)			5%(1)				5%(1)	5%(1)

4



Address : Newburn Industrial Estate

Area (Ha) : 17.8

**Map : NZ 1764 NE/NW
NZ 1765 SW
NZ 1664 NE
NZ 1665 SE**

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**Drawn By:
J McLaughlin**

Ref: ED3.1 (20)	Site Name: Newburn High Street & Walbottle Road	Area: 4.0ha
Description: Remaining part of larger 19th century industrial area.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Area has an array of buildings which include modern business units, refurbished buildings for office purposes and larger, older warehouses. The Owners Business Centre and Walker Davison House have 84% occupancy providing office space for many businesses – these two sites share a reception and facilities. One office block on the north part of the site is completely vacant. Some older buildings on the south side look in poor condition even though still in use.	Good 4
2) Levels of occupancy	10 voids within business centres and 1 building. Scale of site must be considered.	Good 4
3) Accessibility, servicing & circulation	Access into sites is good and well maintained but allocated car parking does not seem to meet demand. Servicing and circulation good.	Average 3
4) Constraining land uses	Close to Millvale housing development to the north. Adjacent to Sandhills recycling centre.	Fair 2
5) Access to the strategic road network	Via Lemington Road, but remote from City Centre and strategic road network.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	60,000 + economically active people within 30 minutes of site by public transport.	Poor: Accessibility Grade D (2)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	2
10) Environmental constraints	Area of archaeological interest to the west of site.	2
Other considerations: Site provides affordable accommodation. (2)		

Redevelopment/improvement potential: North side of High Street appears to be trading relatively well. South side, Owners Business Centre and Walker Davison House is providing office space for small business and seems to be working well. The run down appearance of the scrap yard detracts the visual appearance of the area. Boundary of the allocation should be redefined and the area to the south of the High Street should be deleted. (2)

Conclusions:

De-allocate. The site should be brought forward in a comprehensive manner to provide a gateway to Newburn.

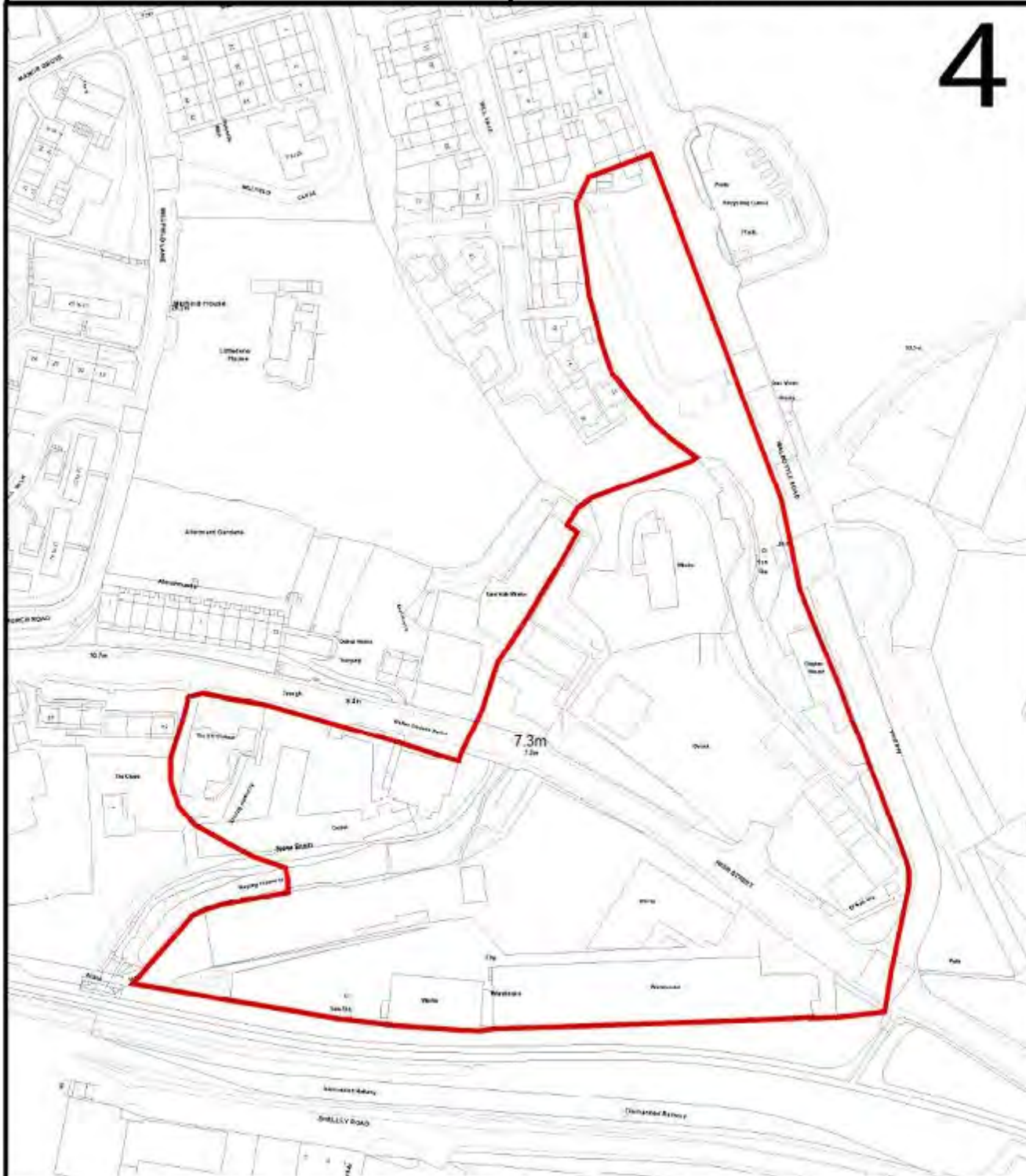
TOTAL SCORE | 32

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	K B Cycles	A1	Brides By Lucia Lee	A1	Walbottle Tyre Services
A2	Derwent Financial Management	A5	Tandoori Kitchen		
B1	Advantage Utilities Services Ltd.	B1	Apex Brickwork Ltd.	B1	Arrowflex International
B1	Building Surveyors	B1	Brove IT Services	B1	Direct Submit
B1	Electromode (Tyne and Wear)	B1	Exactal Europe Ltd	B1	Foxy Hair Extensions
B1	Paul Glenholm and Co Ltd.	B1	Global Draw	B1	Kidz Get Fit
B1	Laraco Construction Ltd	B1	F.W. Latimer	B1	Geoff Maclauchan Ltd.
B1	Metro Freight Services	B1	NMT International Shipping	B1	Normis Systems Limited
B1	North East Connections	B1	Oakhill Partnership	B1	Property Search
B1	Richards & Co	B1	B.J. Roberts Ltd.	B1	Technology Transition Corporation Limited
B1	The Ashworth Collection	B1	Timestar Developments Ltd.	B1	Toby Resources Ltd.
B1	Top Left Concepts Ltd.	B1	Utiligensia	B1	UPM Tilhill Office 47
B1	Vision for Education	B1	Wolf Consultancy	B1	P and J Properties
B1	Yellow Tiger Design And Marketing Ltd	B1	H.M.E	B1	NDTS Electrical Contractors
B1	Group Horizon				
B2	Northern Elevators	B2	Presmac Ltd.		
B8	MJM Fabrications	B8	Hayden Engineering Limited	B8	Just Brickwork
D1	Newburn Dental Surgery				
SG	UK Commercial Vehicles	SG	ACE Garage	SG	H.Pringle Vehicle Dismantlers
V	Void (11)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D1	SG	Vacant
60%(37)	3%(2)	5%(3)	5%(3)	2%(1)		2%(1)		2%(1)	5%(3)	18%(11)



Address : Newburn High Street /
Walbotte Road

Area (Ha) : 4.0

Map : NZ 1665 SE
NZ 1765 SW

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Drawn By:
J McLaughlin

Ref: ED3.1 (21)	Site Name: Newcastle Brewery	Area: 10.9ha
Description: Older industrial area, surplus property following recent investment and rationalisation of production. Site has now been cleared, and development commenced. Development is primarily education and residential.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Barrack Road houses Newcastle University buildings and apartment blocks along with the Sandman Signature Hotel. The two remaining sites are being used by Newcastle University for scientific research.	5
2) Levels of occupancy	The Newcastle University buildings are fully occupied and the hotel is fully operational. The two apartment blocks on site are not yet finished.	5
3) Accessibility, servicing & circulation	The site has been developed with the end user in mind. Specifically, access roads have been created, along with walkways for pedestrians.	5
4) Constraining land uses	There is a significant amount of cleared land remaining on site that is currently being used by Newcastle University for research.	5
5) Access to the strategic road network	City centre location allows access into the strategic road network.	5
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	200,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5).
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	Good (5)
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	Below Average (2)
9) Regeneration policy	Part of Science City and 1Plan.	3
10) Environmental constraints	No overriding constraints.	3
Other considerations: B1 forms part of the Masterplan, but the site is not intended to be developed out for employment use in its entirety.(3)		

4



Address : Newcastle Brewery

Area (Ha) : 10.9

Map : NZ 2364 SE
NZ 2464 SW

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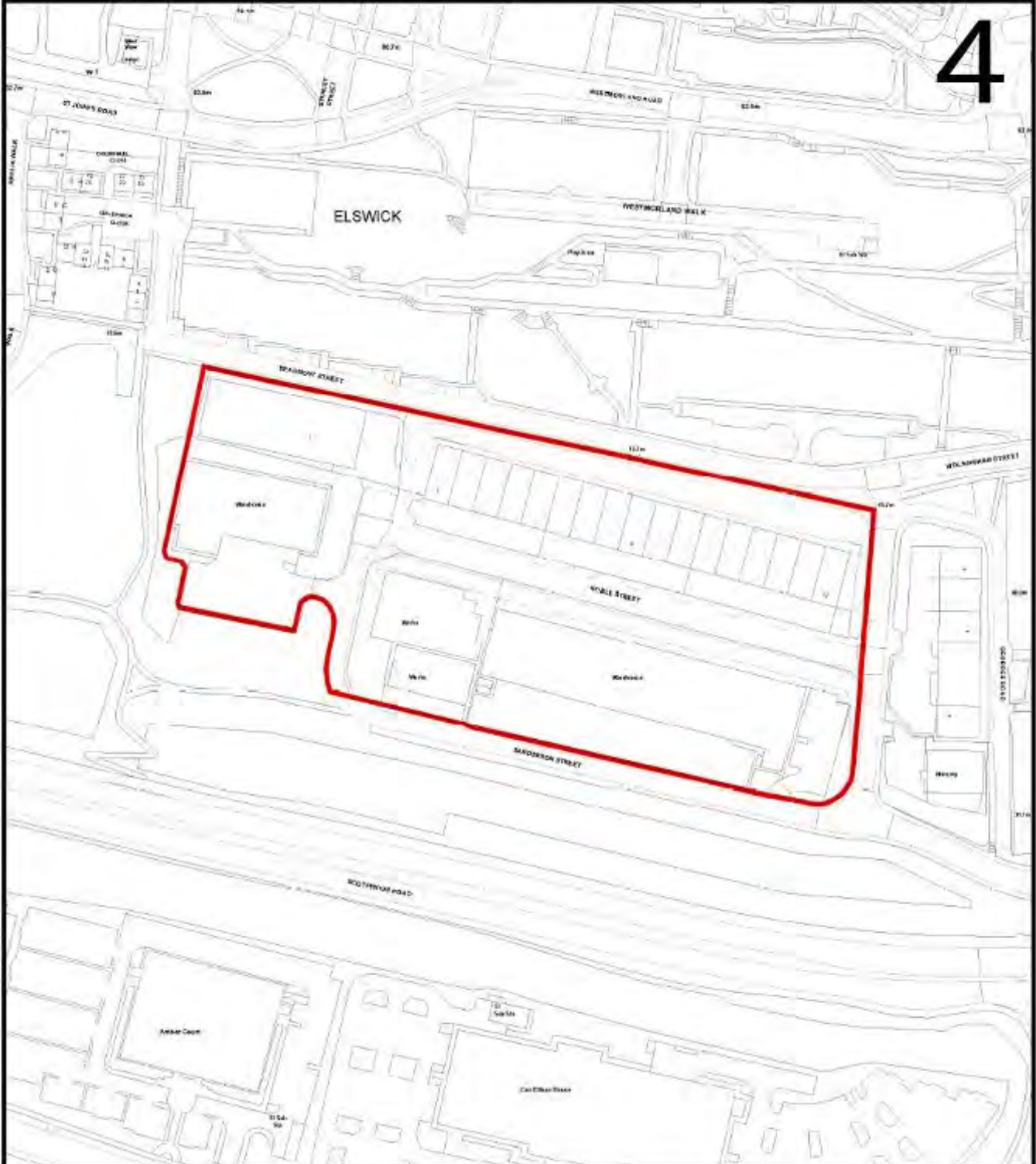
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Drawn By:
J McLaughlin

Ref: ED3.1 (22)	Site Name: Noble Street	Area: 3.4ha
Description: Modern warehouse/workshop with office accommodation. Excellent proximity to Newcastle City Centre.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Good, larger units to the front of the site with smaller units to the rear.	Good 4
2) Levels of occupancy	Two units void.	Average 3
3) Accessibility, servicing & circulation	Good access, servicing and circulation. Extensive car parking and loading capabilities. Close proximity to other industrial estates. A detraction on this estate is that the service roads show deterioration which may hinder operational efficiency.	Average 3
4) Constraining land uses	Allocated open space borders the west, south and north of the site. The north site has a perimeter fence in place and road foundations. Some open space to the east mixed in with sporadic buildings. Potential for expansion.	Excellent 5
5) Access to the strategic road network	Good access onto Scotswood Road which links to the A1 and city centre.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	146,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	3
8) Jobs/workforce ratio	0.3 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5



Address : Noble Street Industrial Estate

Area (Ha) : 3.2

Map : NZ 2263 SE

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Drawn By:
J McLaughlin

Ref: ED3.1 (23)	Site Name: Pooley Road and Slatyford Lane	Area: 5.0ha
Description: Developed as a retail park and bus depot.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	N/A	N/A
2) Levels of occupancy	N/A	N/A
3) Accessibility, servicing & circulation	N/A	N/A
4) Constraining land uses	N/A	N/A
5) Access to the strategic road network	N/A	N/A
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	N/A	N/A
7) Social development	N/A	N/A
8) Jobs/workforce ratio	N/A	N/A
9) Regeneration policy	N/A	N/A
10) Environmental constraints	N/A	N/A
Other considerations: N/A		
Redevelopment/improvement potential: N/A		
Conclusions: De-allocate.		

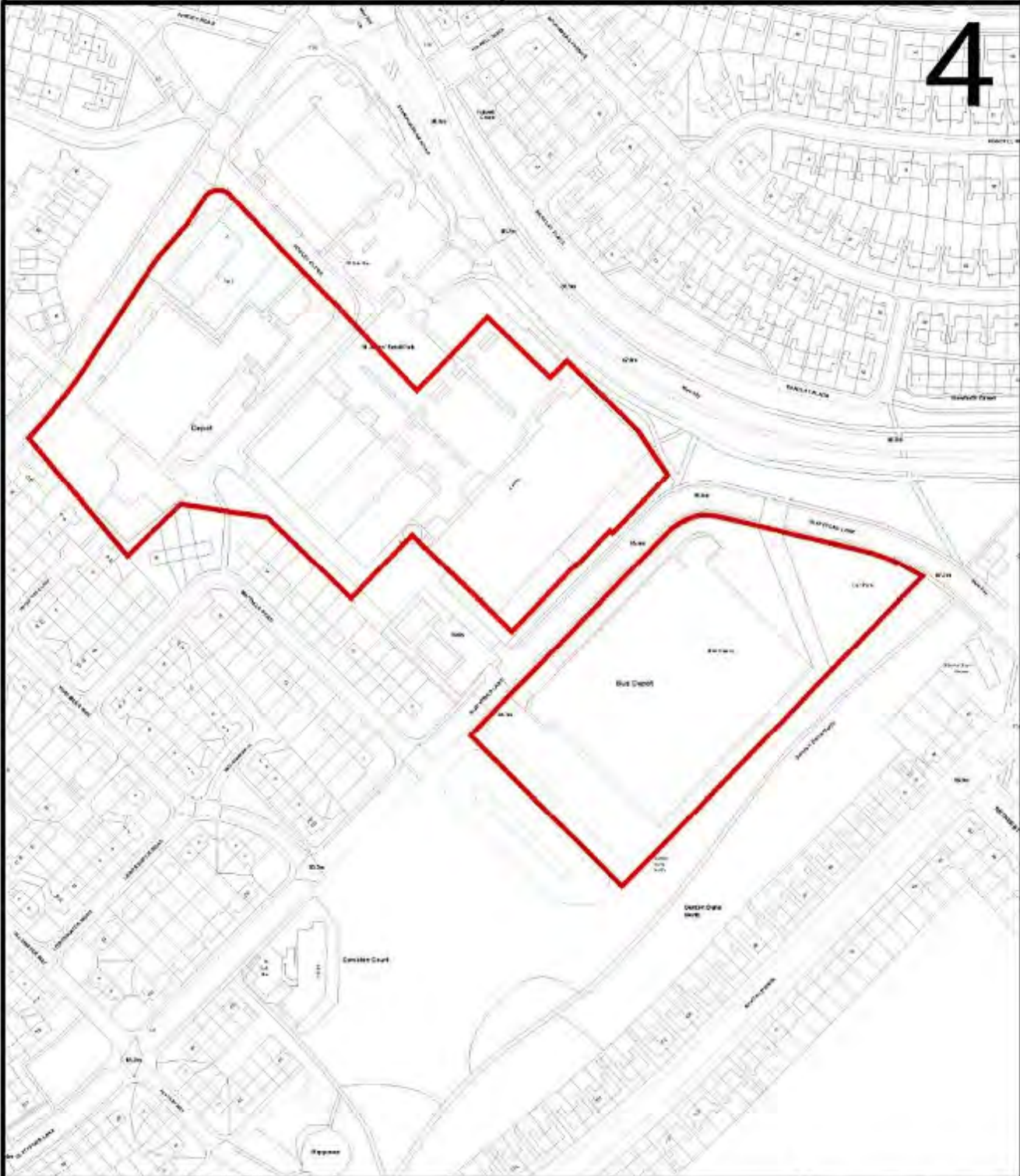
TOTAL SCORE | N/A

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
A1	Wickes Extra	A1	Vacant Retail Unit
A1	Franks Retail Unit	A1	Vacant Retail Unit
A1	Collectables Retail Unit	SG	Stagecoach Busways

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	SG	Vacant
			83.33%(5)				16.67%(1)	



Address : Pooley Road / Slatyford Lane

Area (Ha) : 5.0

Map : NZ 2066 SE
NZ 2166 SW

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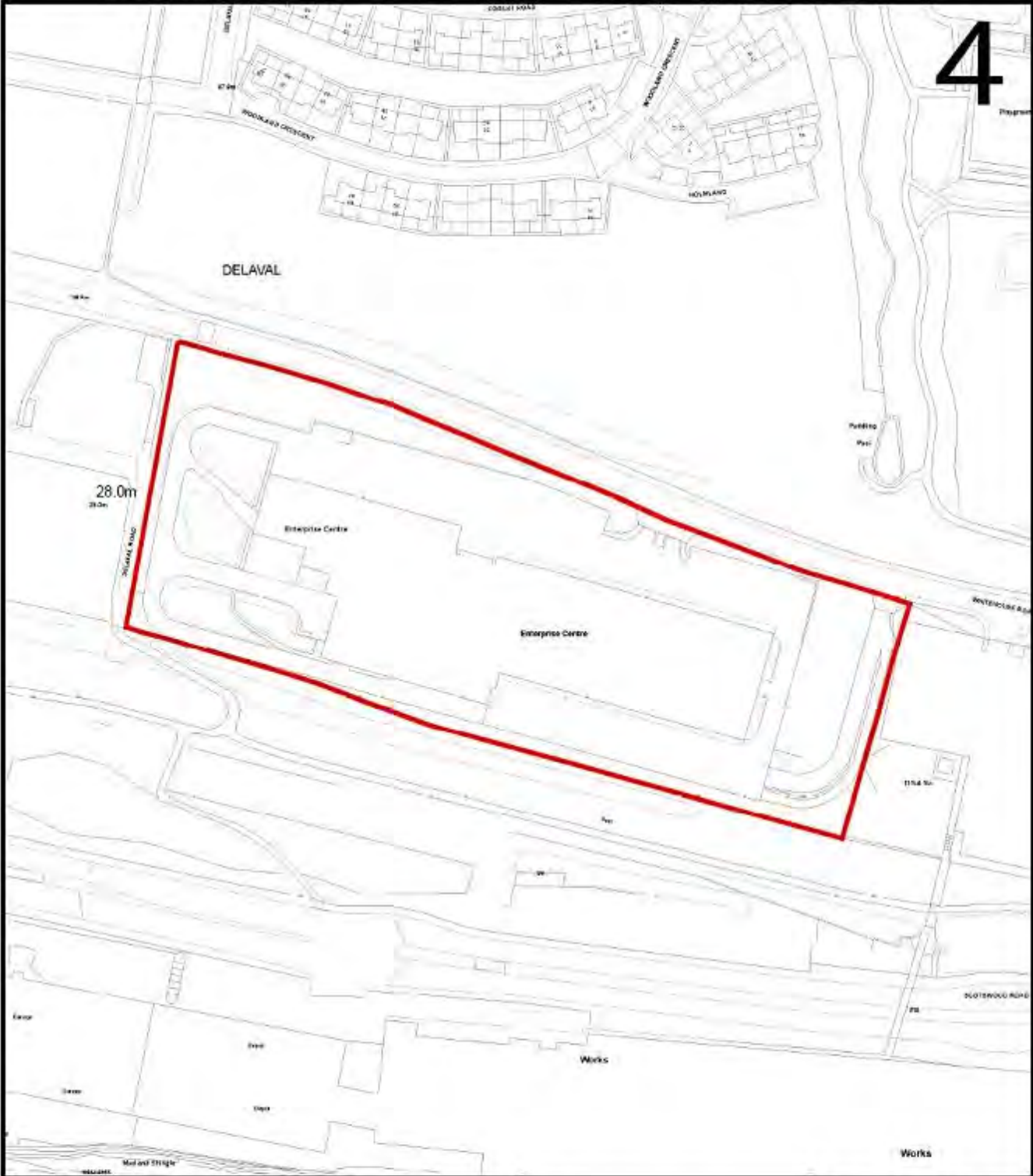
Drawn By:
J McLaughlin

Ref: ED3.1 (24)	Site Name: Premier Development Centre, Whitehouse Road	Area: 2.7ha
Description: The Premier Development Centre and the Whitehouse Road Enterprise Centre are both within the same building. The Premier Development Centre is managed whereas the Enterprise Centre is privately let units.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Good in parts, dilapidated in parts.	Average overall: 3
2) Levels of occupancy	Property Services are in the process of decanting all tenants from the Whitehouse Enterprise Centre (which includes the Premier Development Centre) with a view to transferring the entire site to development partner, Priority Sites, who will demolish the existing building and then build out circa. 135,000 sq ft of commercial space.	0
3) Accessibility, servicing & circulation	Reasonable access, servicing and circulation.	3
4) Constraining land uses	Overlooked by housing.	3
5) Access to the strategic road network	Good access to Armstrong / Scotswood Road.	4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	122,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.3 ratio of claimants against working age population, indicating that there is a balance / imbalance of jobs and economically active in the area.	3
9) Regeneration policy	The site lies within a Regeneration Growth Area.	5
10) Environmental constraints	Surrounded by protected open space. Wildlife corridor to the southern boundary.	3
Other considerations: See Loadman Street (1515) (3)		
Redevelopment/improvement potential: Site due to be redeveloped by Priority Sites who will demolish the existing building and then build out circa. 135,000 sqft of commercial space.(4)		
Conclusions: Retain The demolition of the former Whitehouse Enterprise Centre is now complete. The cleared site now forms part of the emerging employment portfolio.		

TOTAL SCORE	41
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(Scoring: 5 = best, 1 = worst)

4



Address : Premier Development Centre,
Whitehouse Road

Area (Ha) : 2.7

Map : NZ 2063 NE
NZ 2163 NW

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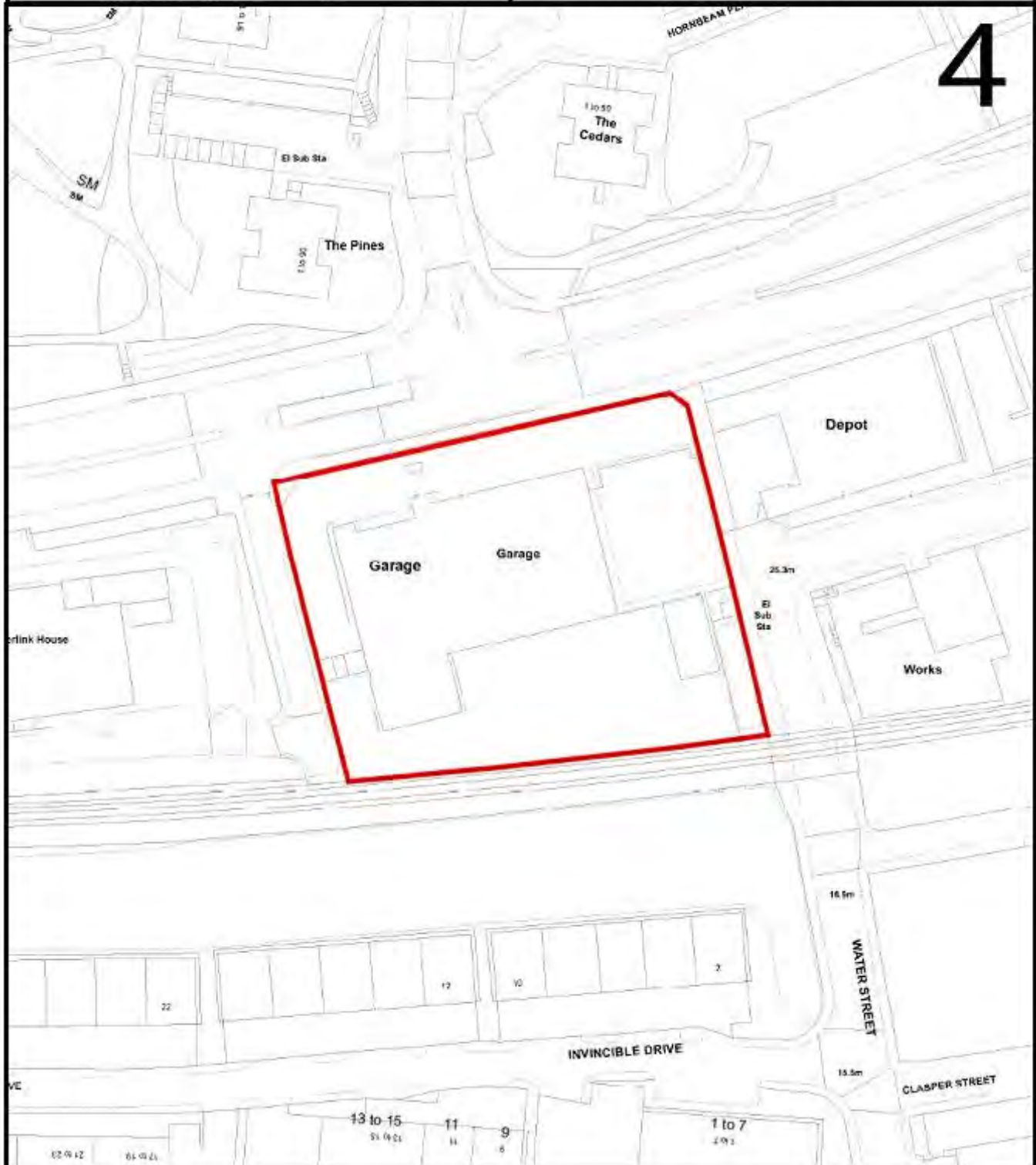
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Drawn By:
J McLaughlin



4



Address : Prospect / Tynos Works

Area (Ha) : 3.6

Map : NZ 2363 SW/SE

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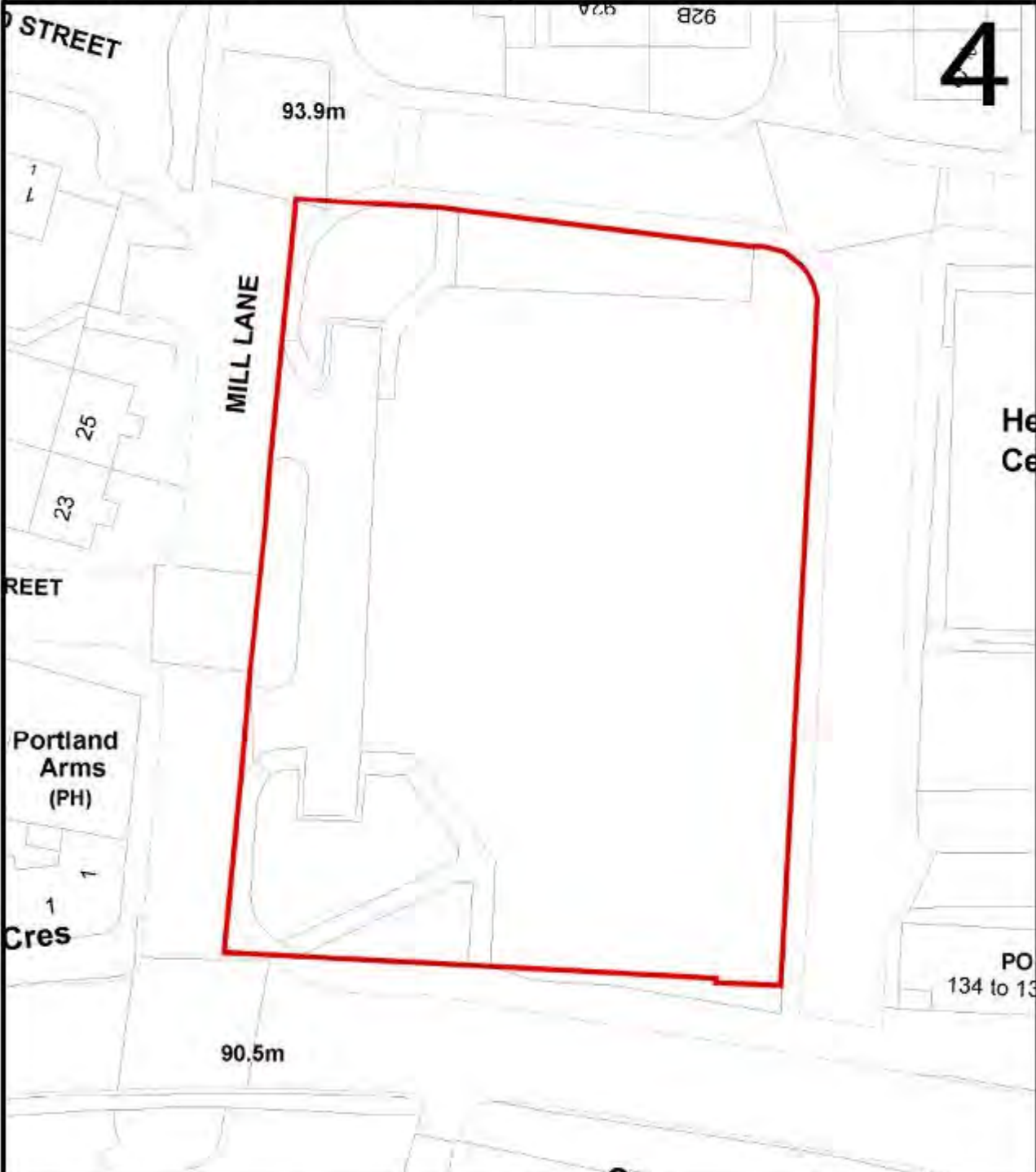
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Drawn By:
J McLaughlin

4



Address : Mill Lane South (former Rainbow Workshop)	Area (Ha) : 0.5	Map : NZ 2363 NW
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Ref: ED3.1 (27)	Site Name: Riverside East	Area: 21.2ha
Description: Remaining part of 19th century industrial area. Site includes Byker Waste Transfer site and Hawick Crescent Industrial Estate.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Majority of site is occupied by Bel Valves. Well maintained area but buildings in no use/occupancy are in a very poor condition. Residential apartment blocks have been built within the allocated site. St Lawrence Road has small to medium modern warehouses that look void but have no visible marketing. Hawick Trading Estate has been recently refurbished and is being actively advertised by GVA. Majority of units have access to indoor and outdoor storage facilities.	Good 4
2) Levels of occupancy	High number of voids recorded (11) primarily in the small to medium sized units.	Average 3
3) Accessibility, servicing & circulation	Access, servicing and circulation are average. The estate is serviced by narrow and haphazard roads that could cause issue with larger vehicles. Majority of sites have allocated parking but there was considerable on street parking. Close proximity to Quayside and city centre.	Average 3
4) Constraining land uses	River to the southern boundary and extensive allotment site to East.	Average 3
5) Access to the strategic road network	Site is far from strategic road network and access to A19 is via A186 Walker Road.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	96,000+ economically active people within 30 minutes of site by public transport.	Above Average: Accessibility Grade B (4)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.1/ 0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5

10) Environmental constraints	Wildlife corridor abuts the western country.	3
Other considerations: Site levels render part of the site unsuitable. Contamination anticipated. (3)		
Redevelopment/improvement potential: Approved local strategy to retain essential existing, and secure new business accommodation in association with development for a mix of uses. Site includes Spillers Mill (4285) and Spillers Quay (1035) being brought forward by 1NG under Phase 1 of the 'Ouseburn and East Quayside Development Framework'. (4) Byker Transfer Station, off Walker Road has been assessed as part of the Council's Waste Site Appraisal and could be an appropriate location for waste management facilities. (3)		
Conclusions: De-allocate, with the exception of the Byker Transfer Station. The likelihood is that Riverside East will come forward for mixed use with an element of employment use. The site provides the opportunity to reconnect St Peters with Ouseburn.		

TOTAL SCORE | 45

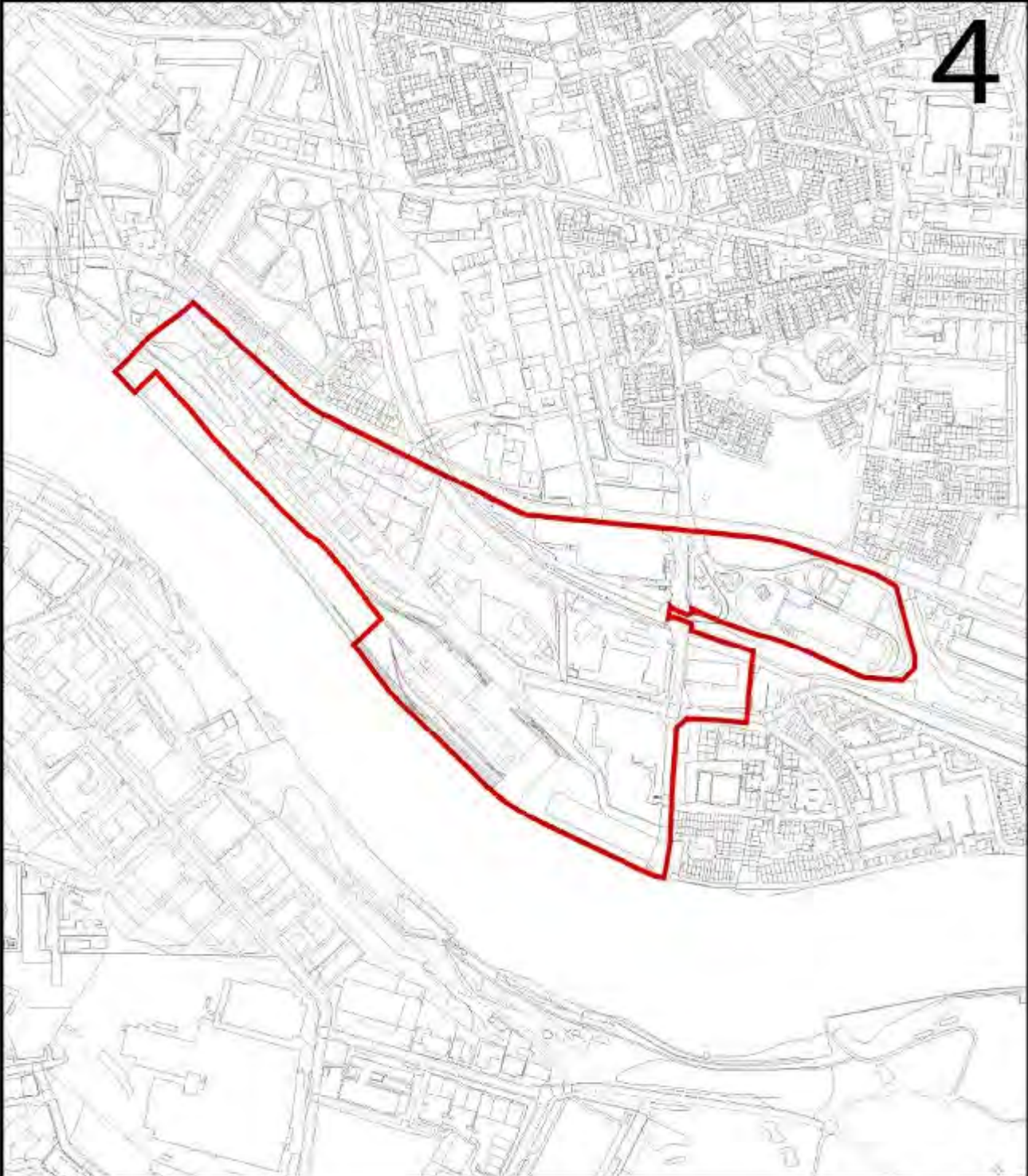
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A4	The Tyne Bar	A4	Free Trade Inn		
B1	Mushroom Works	B1	Northern Stage		
B2	Bel Valves (4 Units)	B2	SAL Abrasive Technologies Group Ltd	B2	ICL Solutions
B2	John Keeson	B2	EMCOR UK	B2	ADP Interiors
B2	Norman Jack – Flooring Specialist	B2	Factory Framing Centre	B2	Rotary Power
B2	Rotary Power	B2	Newcastle City Council Neighbourhood Services		
B8	Jewson	B8	GAP Plant and Tool Hire	B8	HDL Cash & Carry
D1	Royal Marines Commando Training Unit	D1	Byker Ouseburn Regeneration Information Centre		
SG	Tyne Motor Company	SG	Auto Diesel	SG	Jap Cars and Parts
SG	Addington Motor Engineering				
V	Void (11)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A4	C3	D1	SG	Vacant
6%(2)	31%(11)	9%(3)				6%(2)		6%(2)	11%(4)	31%(11)

4



Address : Riverside East

Area (Ha) : 21.2

Map : NZ 2664 SE
NZ 2663 NE/NW

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Drawn By:
J McLaughlin

Ref: ED3.1 (28)	Site Name: Scotswood Road Industrial Estate	Area: 12.1ha
Description: General, modern employment area. Site is adjacent to Gas Distribution Centre and the Arena.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Extensive site which has a mixture of new, refurbished and older buildings. Mix of uses on estate but estate has a concentration of car sales / garages and builders merchants. Large units front onto Scotswood Road with smaller units to the rear. Some demolition work taking place on the former Bristol Street Motors site located on Skinnerburn Road.	Good 4
2) Levels of occupancy	Owned by Newcastle City Council, and let on long term leases (100 years plus). Well occupied with only two visible voids.	Excellent 5
3) Accessibility, servicing & circulation	Good access from Scotswood Road. Average servicing and circulation which is affected by extensive street parking in the area. Location is close to city centre and is serviced by numerous bus routes.	Good 4
4) Constraining land uses	River and road network to the south and north boundaries respectively. North boundary constrained by railway lines and a Gas Distribution Centre.	Fair 2
5) Access to the strategic road network	Good access to Scotswood Road which links into A1 and city centre.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	140,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5).
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site falls within an Area of Strategic Change.	5
10) Environmental constraints	Open space lies to the northern boundary, of the adjacent Scotswood Road.	3
Other considerations: Occupiers on site include car showrooms and builders merchants. (2)		

Redevelopment/improvement potential:

The old leather works site is in a convenient location for a variety of storage and distribution uses, lying between the Elswick Wharf development area and Newcastle Business Park. Its long term future could be reviewed in relation to development trends in the locality. (3)

Conclusions:

De-allocate. Further work required as part of the UCAAP to determine the site's future. Likelihood is that the site will be brought forward in a comprehensive manner with the potential to reintegrate Scotswood Road and the river

TOTAL SCORE	45
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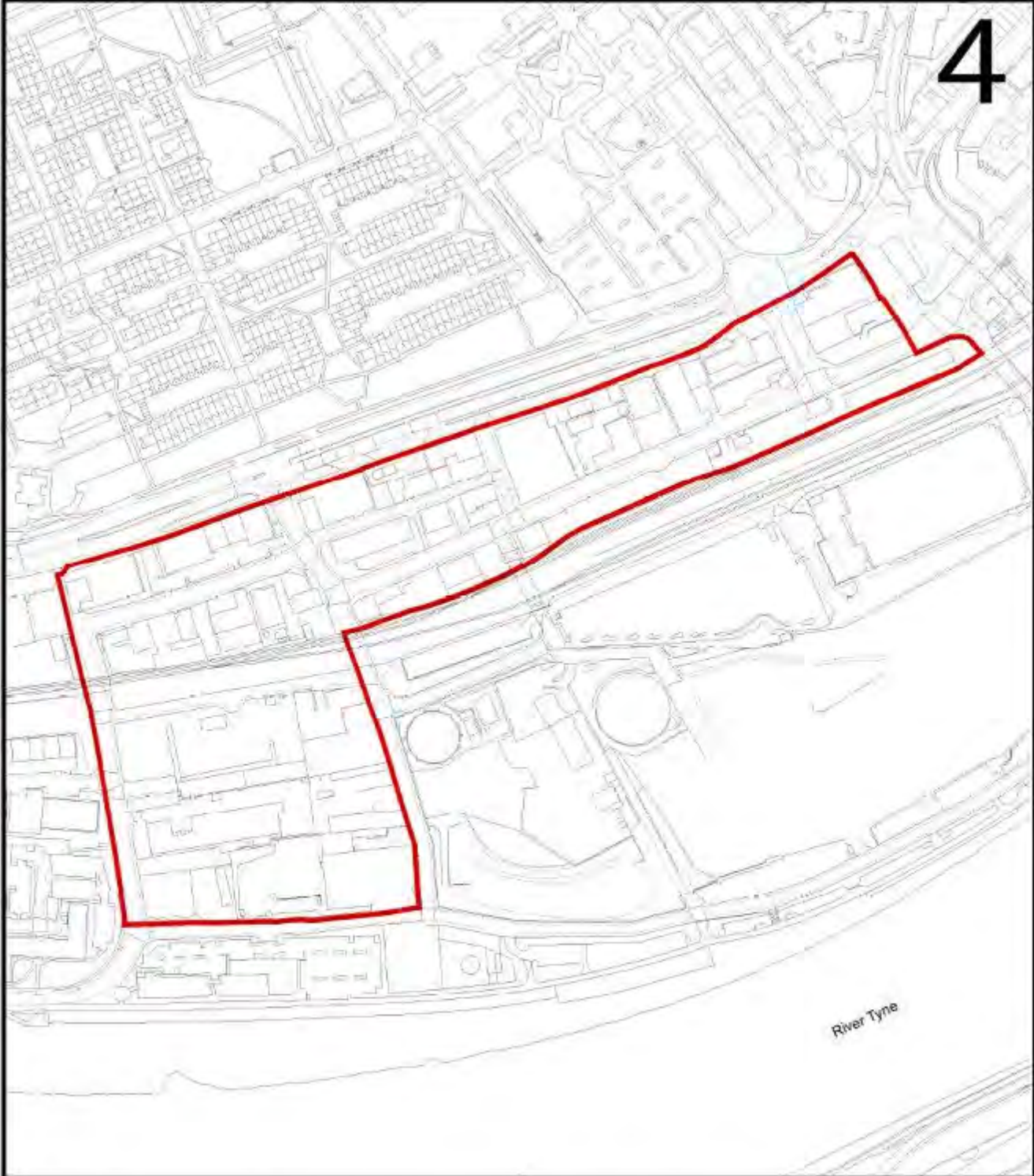
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Speedy Hire	A1	Autosounds	A1	Litecraft
A1	Ride	A1	Porcelanosa	A1	Dandy Events and Party Specialists
A1	Tool Station				
A4	The Globe				
B1	Tyneside Cyrenians	B1	TCUK Property Services	B1	Pattinson Scientific Services
B1	Bolton Bros Ltd	B1	Benfield Accident Repair Centre		
B8	Tsang Foods	B8	Jewson (3 units)	B8	Tiles and Bathrooms
B8	Speedy Hire	B8	ACR – Air Conditioning and Refrigeration Services	B8	Swift Brake and Clutch Ltd.
B8	Nixon Plant Hire	B8	Forward Engineering	B8	Graham
B8	Plumbase	B8	Howdens Joinery Co	B8	Johnstons Leyland
SG	Benfield Motors Kia, Fiat, Skoda	SG	Newcastle Motorcycles (2 units)	SG	BSM Car Wash
SG	Streetfleet MOT Service	SG	Auto Windscreens	SG	Kestrel Truck Services
SG	Arnold Clark Ford	SG	Tom Ferguson Motor Engineers Ltd	SG	K.H.Motors
SG	John Lane Auto Spray Service				

Use Class Proportions

B1	B2	B8	A1	A4	AS	C3	D1	SG	Vacant
13%(5)		32%(12)	19%(7)	3%(1)				27%(10)	5%(2)

4



Address : Scotswood Road Industrial Estate

Area (Ha) : 12.1

**Map : NZ 2363 SE
NZ 2362 NE
NZ 2463 SW**

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**Drawn By:
J McLaughlin**

Ref: ED3.1 (29)	Site Name: Scotswood Road West	Area: 17.4ha
Description: Site is principally Mitchell and Vickers development running along the south side of Scotswood Road.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Units are in good to very good standard. Mix of modern steel frame warehouses and older brick built buildings. Majority of buildings have had internal and external refurbishment.	Good 4
2) Levels of occupancy	Full, no voids.	Excellent 5
3) Accessibility, servicing & circulation	Good, although access is via a busy junction. Limited parking facilities.	Average 3
4) Constraining land uses	Road network and river. Overlooked by housing.	Fair 2
5) Access to the strategic road network	Refurbished and widened A695 – Scotswood Road – provides easy access to city centre and A1, albeit from a busy junction. Pedestrian and cycle paths along with excellent bus connectivity allow access to more sustainable travel options.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	117,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade B (4)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.3 / 0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	3
9) Regeneration policy	The site lies within a Regeneration Growth Area.	5
10) Environmental constraints	Wildlife corridor to the southern boundary. Open space to the north.	3
Other considerations: Other occupiers include Sita (Benwell Waste Transfer Station) and car showrooms including Mill Garages Volvo. (3)		
Redevelopment/improvement potential: BAE Systems has confirmed it will sell the site to engineering firm The Reece Group. (3) Benwell Transfer Station has been assessed as part of the Council's Waste Site Appraisal and could be an appropriate location for waste management facilities. (4)		
Conclusions: Retain.		

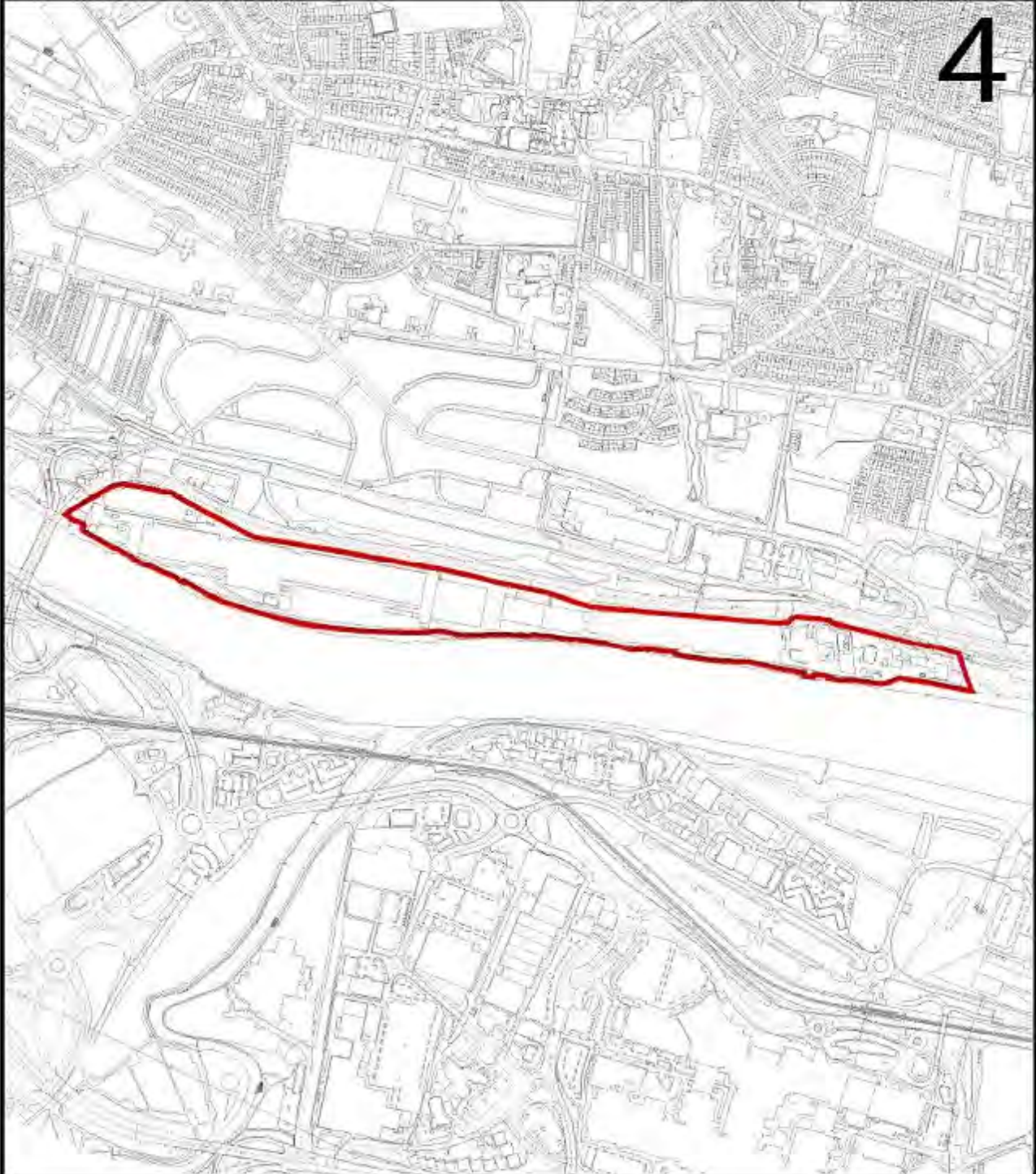
TOTAL SCORE 44
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
B2	Rolls Royce UK	B2	Jobling Pursec Ltd.	B2	BAE Systems Land Systems UK
B2	ADM Pressings				
B8	PTS Plumbing Trade Supplies	B8	Sita		
SG	Benfield VW	SG	Mill Garages Volvo		

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
	50%(4)	25% (2)							25% (2)	

4



Address : Scotswood Road West

Area (Ha) : 17.4

Map : NZ 2063
NZ 2163

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Drawn By:
J McLaughlin

Ref: ED3.1 (30)	Site Name: Shieldfield Industrial Estate	Area: 1.4ha
Description: Small general employment area, modern, part of Ouseburn Regeneration Area.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Recent development on site of student accommodation for Northumbria University – Winn Studios. Industrial units are of a dated design and are in a below average condition. All industrial units have indoor storage and some larger buildings have outside storage.	Fair 2
2) Levels of occupancy	No visible voids but two buildings show signs of being vacant and empty.	Average 3
3) Accessibility, servicing & circulation	Good accessibility, servicing and circulation. Allocated parking in area is not sufficient and there is a large amount of illegal parking. Access for larger vehicles is average. Close proximity to Jesmond and Manors Metro stations.	Average 3
4) Constraining land uses	Site is constrained by residential to the West. To the South of the site lies a railway line and the A193 which is a busy road into the city centre.	Poor 1
5) Access to the strategic road network	Good access to Central Motorway via A193.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	186,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A+ (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is within a Strategic Area of Change.	3
10) Environmental constraints	Site of archaeological interest runs through the south west section of the site.	3
Other considerations: The site lies adjacent to ED3.1(17) (3)		
Redevelopment/improvement potential: The site is no longer 'fit for purpose' and should be de-allocated. The site should be comprehensively redeveloped, guided by the UCAAP. (3)		
Conclusions: De-allocate.		

TOTAL SCORE	36
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Hire Station				
B1	Mobex North East	B1	Sprinkler Protection	B1	Fire Logistics Ltd
B1	Visual Concept				
B8	Crosbys Catering Supplies	B8	Crosbys Catering Supplies	B8	Johnstones Leyland Decorating Centre
B8	PTS Plumbing Trade Supplies				
D1	Northumbria University Accommodation				
V	Void (x2)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
33%(4)		33%(4)	8%(1)					8%(1)		17%(2)

4



Address : Shieldfield Industrial Estate

Area (Ha) : 1.4

Map : NZ 2564 NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (31)	Site Name: Shields Road West	Area: 7.2ha
Description: Older small-scale general employment area adjoining district centre. Majority of the northern side of Shields Road West contains many A1 retail uses. Vacant / derelict warehouses on the north of Heaton Terrace.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Majority of site has average to good quality buildings but there are some buildings that are in a dilapidated condition. Primarily brick built offices and warehouses with some steel framed warehouses and workshops.	Average 3
2) Levels of occupancy	Good occupancy levels with only 3 visible voids. There are 4 derelict buildings on site with no use or advertisement.	Average 3
3) Accessibility, servicing & circulation	Good access, but circulation is average on the majority of site but some parts are poor and servicing is congested. Majority of sites have allocated parking but this does not seem adequate as there is a lot of on street parking.	Average 3
4) Constraining land uses	Metro to the southern boundary and railway to the northern boundary, residential to the south. Cleared space to the north of Heaton Terrace.	Average 3
5) Access to the strategic road network	Close proximity to Central Motorway and Coast Road which connects to A19.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	173,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5

10) Environmental constraints	Open space to the southern boundary.	3
Other considerations: The adjacent Shields Road Retail Centre is underperforming and is defined as being 'at risk'. (2)		
Redevelopment/improvement potential: Site provides affordable accommodation in an accessible location. However, it is arguable as to whether the site is still fit for purpose. (2)		
Conclusions: De-allocate. Site will remain in employment use but won't be protected in the future. The site could come forward comprehensive redevelopment, guided by the UCAAP.		

TOTAL SCORE 42

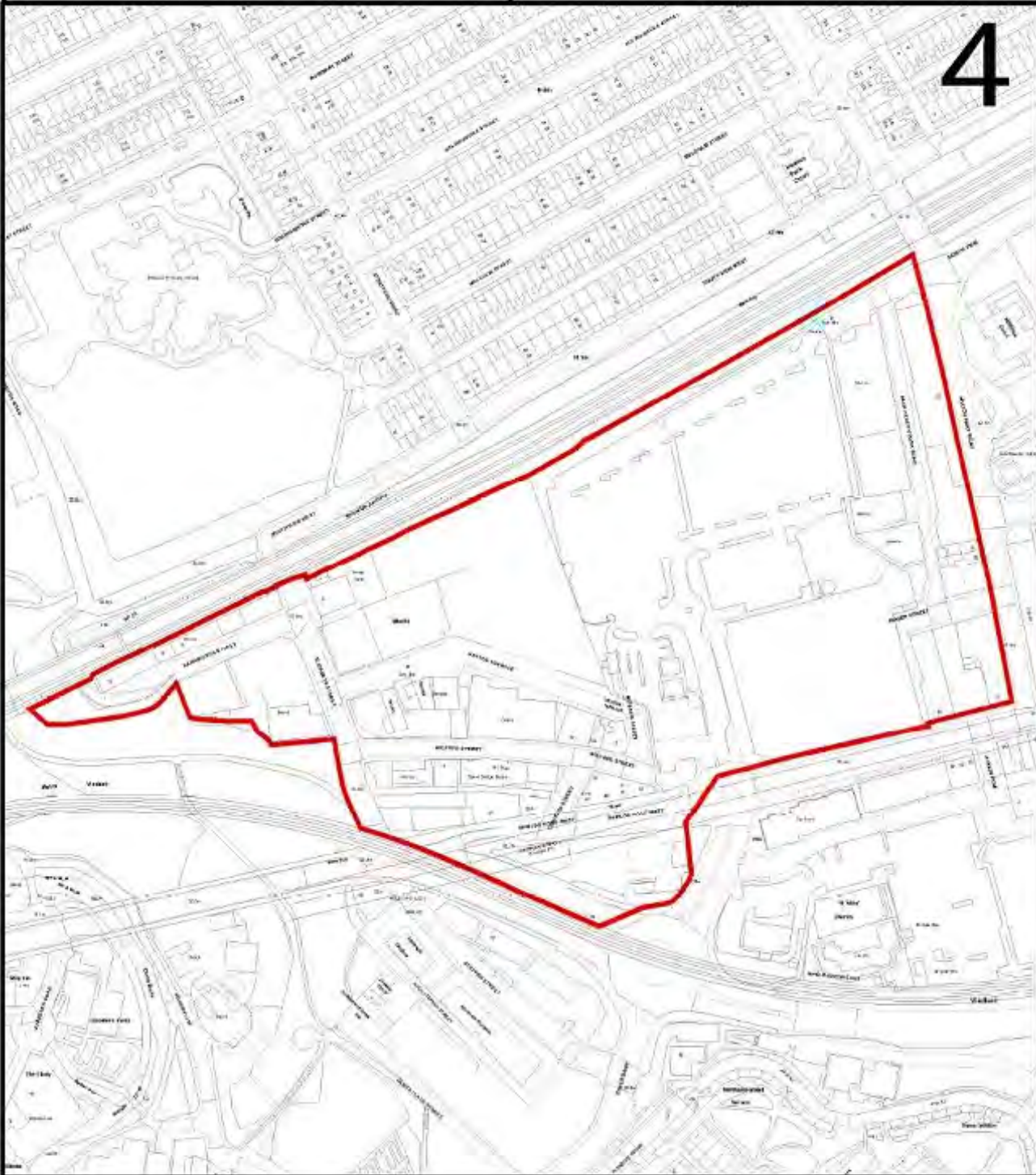
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	W M Morrison	A1	British Heart Foundation - Furniture & Electricals	A1	A & S Discount
A1	Newbiggin Carpet Centre (Byker)	A1	Venus II Hair Studio	A1	
A5	Mei Mei Chinese Takeaway				
B1	NQA	B1	The Byker Bridge Workshop		
B2	Brick Works	B2	Recyke y'bike	B2	Byker Bridge Marine
B2	J.A. Potts Scrap Metal Merchants				
B8	Community Transport And Furniture Service	B8	Holme Dodsworth (Rock Salt) Ltd	B8	Holme Dodsworth Metals Ltd
D1	Tyneside Women's Health	D1	Better by half	D1	Byker Bridge Housing Association
D1	Joseph Cowen Healthcare Centre				
SG	ERB Services Ltd	SG	Mo-Tech	SG	BP
SG	Gills of Byker	SG	CA Motors	SG	Newcastle Auto Centre
SG	Byker Tyres	SG	Doug Harrison Vehicle Repairs	SG	Kelly's Garage

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D1	SG	Vacant
6%(2)	11%(4)	8%(3)	14%(5)			3%(1)		11%(4)	26%(9)	20%(7)

4



Address : Shields Road West

Area (Ha) : 7.2

Map : NZ 2664 NW/NE

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Drawn By:
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Ref: ED3.1 (32)	Site Name: Shields Road / Fossway (includes Benfield Business Park)	Area: 41.7ha
Description: 19th/20th century general employment area, mainly Siemens complex, now more varied. The allocation also includes Benfield Business Park.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Extensive site that is dominated by Siemens site and large cleared sites that surround. There is a considerable mix of ages, sizes and designs of buildings within this site. Some buildings are new or have been recently refurbished while others, predominantly brick built, show signs of poor upkeep and dilapidation. Some buildings to the west of the site looked to have changed use to residential. Benfield Business Park has an extensive collection of buildings for industry and business that are being adapted for various uses.	Good 4
2) Levels of occupancy	8 visible voids in area and for sale signs on cleared land. Majority of voids were found in the smaller studio offices on Benfield Business Park.	Good 4
3) Accessibility, servicing & circulation	Access into and onto site is very good, with the majority of businesses having allocated parking and access facilities for larger/specialist vehicles. The mix of uses on site has created a service economy. Close access to Metro via Chillingham Road and Walkergate. Close proximity to city centre.	Good 4
4) Constraining land uses	Site is constrained by surrounding residential and existing infrastructure of railway lines and Metro. The site also borders with the Brough Parkway Industrial Estate.	Fair 2
5) Access to the strategic road network	No direct access to A1058 and A167(M) – positioning is away from A1 and A19.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	166,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.3 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	2
9) Regeneration policy	Area south of the railway line is located within a Regeneration Growth Area.	3

10) Environmental constraints	Wildlife Corridor runs through the site along the Metro line. Site of Archaeological interest runs along the Fossway encroaching the site.	2
Other considerations: The adjacent Shields Road Retail Centre is underperforming and is defined as being 'at risk'. (2)		
Redevelopment/improvement potential: The Council's Urban Design Team are preparing a strategic framework for the Fossway Development Area. This involves looking at the development blocks on the IRDL and the two Siemens sites, links between them, and to the surrounding area. Improvements to the highway network are crucial to this process. (3) Siemens South Side, Shields Road North has been assessed as part of the Council's Waste Site Appraisal and could be an appropriate location for waste management facilities.(3)		
Conclusions: De-allocate.		

A) Miller Road Triangle, B) B&Q, C) IRDL, D) Quarry (Play Centre), E) Turstall Avenue, F) Brough Park Industrial Estate, G) Newcastle Stadium, H) BT Depot, I) Siemens (Retained a), J) Siemens (South), K) Newcastle Shopping Centre, L) Chillingham Industrial Estate, M) Siemens (North), O) Siemens (Retained b), P) Bus Depot, Q) Lidl, R) Works, S) Woolsington Hotel, T) Benfield Business Park

TOTAL SCORE	36
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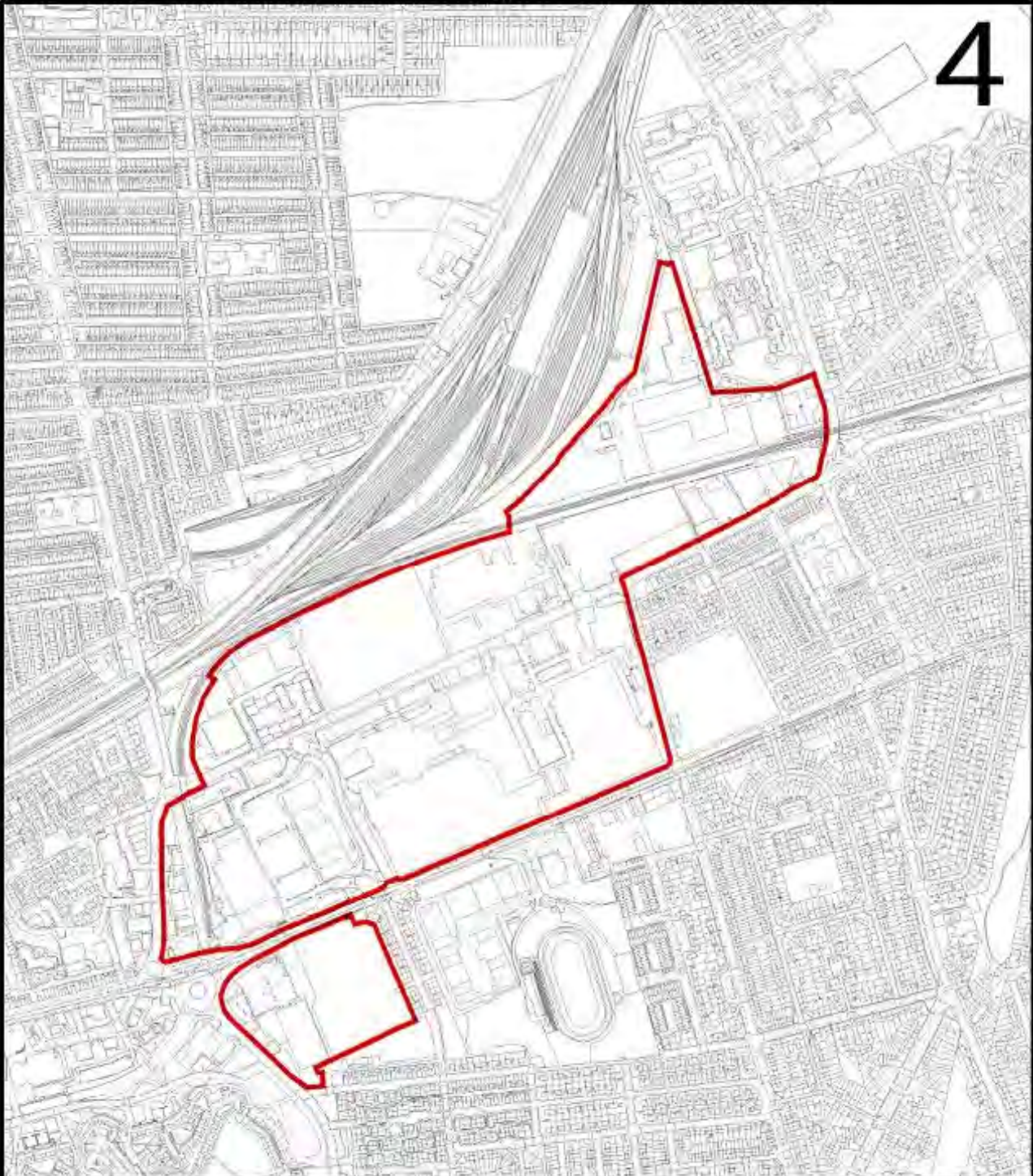
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	DW Fitness Shop	A1	B & M Home Store	A1	T K Maxx
A1	Bentinck – Furniture	A1	Marks & Spencer Outlet	A1	Lidl
A1	Asda	A1	Carpetright Plc	A1	Argos
A1	B & Q	A1	HSS Hire Shop		
A2	W.S.Harrison & Son – Funeral Directors				
A4	Woolsington Hotel	A4	PTE Social Club		
B1	BT	B1	Videx	B1	Eldon Display
B1	KNW	B1	G.A.P		
B2	Siemens Power Generation (2sites)	B2	Wall & Floor Times Ltd.	B2	Holsta
B2	Exova	B2	Flowserve Pumps Ltd	B2	ANA Marine Ltd
B2	Finside	B2	Tagg Equestrian	B2	John Mills Valves
B2	Peacocks				
B8	North Eastern Glass – Dane	B8	Premier Electrical (NE) Ltd	B8	Ceramic Tile Distributors
B8	CSP	B8	U Hold The Key	B8	Group 4 Security
B8	Stagecoach	B8	W.D.Close & Sons Ltd.	B8	Network Rail
B8	Hogg Engineering	B8	Heritage Services Ltd.		
D1	DCS Training Ltd	D1	Benfield Park Healthcare		
D2	DW Fitness Club	D2	The Fun Factory	D2	Universal Martial Arts Studio
SG	Eric Christer MOT	SG	SJ Autos Motor Factors	SG	Shell
SG	Centreville Garage Ltd.	SG	Arc Car Wash		
V	Void (x8)				

Use Class Proportions

B1	B2	B8	A1	A3	A4	D1	D2	SG	Vacant
9%(5)	16%(9)	20%(11)	20%(11)		4%(2)	4%(2)	5%(3)	9%(5)	14%(8)

4



Address : Shields Road / Fossway

Area (Ha) : 41.7

Map : NZ 2764 NW/NE
NZ 2765 NE/SE/SW
NZ2865 NW/SW

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Drawn By:
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Ref: ED3.1 (33)	Site Name: Throckley Industrial Estate	Area: 20.6ha
Description: General, modern employment area, including Ibstock brickworks.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern, traditional employment area in good condition. Majority of sites have indoor and outdoor storage facilities. Parking is an issue at this site, which is causing on road parking.	Excellent 5
2) Levels of occupancy	Larger units are fully let but the site does have voids in the smaller to medium units.	Good 4
3) Accessibility, servicing & circulation	Easy access from the A69. Average servicing and circulation – roads and site are large enough to accommodate HGVs.	Good 4
4) Constraining land uses	Green Belt and residential to south of site.	Average 3
5) Access to the strategic road network	Good access to Ponteland Road and the A69 which links to the A1, albeit in an out of town location.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	36,000+ economically active people within 30 minutes of site by public transport.	Poor: Accessibility Grade D: 2
7) Social development	Site not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	Below Average: 2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	Below Average: 2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	Average: 3
10) Environmental constraints	North, east and western boundaries adjacent to Green Belt. Eastern side adjacent to area of exceptional landscape value and western edge adjacent to local nature reserve.	Above Average: 4
Other considerations: Popular affordable units. (3)		
Redevelopment/improvement potential: Site is trading reasonably well, and provides affordable accommodation in an accessible location. (3)		
Conclusions: Retain.		

TOTAL SCORE	39
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	The Hop, The Vine				
A3	The Lunch Box	A5	Jeera Indian Takeaway		
B1	Essential Aluminium	B1	Bathrooms by Design	B1	UK Industrial Tapes Ltd.
B1	John Arthur & Son Ltd.	B1	GSM Kitchens	B1	Tony Quinn Drilling Ltd.
B1	The Glass Man	B1	Pmh Interiors Limited	B1	NCR Leather Cosmetics Ltd.
B2	Ibstock	B2	Gateland (North East) Ltd		
B2	Clentec Cleaning Services	B2	Scott-Matrix Ltd	B2	Warmseal Windows (Newcastle) Ltd
B2	NEL Technologies Ltd	B2	Brush Technology Ltd	B2	Essential Aluminium
B8	Quicksilver	B8	Initial Medical Services/Rentokil Initial	B8	Warren Butterworth
SG	Lloyd Ltd	SG	Christers Garage	SG	Throckley Bike & Tool Chandlers Car Care
SG	G.B.R Automotive Body Repair	SG	Waltons Luxury Coach Travel	SG	
SG	TMC Garage	SG	JMS Autos		
V	Void (x4)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D1	SG	Vacant
26%(9)	23%(8)	9%(3)	3%(1)		3%(1)	3%(1)			23%(8)	11%(4)

4



Address : Throckley Industrial Estate

Area (Ha) : 20.6

Map : NZ 1567
NZ 1667 SW

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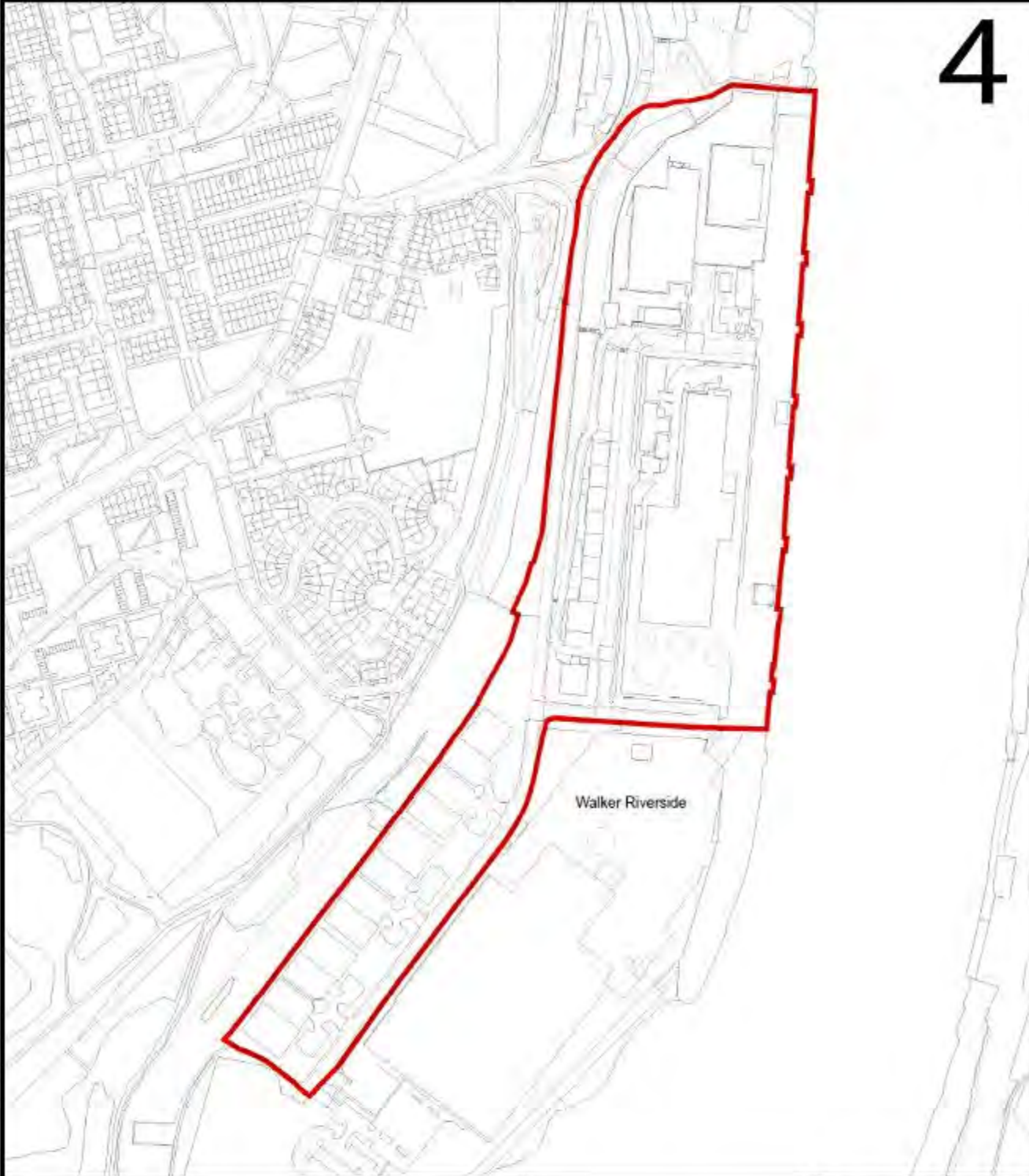
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Drawn By:
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Ref: ED3.1 (34)	Site Name: Walker Riverside Industrial Park	Area: 11.3ha
Description: 19th/20th century general employment area, and specialist offshore, sub-sea uses, partly in Walker Riverside AAP and adjacent to Neptune Energy Park.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Building stock on this site is primarily good to excellent - with the majority of buildings built specifically with end user in mind. Facilities on site are particularly linked to research and development of offshore equipment. However, some stock is reasonably old and in need of refurbishment.	Good 4
2) Levels of occupancy	For the size of site the level of voids was very low – only 2 modern units are void.	Good 4
3) Accessibility, servicing & circulation	Access via Walker Road –majority of site roads have been widened to accommodate larger / specialist vehicles for the site. Duco and Shepherd Offshore have secure access to site with allocated parking and delivery roads.	Good 4
4) Constraining land uses	Residential to the western boundary, the River Tyne to the east.	Average 3
5) Access to the strategic road network	Is via Walker Road which links the city centre and the A19/Tyne Tunnel.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	55,000+ economically active people within 30 minutes of site by public transport.	Poor: Accessibility Grade D (2)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.3 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	5
9) Regeneration policy	The site lies within a Strategic Area of Change.	5

4



Address : Walker Riverside Industrial Park

Area (Ha) : 11.3

Map : NZ 2963
NZ 2964 SE

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Drawn By:
J McLaughlin

Ref: ED3.1 (35)	Site Name: Walker Riverside	Area: 40.90ha
Description: Significant industrial area in Walker. There is a good base of engineering manufacturing companies with growth potential. There are also opportunities presented by vacant sites both within and to the north of the Walker Riverside boundary which form part of the Council's emerging employment land portfolio.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Site is undergoing extensive redevelopment.	N/A
2) Levels of occupancy	Majority of site is empty due to redevelopment.	N/A
3) Accessibility, servicing & circulation	Accessibility, servicing and circulation are being improved as part of the redevelopment.	N/A
4) Constraining land uses	Residential, to the western boundary. The Neptune Yard site is 26% within the Environment Agency Flood Zone 3, and the A&P yard 44%.	2
5) Access to the strategic road network	Walker Road provides access to city centre and links into A19/Tyne Tunnel	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	78,000+ economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade C (3)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.3 / 0.5 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site lies within a Strategic Area of Change.	5
10) Environmental constraints	Wildlife corridor to the eastern boundary, open space to the western boundary.	3
Other considerations: The River Tyne North Bank Regeneration Strategy identifies within the sub-sea sector, a requirement for up to 46,500 of additional manufacturing/warehouse floorspace and up to 465,000 of additional yard space with quayside access. (4)		
Redevelopment/improvement potential: Walker has developed as a centre of excellence for sub-sea technology, and as such the site should be retained. Site ref: 1289, 1297, 4137, 4438, 4476, 5234 and 5253 form part of the Council's emerging LDF Employment Land Review. (4) Walker Riverside North has been assessed as part of the Council's Waste Site Appraisal and could be an appropriate location for waste management facilities. (4)		
Conclusions: Retain.		

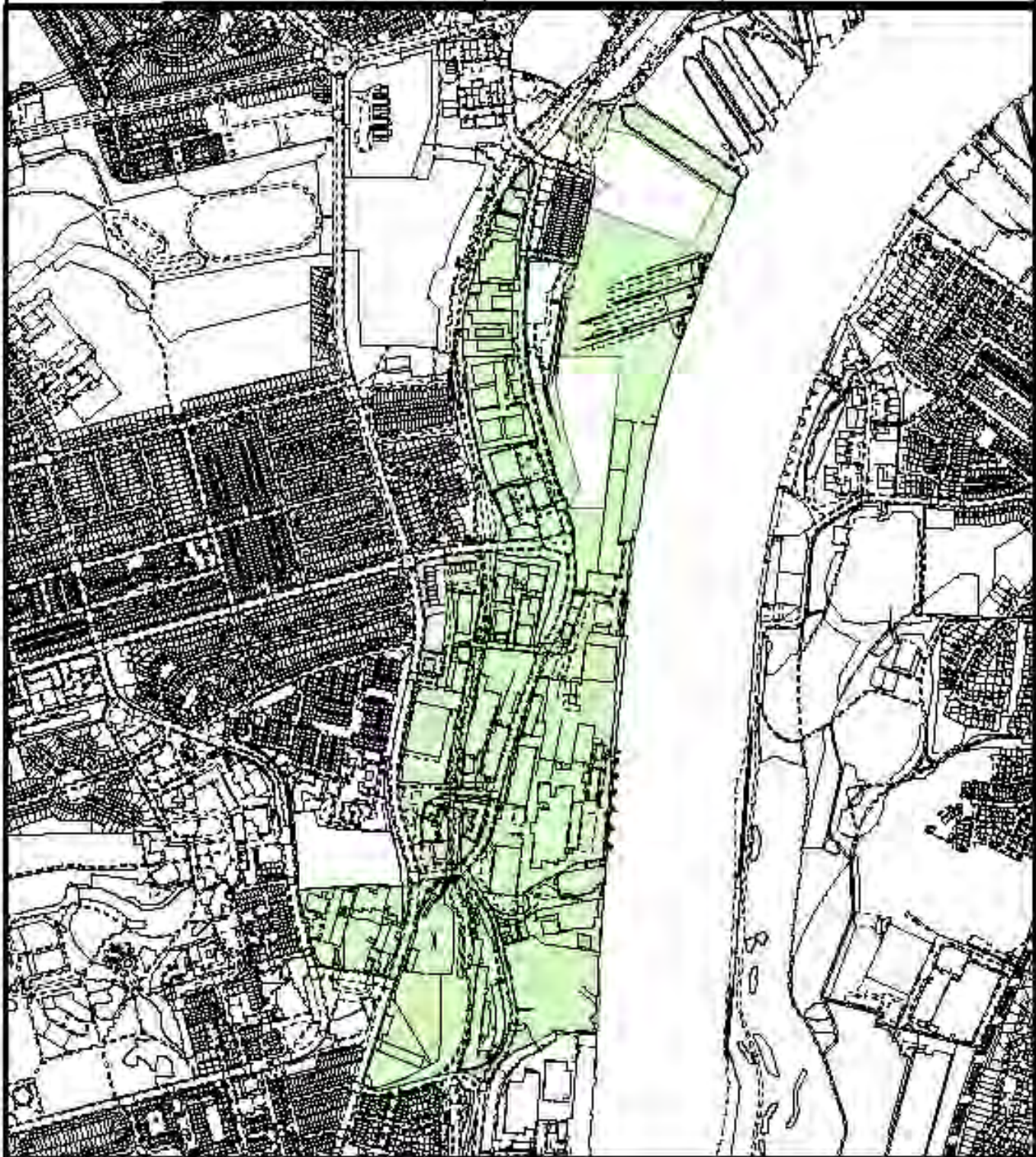
TOTAL SCORE	34
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
B1	Integrati				
B2	Parsons Engineering	B2	Watson Norie Ltd.	B2	Lloyds British
B2	Minster Insulation and Drylining	B2	Houghtons International Services Ltd.	B2	Nitelites Ltd.
B2	Benfield Shrink and Seal Ltd.				
B8	Shepherd Offshore Services Ltd	B8	R.Blackett Charlton		
D1	Newcastle College (2 Units)				
SG	Parkside Garage				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
8%(1)	54%(7)	15%(2)						15%(2)	8%(1)	N/A



Address : Walker Riverside

Area (Ha) : 40.90

Map: 2965NE/SE
2964NE/SW

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Scale : 1:8,000

Date: 17/04/2013

Drawn by : DMH

Paul Robertson
Director of Resources & Performance
Environment & Regeneration

Ref: ED3.1 (35)	Site Name: Neptune Energy Park (Phase 2i)	Area: 4.03ha
Description: The site forms part of the former Neptune Yard which has been split into a number of development phases to enable a new industrial park associated with off shore related technology industries. This site is situated on the central part of the former Neptune Shipyard.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	New (2012) Purpose built manufacturing unit	Excellent (5)
2) Levels of occupancy	Fully occupied – purpose built factory for the site	Excellent (5)
3) Accessibility, servicing & circulation	Purpose built access road from Fisher Street. There are at times, substantial vehicle movements associated with the delivery of materials, including a heavy load crane.	Good (4)
4) Constraining land uses	Residential to the west.	Average 3
5) Access to the strategic road network	Nearly created access from Fisher Street. Fisher Street connects to Walker Road (A186)	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	78,000+ economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade: 3
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.3 / 0.5 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Regeneration Growth Area	5
10) Environmental constraints	Eastern half of the site is within Flood Zones 2 and 3. The finished floor level of the factory is 500m above the 1 in 200 year event flood level and would allow for climate change during the anticipated life of the development.	3
Other considerations: The development of this site also included the use of the adjoining land between the proposed factory and the riverside quay area for vessel/mobilization/demobilization for associated projects within the Neptune Energy Park. (4)		
Redevelopment/improvement potential: The factory on-site was purpose built in 2012 as a wire rope manufacturing facility. No improvements are required. (4)		
Conclusions: Retain		

TOTAL SCORE	48
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(Scoring: 5 = best, 1 = worst)

Ref: ED3.1 (36)	Site Name: Warwick Street	Area: 4.5ha
Description: 20th century mixed use area, now with limited employment use.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Mixture of buildings and uses on site, with various purposes from car sales to office space and some residential. The motor vehicle garages have recently been refurbished and the smaller office space at Forest House is of good quality. Buildings have allocated parking.	Good 4
2) Levels of occupancy	Advertised voids are few but the smaller office space looks considerably vacant. One larger warehouse, in poor condition is being actively marketed. Biscuit Tin Studios look very busy.	Average 3
3) Accessibility, servicing & circulation	Access, servicing and circulation are average – parking constraints are in operation and on site roads are narrow, which may constrain the operational efficiency larger vehicles. Site is close to city centre and is within walking distance to Metro.	Average 3
4) Constraining land uses	Surrounded by residential and to the south open space.	Average 3
5) Access to the strategic road network	Good access to central motorway and the city centre.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	165,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not within a Strategic Area of Change.	3
10) Environmental constraints	Open space to the southern and east boundary. Conservation Area lies to the western boundary. Site is also adjacent to	3

an area of archaeological interest at its eastern end.

Other considerations: Close proximity to proposed offices and student accommodation at Portland Green. Student accommodation under construction at Stoddart Street. (2)

Redevelopment/improvement potential: Transient area with a range of uses could come forward for mixed uses in the future as part of a comprehensive redevelopment. (2)

Conclusions:
De-allocate. Site will remain in employment use but won't be protected in the future.

TOTAL SCORE 36

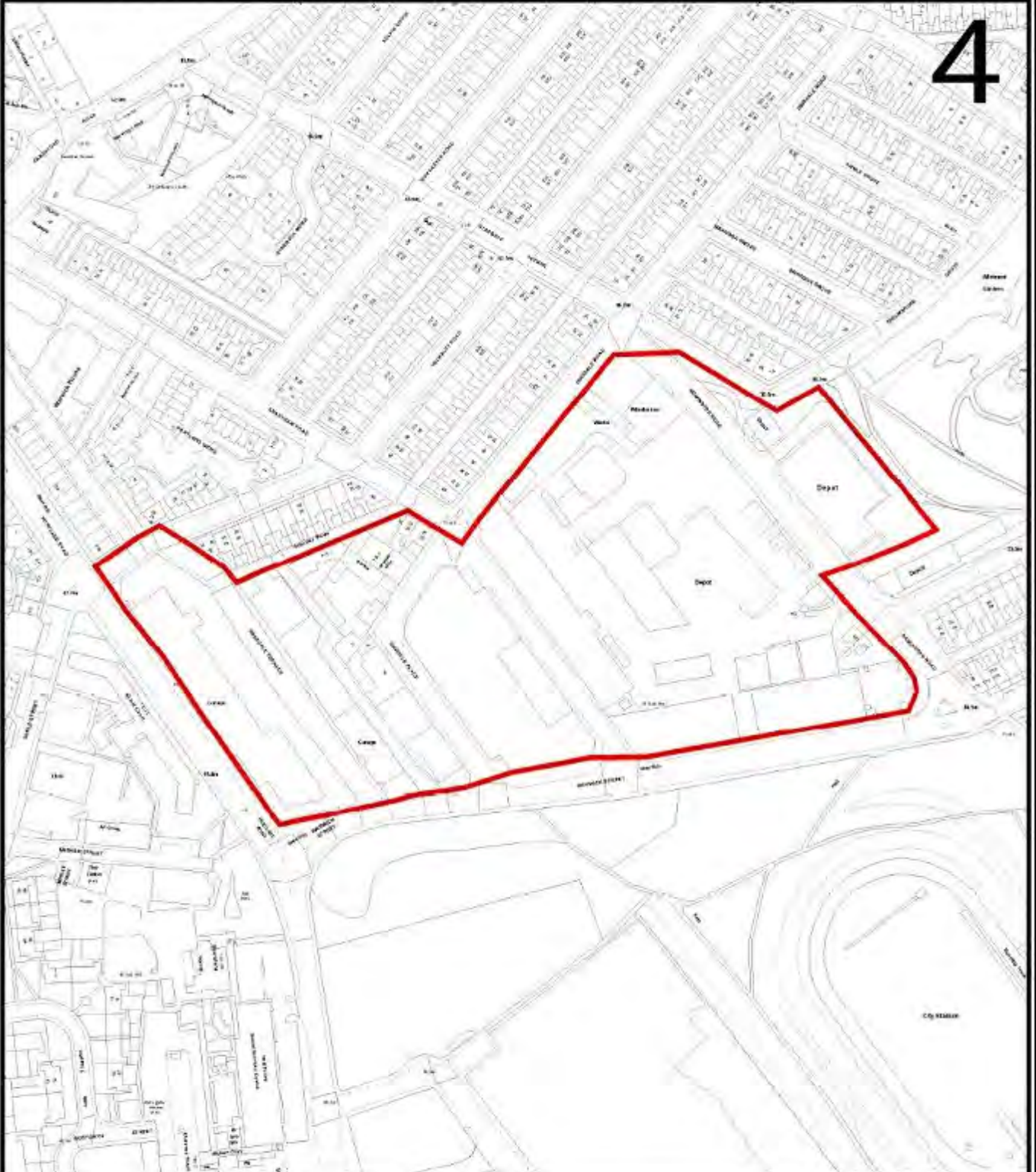
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Loco				
B1	Thomas R Dixon And Company	B1	A & B Industrial Services (North East) Ltd	B1	Hunter Johnstone Marketing
B1	Keystone Estates	B1	FPP	B1	The Biscuit Tin Studios
B1	Blueprint – Interior Design	B1	Lefthandgary		
B8	Tyne Moulds And Machinery Co Ltd				
SG	Benfield Nissan	SG	Benfield Alfa Romeo	SG	Newcastle City Council Neighbourhood Services
SG	Triumph North East				
V	Void (x6)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	SG	Vacant
40%(8)		5%(1)	5%(1)						20%(4)	30%(6)

4



Address : Warwick Street

Area (Ha) : 4.5

Map : NZ 2565 SE
NZ 2665 SW

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Scale : 1:2,500 @ A4

Date of
Publication: 31/03/2010

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Drawn By:
J McLaughlin

Ref: ED3.1 (37)	Site Name: Westerhope Industrial Estate	Area: 8.1ha
Description: Modern, general/light employment area.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Mixture of unit sizes and styles. Estate has offices, warehouse and business/industrial units. Mix of age - some very recent developments with some older buildings. Overall, a busy but well maintained estate.	Good 4
2) Levels of occupancy	Low amount of voids for the size of estate – 4 - which are all located within the smallest units on the estate.	Good 4
3) Accessibility, servicing & circulation	Some access roads are becoming dilapidated along with damage to perimeter fencing. Servicing and circulation are good in terms of size but allocated parking is not sufficient. Site is serviced by various bus routes.	Fair 2
4) Constraining land uses	Near residential area and school.	Average 3
5) Access to the strategic road network	Stamfordham Road and Newbiggin Lane provide adequate access to the Western Bypass – however at peak times there is considerable congestion.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	94,000+ economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade B (4)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.2/0.3 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	3
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	2
10) Environmental constraints	Adjacent to Green Belt on Western Boundary and allocated open space.	2
Other considerations: Edge of town location.(2)		
Redevelopment/improvement potential: The site is surrounded by sensitive land uses and suffers fro high vacancy rates. (2)		

Conclusions:

De-allocate. Site will remain in employment use but won't be protected in the future.
Redevelopment of the site should be brought forward in a comprehensive manner (3).

TOTAL SCORE	35
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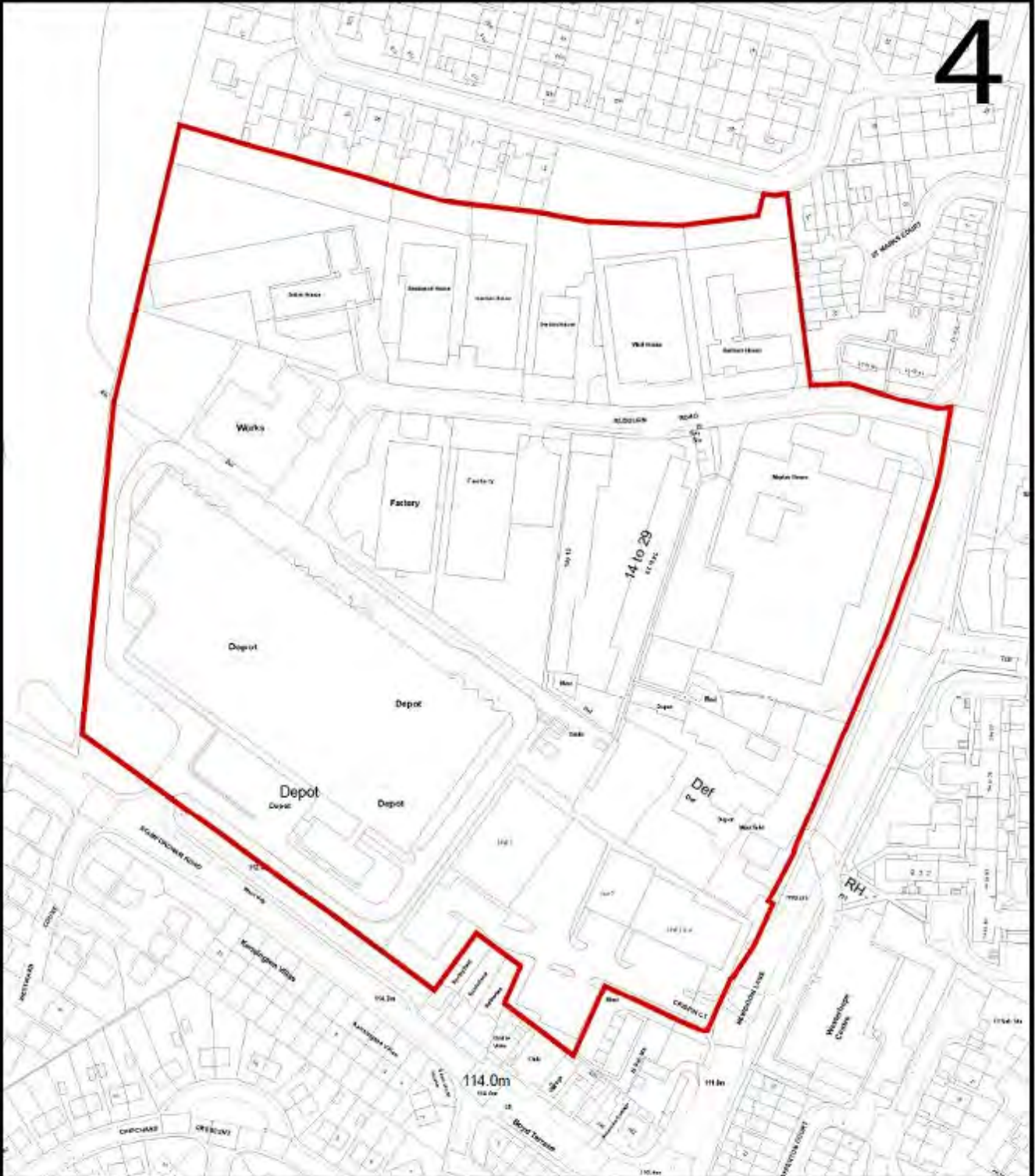
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Westerhope Window Tints	A1	Taximeter Services	A1	Co-operative Funeral Service
A1	DDM Performance	A1	Westerhope Tile Centre	A1	Kenton Carpets
A3	Gormans Fish & Chips				
A5	Dynamite k&k Pizza	A5	Spicy China	A5	Rao Balti House
A5	Deb's Dinner				
B1	Kaydian	B1	Clic Time Holdings Ltd.	B1	Meadownet Ltd.
B1	LP Construction	B1	R.M.G.	B1	Steedman and Co.
B1	Kinnair and Company	B1	Accountsbynet Ltd	B1	McGuiness Insulation Ltd.
B1	Quartermen's Transport Ltd.	B1	UK Bathrooms Ltd.	B1	J.A.Bains
B1	The Will Writing Company	B1	Weatherseal Home Improvements Ltd.	B1	North East Hire and Sales
B2	Motoring Services	B2	Robinson and Howe Furniture Manufacturers	B2	Hart Door Systems Ltd
B2	S & B Rollershutters	B2	M and G Windows	B2	Rea's Ices Ltd
B2	The Tiling Company Ltd	B2	Birch Tree Northern Ltd	B2	R and J Electrical and Telecommunications
B2	S and T Roofing	B2	Make Me a Fake	B2	WDL Newcastle
B2	Newcastle Sliding Sash Windows	B2	J.Hindmarsh	B2	Morton Glaziers
B2	David Gray Building Services	B2	CD Auto Valeting	B2	A.Douglas Construction
B2	Westerhope Upholstery	B2	C.A.R.S.	B2	Naked Image
B2	Northern Electrical Distributors Ltd.	B2	Kitchen Xchange	B2	SRM
B2	The Wheel Specialist	B2	Prism Medical UK	B2	Dixons of Westerhope
B2	Toro Trading Ltd.				
B8	Hadrian Packaging	B8	Palatine Beds		
D2	Olympia Gym				
SG	Swift Motor Engineering	SG	DS Commercials	SG	Redburn Motor Company
SG	Anderson & Garland Auctioneer	SG	Ride-Right.Co.Uk	SG	Newcastle City Council - Social Services Transport
V	Voids (4)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A5	C3	D2	SG	Vacant
23%(15)	43%(28)	3%(2)	9%(6)			6%(4)		1%(1)	9%(6)	6%(4)

4



<p>Address : Westerhope Industrial Estate</p>	<p>Area (Ha) : 8.1</p>	<p>Map : NZ 1967</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I., Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
<p>Scale : 1:2,000 @ A4</p>	<p>Date of Publication: 31/03/2010</p>	<p>© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009. Drawn By: J McLaughlin</p>

Ref: ED3.1 (38)	Site Name: Whitehouse Road	Area: 3.1ha
Description: The Premier Development Centre and the Whitehouse Road Enterprise Centre are both within the same building. The Premier Development Centre is managed, whereas the Enterprise Centre is privately let units.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Mix of brick and steel warehouses in a well maintained condition. Small to medium sized units. Some have office space and outside storage.	Good 4
2) Levels of occupancy	No visible voids.	Excellent 5
3) Accessibility, servicing & circulation	Reasonable access, servicing and circulation. Ample parking on estate.	Good 4
4) Constraining land uses	Refurbished green space to the north and a considerable development to west.	Average 3
5) Access to the strategic road network	Good access to Scotswood Road which links to A1 and city centre.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	125,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.3 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	3
9) Regeneration policy	The site lies within a Regeneration Growth Area.	5
10) Environmental constraints	Open space to the north, east and western boundaries. Wildlife corridor to southern boundary.	3
Other considerations: See Loadman Street (1515) (3)		
Redevelopment/improvement potential: Site due to be redeveloped by Priority Sites who will demolish the existing building and then build out circa. 135,000 sqft of commercial space. (4)		
Conclusions: Retain		

TOTAL SCORE	48
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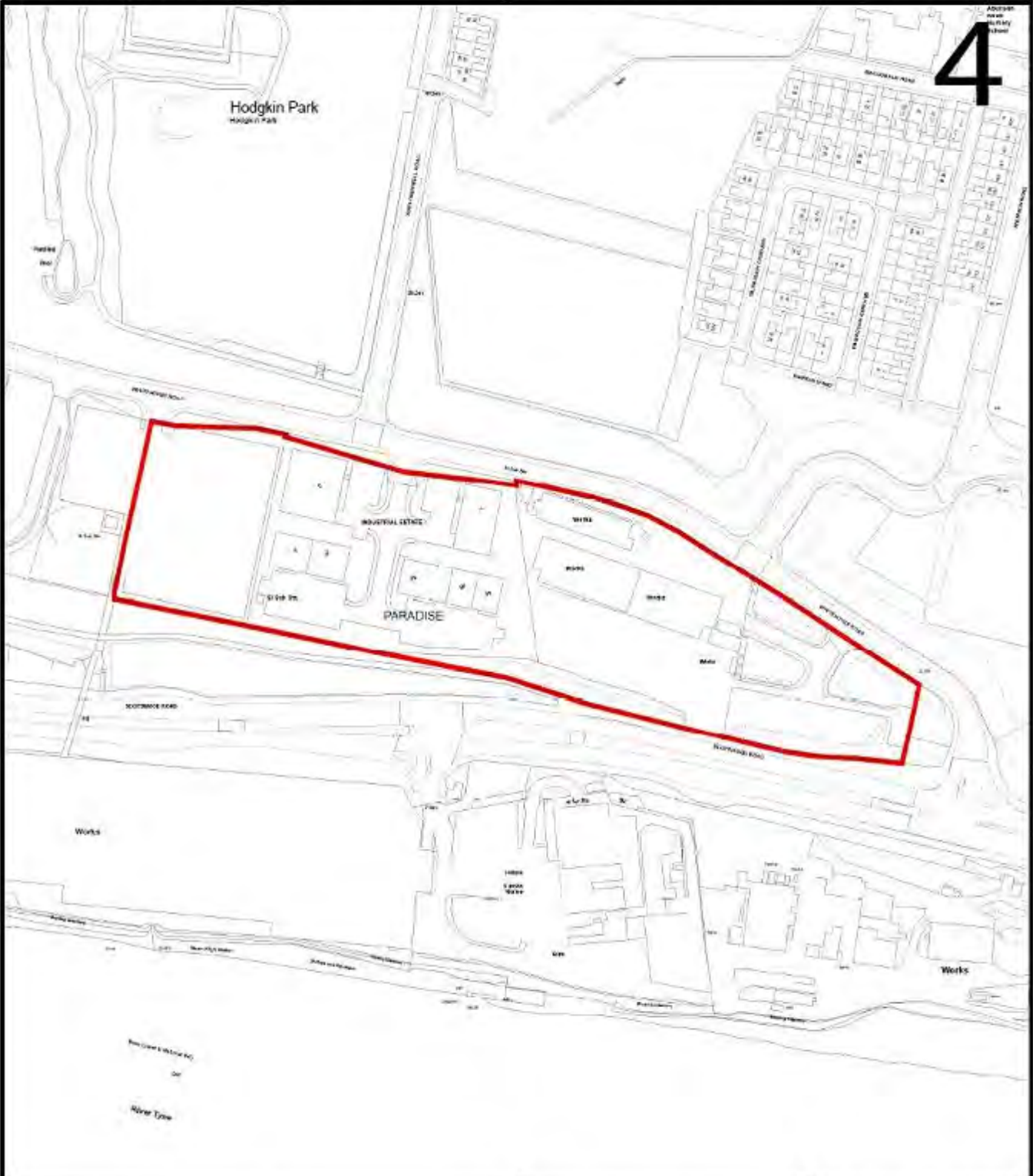
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
B1	DCS Direct Construction and Safety Training				
B2	PTS				
B8	LRN Distribution	B8	Godiva Bearings	B8	Metal Spinners

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	SG	Vacant
20%(1)	20%(1)	60%(3)						(0)

4



Address : Whitehouse Road

Area (Ha) : 3.1

Map : NZ 2163 NW/NE

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Drawn By:
J McLaughlin

Ref: ED3.1 (39)	Site Name: Whickham View	Area: 0.6ha
Description: Small single user site in isolated residential location.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Site consists of only one large factory (converted for use as BizSpace) with accompanying shop. Reasonable condition with storage access.	Average 3
2) Levels of occupancy	High proportion of voids - 6.	Fair 2
3) Accessibility, servicing & circulation	Access, servicing and circulation are poor. There is limited parking at the site and few local amenities in the area.	Fair 2
4) Constraining land uses	Surrounded by residential.	Poor 1
5) Access to the strategic road network	Close to Western Bypass and A695 but no direct route. Site is over 4 miles from city centre and is serviced by only a few bus routes.	Fair 2
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	125,000+ economically active people within 30 minutes of site by public transport.	Good: Accessibility Grade B (4)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site lies within a Regeneration Growth Area.	5
10) Environmental constraints	Area of archaeological interest on eastern edge of factory site.	3
Other considerations: The BSAAP identifies the site as being retained under UDP Policy ED3.1 for industrial use. (2)		
Redevelopment/improvement potential: The site is surrounded by residential and isn't trading well. The site could be redeveloped for housing or community uses, although residential development does not stack up under current market conditions. (2)		
Conclusions: De-allocate .		

TOTAL SCORE	35
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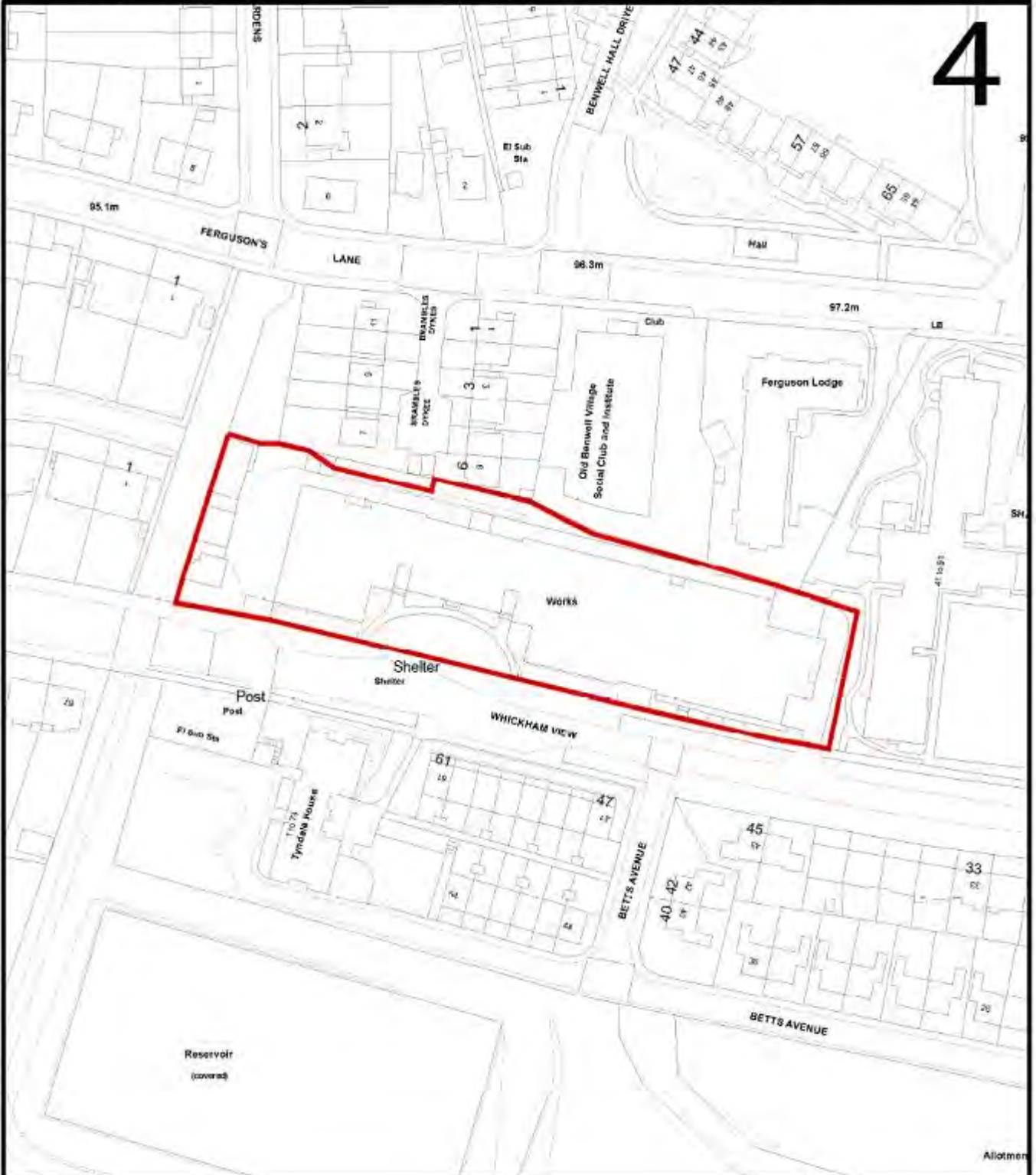
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
B1	BizSpace				
B2	Interkool North				
D2	Prince's Trust	D2	Safety Works		
V	Void (x6)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	D2	SG	Vacant
10%(1)	10%(1)								20%(2)		60%(6)

4



Address : Whickham View	Area (Ha) : 0.6	Map : NZ 2064 SE
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Scale : 1:1,250 @ A4	Date of Publication: 31/03/2010	© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009. Drawn By: J McLaughlin

Ref: ED3.1 (40)	Site Name: Former Colliery Buildings Havannah	Area: 2.6ha
Description: Single user use rural site within the Green Belt; close proximity to Hazelrigg.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Single user site in good condition with a secure entrance.	Good 4
2) Levels of occupancy	Fully occupied.	Excellent 5
3) Accessibility, servicing & circulation	Good access, servicing and circulation.	Good 4
4) Constraining land uses	Located within Green Belt, open space, SNCI and nature reserve. Sits on Airport flight path.	Poor 1
5) Access to the strategic road network	Close proximity to the A1.	Excellent 5
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	36,000+ economically active people within 30 minutes of site by public transport.	Below Average: Accessibility Grade D (2)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	2
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site does not lie within a Regeneration Growth Area.	3
10) Environmental constraints	Green Belt. Adjacent to, on all sides but to the north, allocated open space, an SNCI and a Local Nature Reserve.	4
Other considerations: Subject to saved UDP policy GB2.4. (2)		
Redevelopment/improvement potential: Special circumstances have been demonstrated to allow this development in the Green Belt, however if the existing user moves on it is desirable to return the site back to its natural state. (2)		
Conclusion: De-allocate.		

TOTAL SCORE | 36

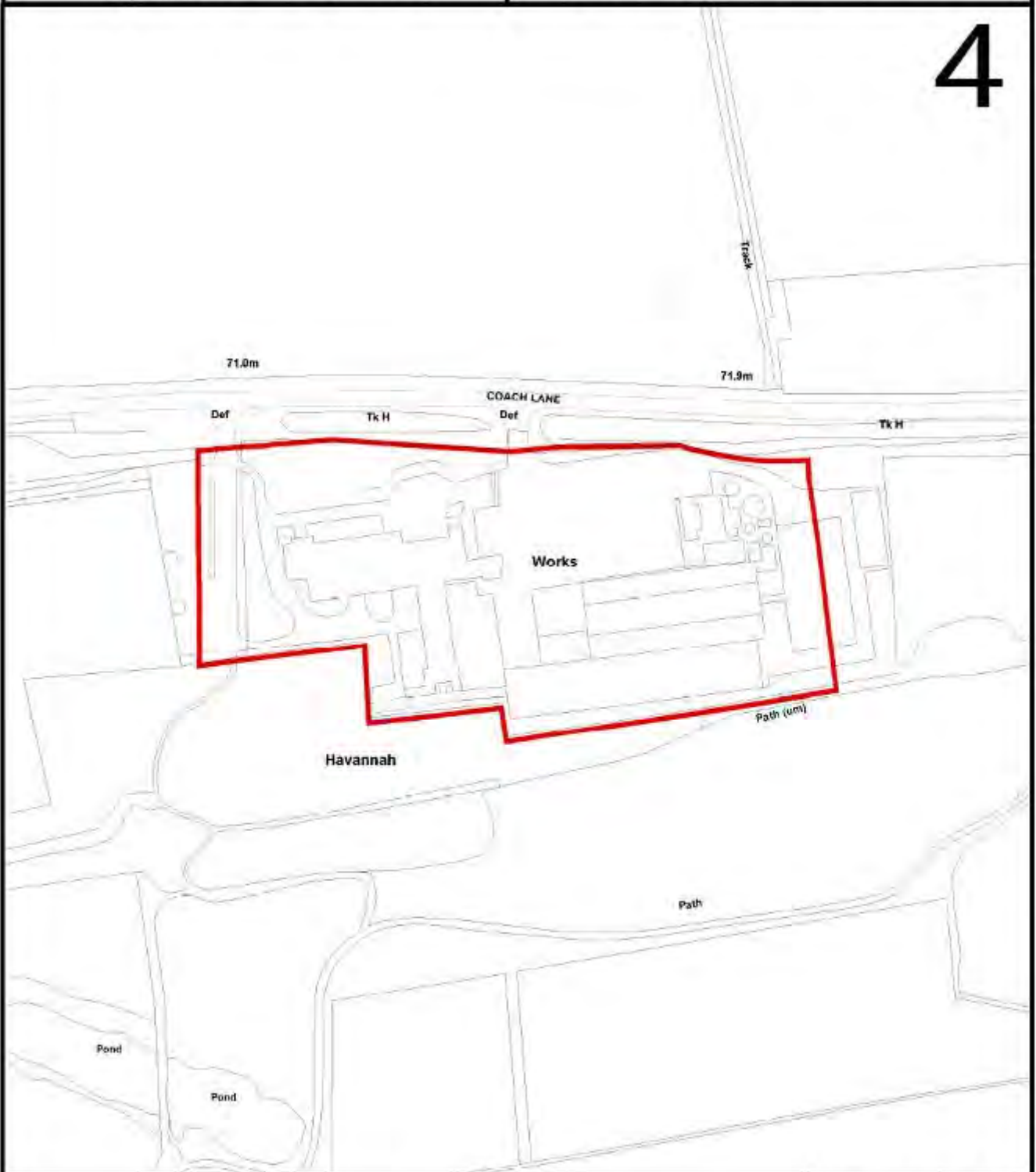
(Scoring: 5 = best, 1 = worst)

Use	Business
B2	Springvale EPS Limited

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C3	D1	D2	SG	Vacant
	100% (1)										

4



<p>Address : Former Colliery Buildings Havannah</p>	<p>Area (Ha) : 2.6</p>	<p>Map : NZ 2171 NE</p>
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<p>Scale : 1:2,000 @ A4</p>	<p>Date of Publication: 31/03/2010</p>	<p>© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009. Drawn By: J McLaughlin</p>

Ref: ED3.1 (41)	Site Name: Prestwick Industrial Estate	Area: 2.0ha
Description: Small estate on the edge of Newcastle's northern boundary with a few small buildings, a hotel and a large car park for the airport.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern hotel with airport car parking to the rear.	Good 4
2) Levels of occupancy	Fully occupied.	Excellent 5
3) Accessibility, servicing & circulation	Easy access, servicing and circulation.	Average 3
4) Constraining land uses	Adjacent to terrace of residential properties on the east and open space to the north.	Average 3
5) Access to the strategic road network	Readily accessed from the A696 which links directly into A1.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	69,000+ economically active people within 30 minutes of site by public transport.	Average: Accessibility Grade C (3)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3
10) Environmental constraints	Open space, adjacent to Green Belt.	4
Other considerations: The site although protected for industrial uses is being used exclusively for airport related uses. (3)		
Redevelopment/improvement potential: Ongoing, improvement as part of the Airport Masterplan. (3)		
Conclusions: Re-allocate for airport related uses .		

TOTAL SCORE 39

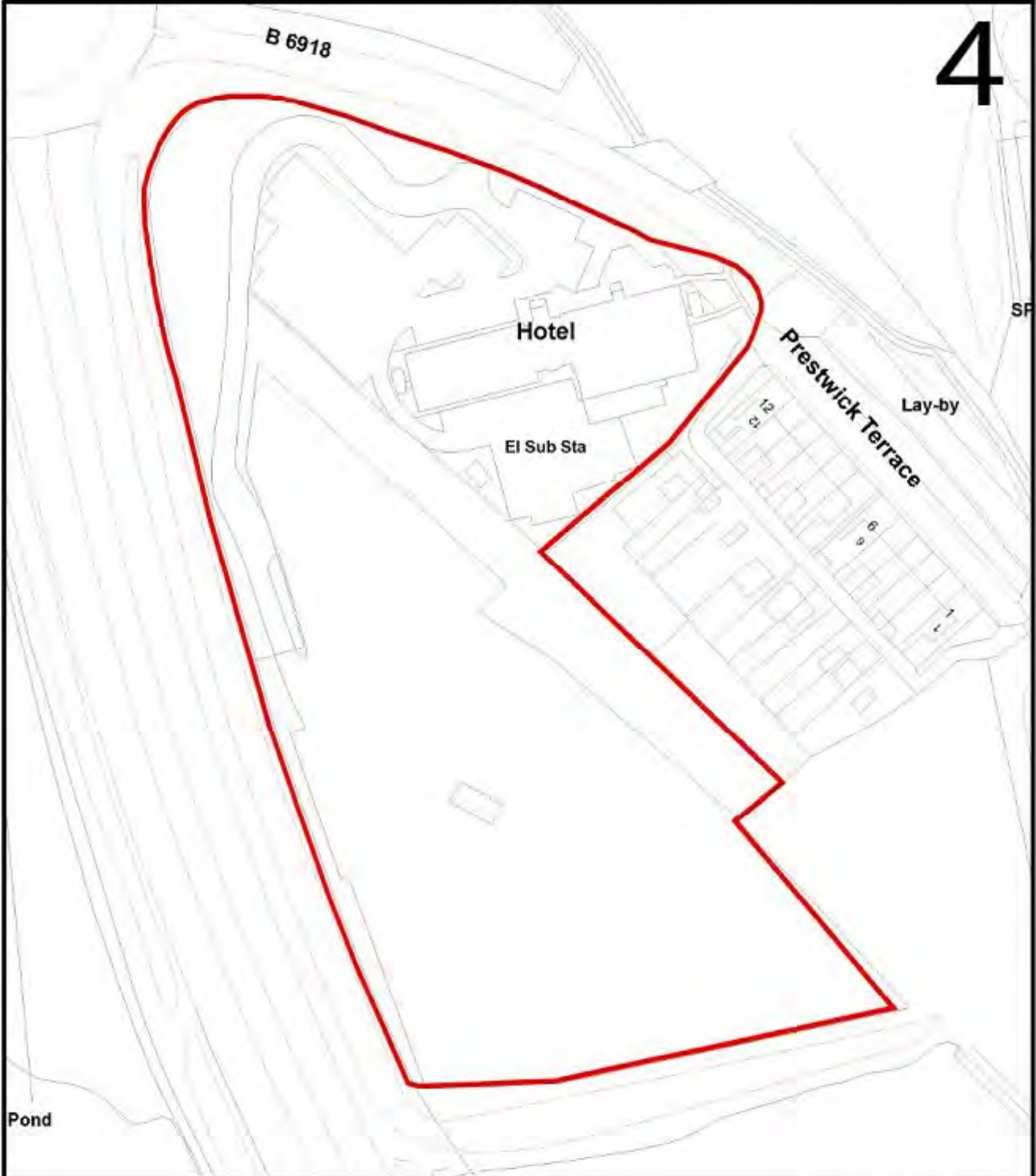
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A3	Slice	C1	Newcastle Airport Premier Inn	SG	Newcastle Park And Fly Ltd

Use Class Proportions

B1	B2	B8	A1	A2	A3	AS	C1	C3	D1	D2	SG	Vacant
					33%(1)		33%(1)				33%(1)	

4



Address : Prestwick Industrial Estate

Area (Ha) : 2.0

Map : NZ 1871 SW/SE

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Drawn By:
J McLaughlin

Ref: ED3.2 (1)	Site Name: Barrack Road	Area: 6.7ha
Description: Popular, modern high quality business accommodation with excellent access to A167M.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern business accommodation with a mix of large car retail buildings, warehouses and smaller office space. Well maintained site.	Excellent 5
2) Levels of occupancy	No vacancies recorded. Limited B1 occupancy.	Excellent 5
3) Accessibility, servicing & circulation	Excellent accessibility for all forms of vehicles. Service to site is very good with allocated parking, cycle paths and bus routes. Site is in close proximity to the city centre.	Excellent 5
4) Constraining land uses	Surrounding area, primarily mixed use - including Newcastle University and Territorial Army base.	Good 3
5) Access to the strategic road network	Access to A1 is via the A189 and the A167.	Good 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 150,000 economically active people aged 16 – 74 within 30 minutes of Barrack Road by public transport.	Accessibility Grade: A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3
10) Environmental constraints	Adjacent to a wildlife corridor, historic parks and gardens. Wall bordering Fenham Barracks on site is a Grade II* listed building. Leazes Parade Student Accommodation is also a Listed Building adjacent to the site.	2
Other considerations: The majority of the site is occupied by the BBC and Lloyd car showroom. (2)		

Redevelopment/improvement potential: The site is popular and accessible but doesn't function as it was intended to. Office developments should be concentrated in the Urban Core. (2)

Conclusions: Although the site is allocated under Policy ED3.2 for B1 business uses - B2, B8 and sui generis uses are present. The site should be de-allocated, but is anticipated to remain in employment uses over the plan period but without protection. The site should be redeveloped in a comprehensive manner.

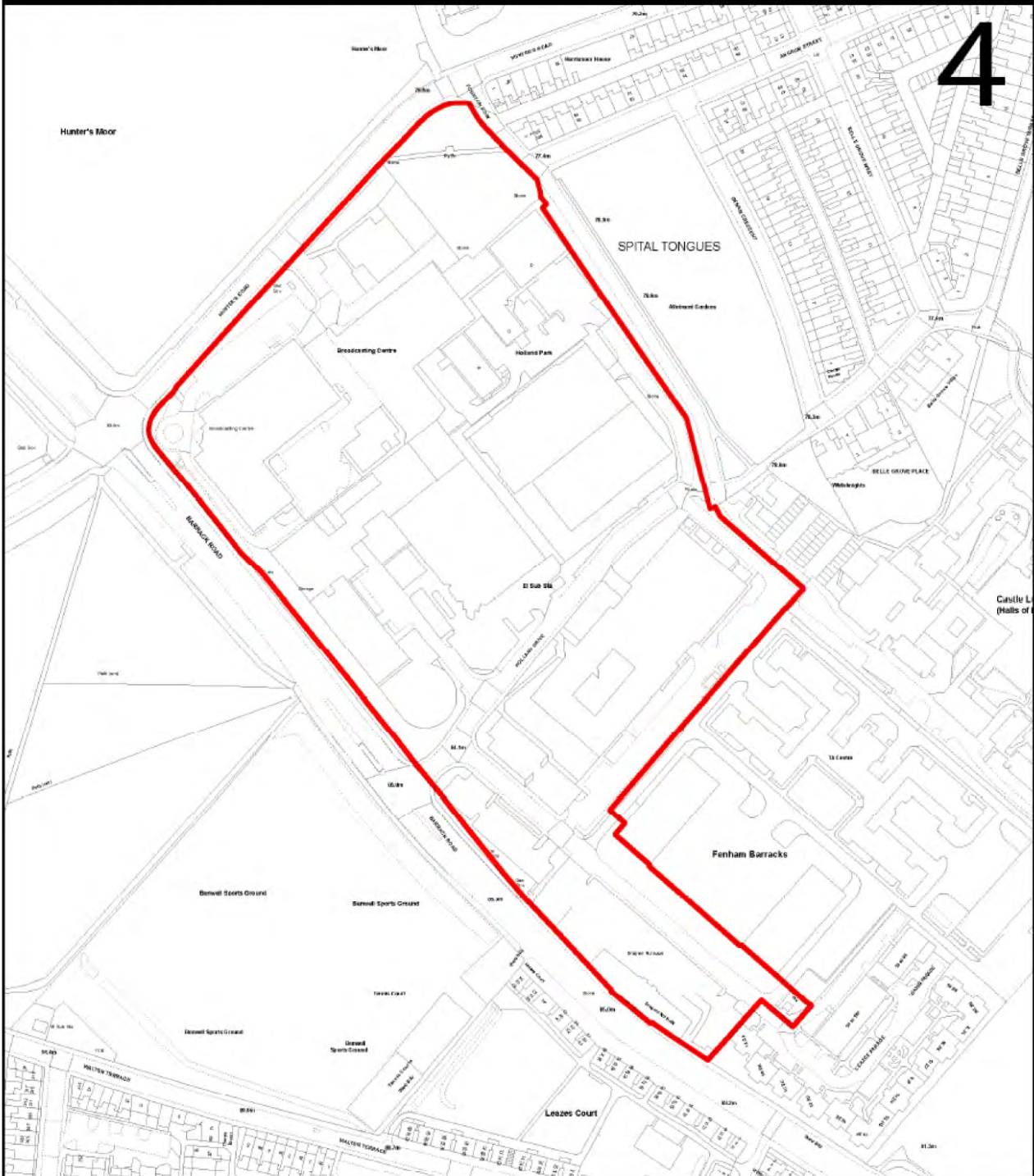
TOTAL SCORE | 39

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	NPA Car Parts				
A3	Dragon J Chinese Restaurant				
B1	Hanro Ltd.	B1	E-Therapeutics Ltd	B1	BBC North East And Cumbria
B1	BBC Radio Newcastle	B1	Russell Jones & Walker Solicitors	B1	NPA Car Parts
B8	Crown Decorators Centre				
D1	Blood Transfusion Centre				
SG	Northumbrian Universities Officer Training Corps	SG	Lloyd Mini	SG	Lloyd BMW
SG	Lloyd Body Shop				

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	D2	SG	Vacant
43% (6)		7% (1)	7% (1)	7%(1)		7%(1)		29%(4)	



Address : Barrack Road

Area (Ha) : 6.7

Map : NZ 2365 SW SE
NZ 2364 NW NE

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Scale : 1:2,500 @ A4

Date of Publication: 20/05/2010

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Drawn By: J McLaughlin

Ref: ED3.2 (2)	Site Name: Central Business Park (Manors)	Area: 2.4ha
Description: Popular, modern high quality business accommodation with excellent access to A167M.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern, well maintained, multiple storey business accommodation.	Excellent 5
2) Levels of occupancy	1 vacancy in Newcastle Technopole building.	Good 4
3) Accessibility, servicing & circulation	No problems encountered on site regarding layout, servicing and internal circulation with the allocation. Allocated parking in operation is made secure by a barrier. The site is located within the city centre, making easy access for pedestrians. This is complemented by Manors Metro station which is on site and walking distance to Central Station.	Excellent 5
4) Constraining land uses	Not close to housing or other vulnerable uses.	Excellent 5
5) Access to the strategic road network	Excellent access to the A167M	Excellent 5
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 230,000 economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Accessibility Grade A: Good 5
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3
10) Environmental constraints	No environmental constraints.	5
Other considerations: Proximity to the University. (4)		

Redevelopment/improvement potential: Linkages to Northumbria City Campus East should be fostered as part of the City Centre Action Plan. (4)

Conclusions: A good quality existing employment area which is not used as a Technology Park as was intended as such the site should be de-allocated. The site could be comprehensively redeveloped to encourage linkages with Northumbria East Campus and East Pilgrim Street

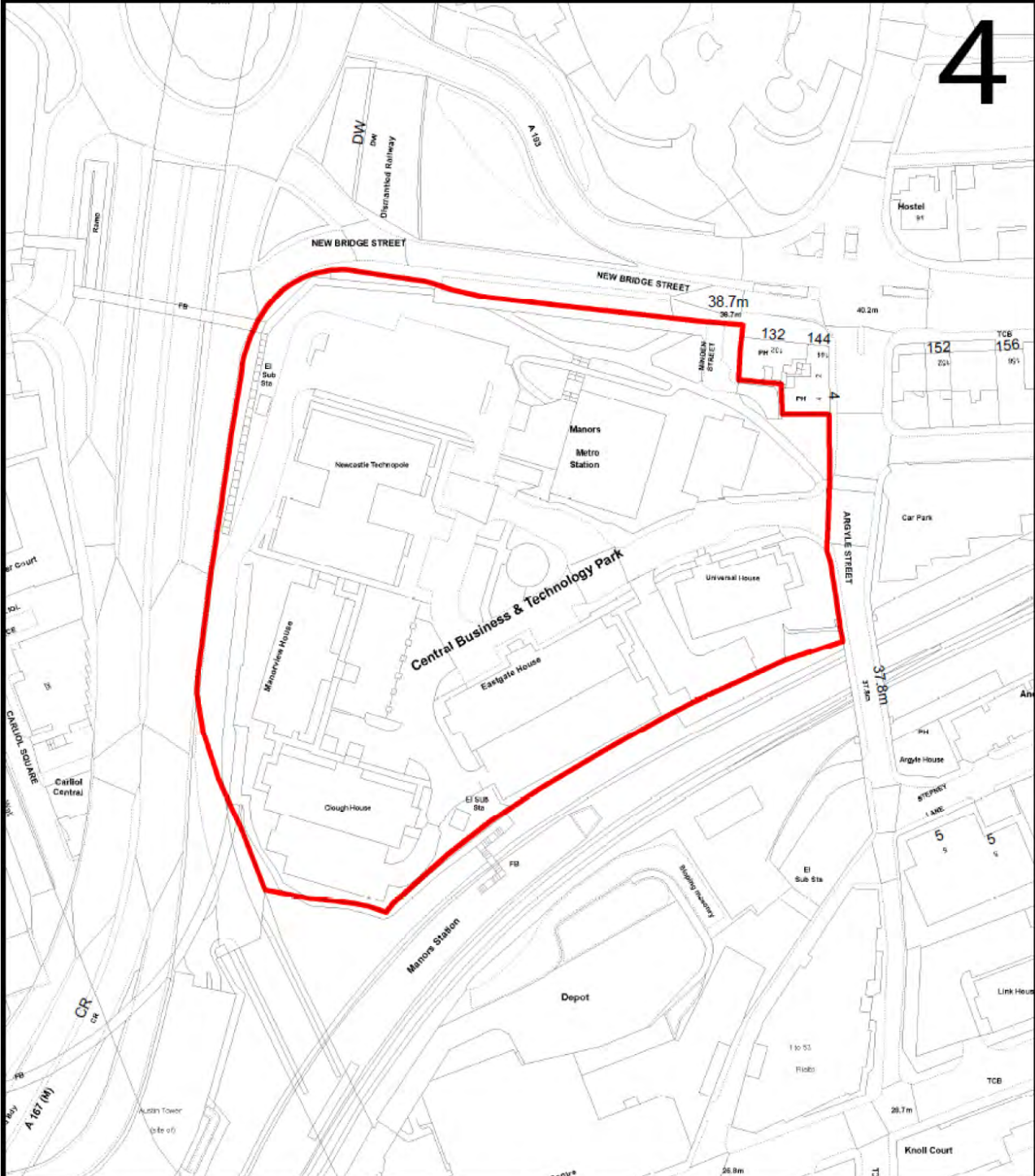
TOTAL SCORE 49

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A4	The New Bridge	A4	Kings Manor		
A2	Action for Employment				
B1	Labour Party Head Office	B1	Labour Party Regional Office	B1	Lloyds Banking Group
B1	Orchard Information Systems Ltd	B1	Perfect Image	B1	Driving Standards Agency
SG	Independent Tribunal Services				
V	Void (x1)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A4	C3	D1	D2	SG	Vacant
55% (6)				9% (1)		18% (2)				9% (1)	9%(1)



Address : Central Business Park

Area (Ha) : 2.4

Map : NZ 2564 SW

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Date of
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Drawn By:
J McLaughlin

Ref: ED3.2 (3)	Site Name: Demark Street / Heaton Street	Area: 2.5ha
Description: Purpose built light industrial accommodation.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Site has a mixture of buildings ranging from small workshop units through to traditional high street office space. Many units have rear access that is being used as a workshop or storage.	Good 4
2) Levels of occupancy	Some voids being marketed through Property Services.	Average 3
3) Accessibility, servicing & circulation	Access to site is from congested roads such as Shields Road. On site servicing and circulation is average - site roads are narrow with some deterioration of roads and allocated parking. Site is close to Byker Metro station.	Average 3
4) Constraining land uses	Site is surrounded by dense residential.	Fair 2
5) Access to the strategic road network	Reasonably close to Central Motorway which links into A1.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 180,000+ economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Good: Grade A (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Regeneration Growth Area.	3
10) Environmental constraints	Abuts wildlife corridor.	3
Other considerations: Denmark Street Industrial Estate was removed from the allocated ED3.2 area with UDP modifications. (1)		
Redevelopment/improvement potential: Potential for redevelopment in the wider context of the Fossway Development Area (2).		

Conclusions:
De-allocate

TOTAL SCORE 38

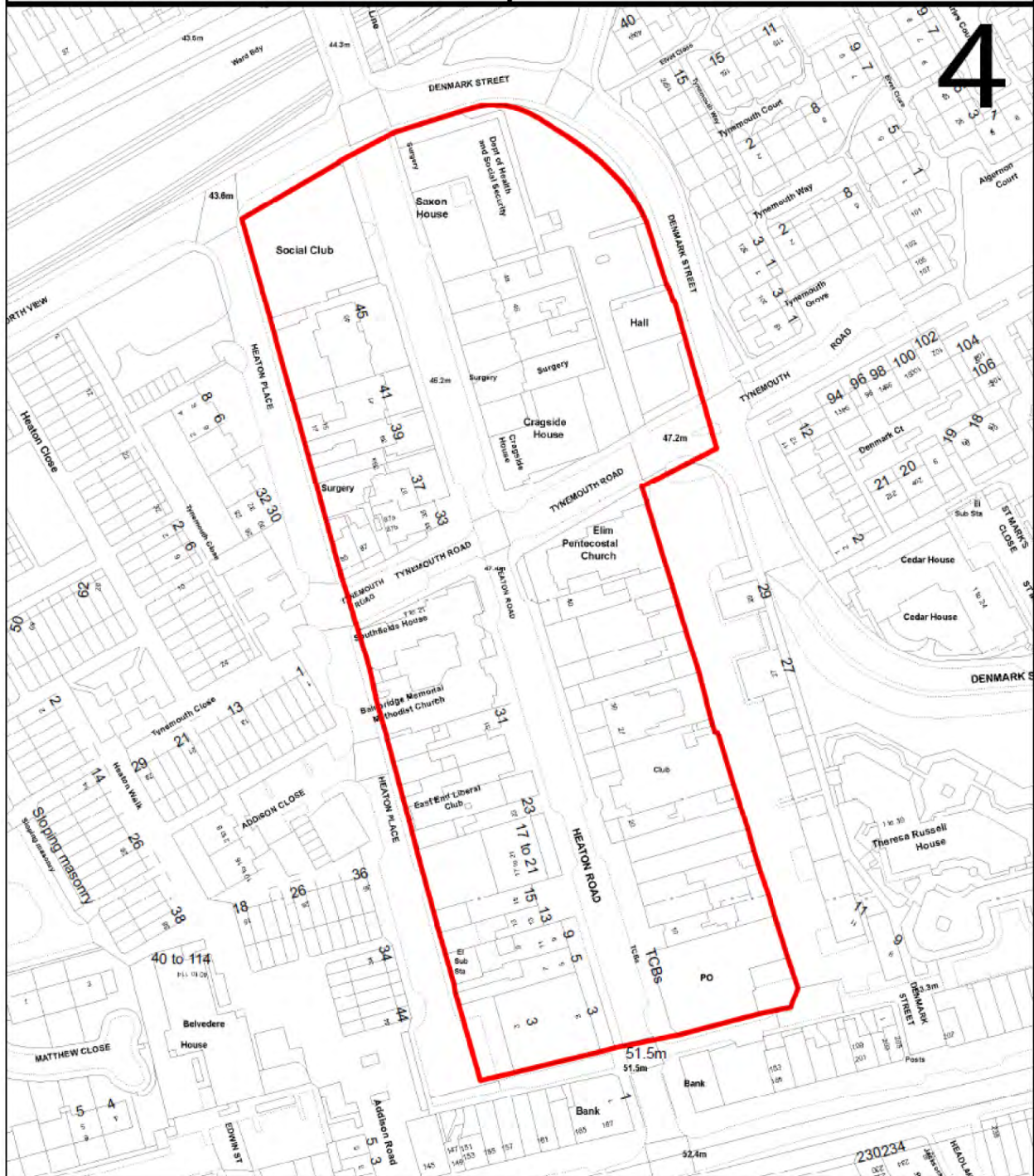
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Saxon Pharmacy	A1	Joe's Fish Net	A1	Prestige Beds
A1	BK Barbers	A1	Timeless Bodyart	A1	Expert Ease
A1	Kerr Chemist				
A2	Swinton Insurance	A2	Capability's	A2	Eastend Community Health Project
A2	Newcastle City Council Social Services Area Office	A2	Robson Electrical Ltd	A2	Arena Nagel Clark
A3	Bella Italia	A3	JJ's Cafe		
A4	Newcastle RAOB Club And Institute				
A5	VIP Chinese Cuisine Express	A5	Heaton Balti House		
B1	Access	B1	Ingles & Donnelly	B1	G.Richardson
B1	Jaime's Ministry of Food North East	B1	ISOS	B1	LA Taxi
B1	On Hire Ltd				
B2	Metric Group	B2	Cake Designs	B2	Sign Trade Signmakers
B8	Delhi Catering				
D1	Heaton Road Dental Practice	D1	Newcastle Primary Care Trust – Occupational Health & Hygiene	D1	Strachan Tyson & Hamilton
D1	Heaton Medical Centre	D1	Heaton Road Medical Centre	D1	Elim Pentecostal Church
D1	North East Clinic	D1	Arc Youth & Community Building	D1	Denti Centre
D2	The Heaton – Bingo				
SG	Royal Mail	SG	JMS Auto Centre	SG	Car Colours North East
SG	Benton Auto Electrics	SG	G.Tully Car Repair	SG	North East Service Centre
SG	A14 W.A.E Auto Electrics	V	Voids (x15)		

Use Class Proportions

B1	B2	B8	A1	A2	A3	A4	A5	D1	D2	SG	Vacant
11%	5%	2%	11%	10%	3%	2%	3%	14%	2%	11%	24%
(7)	(3)	(1)	(7)	(6)	(2)	(1)	(2)	(9)	(1)	(7)	(15)

4



Address : Denmark Street/Heaton Road

Area (Ha) : 2.5

Map : NZ 2665 SE
NZ 2765 SW
NZ 2664 NE
NZ 2764 NW

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Drawn By:
J McLaughlin

Ref: ED3.2 (4)	Site Name: Kenton Bar	Area: 7.3ha
Description: Closed. Redeveloped for housing by Wimpey Homes.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	N/A	N/A
2) Levels of occupancy	N/A	N/A
3) Accessibility, servicing & circulation	N/A	N/A
4) Constraining land uses	N/A	N/A
5) Access to the strategic road network	N/A	N/A
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	N/A	N/A
7) Social development	N/A	N/A
8) Jobs/workforce ratio	N/A	N/A
9) Regeneration policy	N/A	N/A
10) Environmental constraints	N/A	N/A
Other considerations: N/A		
Redevelopment/improvement potential: N/A		
Conclusions: Redeveloped for housing - de-allocate.		

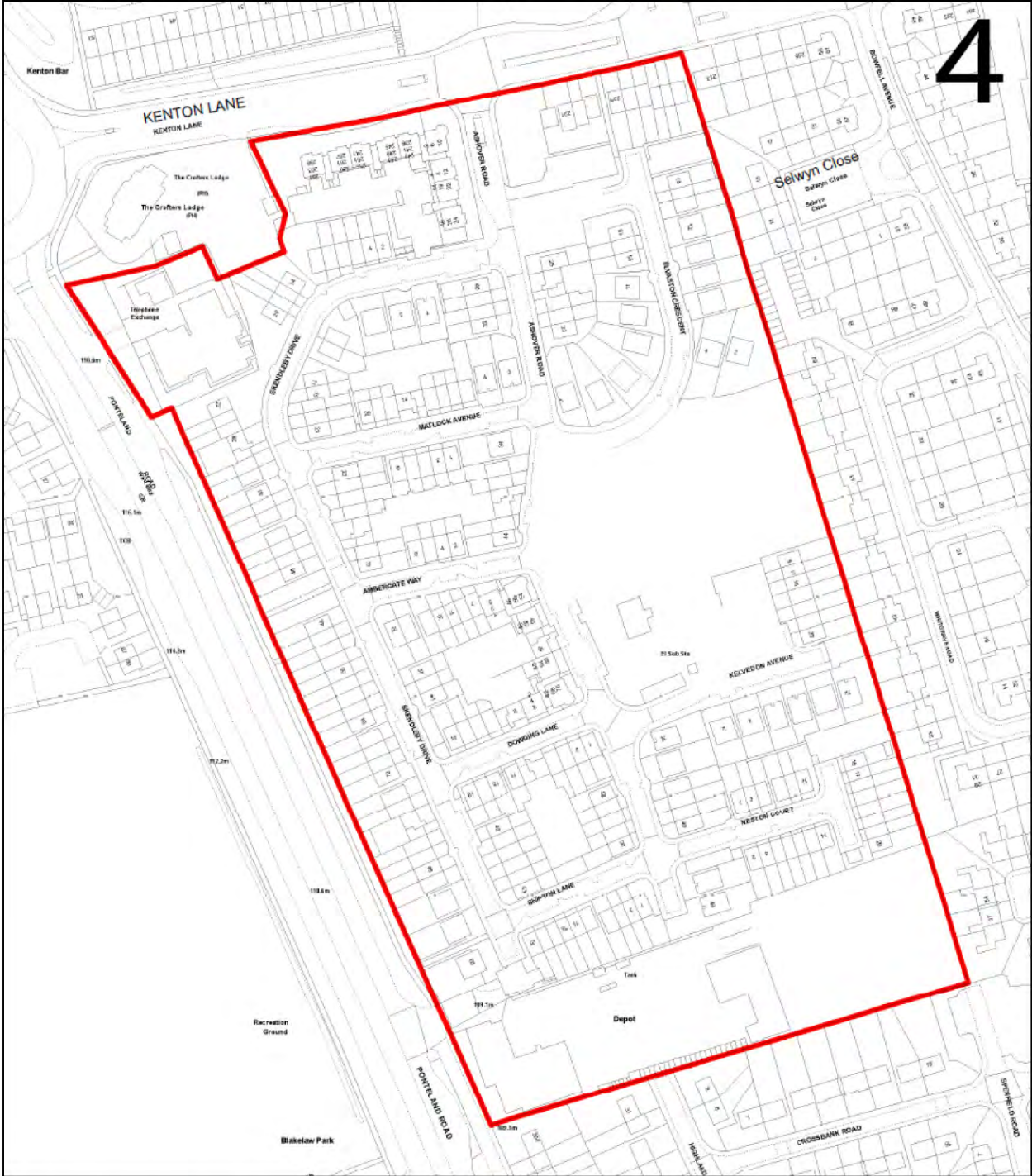
TOTAL SCORE | N/A
(Scoring: 5 = best, 1 = worst)

Use	Business
C3	'The Grange' a development by Wimpey Homes. .

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	D2	SG	Vacant
					100%				

4



Address : Kenton Bar		Area (Ha) : 7.3	Map : NZ 2167
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Scale : 1:1,921 @ A4	Date of Publication: 20/05/2010	© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009.	Drawn By: J McLaughlin

Ref: ED3.2 (5)	Site Name: Longbenton DSS	Area: 23.9ha
Description: 78,000 sq.m of HQ style modern high quality business accommodation, occupied by the Public Sector.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern, high quality business accommodation	Excellent 5
2) Levels of occupancy	Single occupancy site.	Excellent 5
3) Accessibility, servicing & circulation	Good, built with end user in mind.	Excellent 5
4) Constraining land uses	Residential fronting south side of Benton Park View. Site sandwiched between a school and two housing developments.	Average 3
5) Access to the strategic road network	Good access to Benton Park Road and reasonably close proximity to the A19 and A1. An issue within this area is congested roads.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 147,000 economically active people aged 16 – 74 within 30 minutes of Benton Road by public transport.	Grade A: 5
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 / 0.2 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	Not within a Regeneration Growth Area.	2
10) Environmental constraints	Open space to the eastern and western boundary.	2
Other considerations: Large floorplate, HQ style. (4)		
Redevelopment/improvement potential: Well performing site, albeit out with the urban core. (3)		
Conclusions: De-allocate. Office use should be cantered in the urban core. Remainder of the allocation could come forward for housing.		

TOTAL SCORE	42
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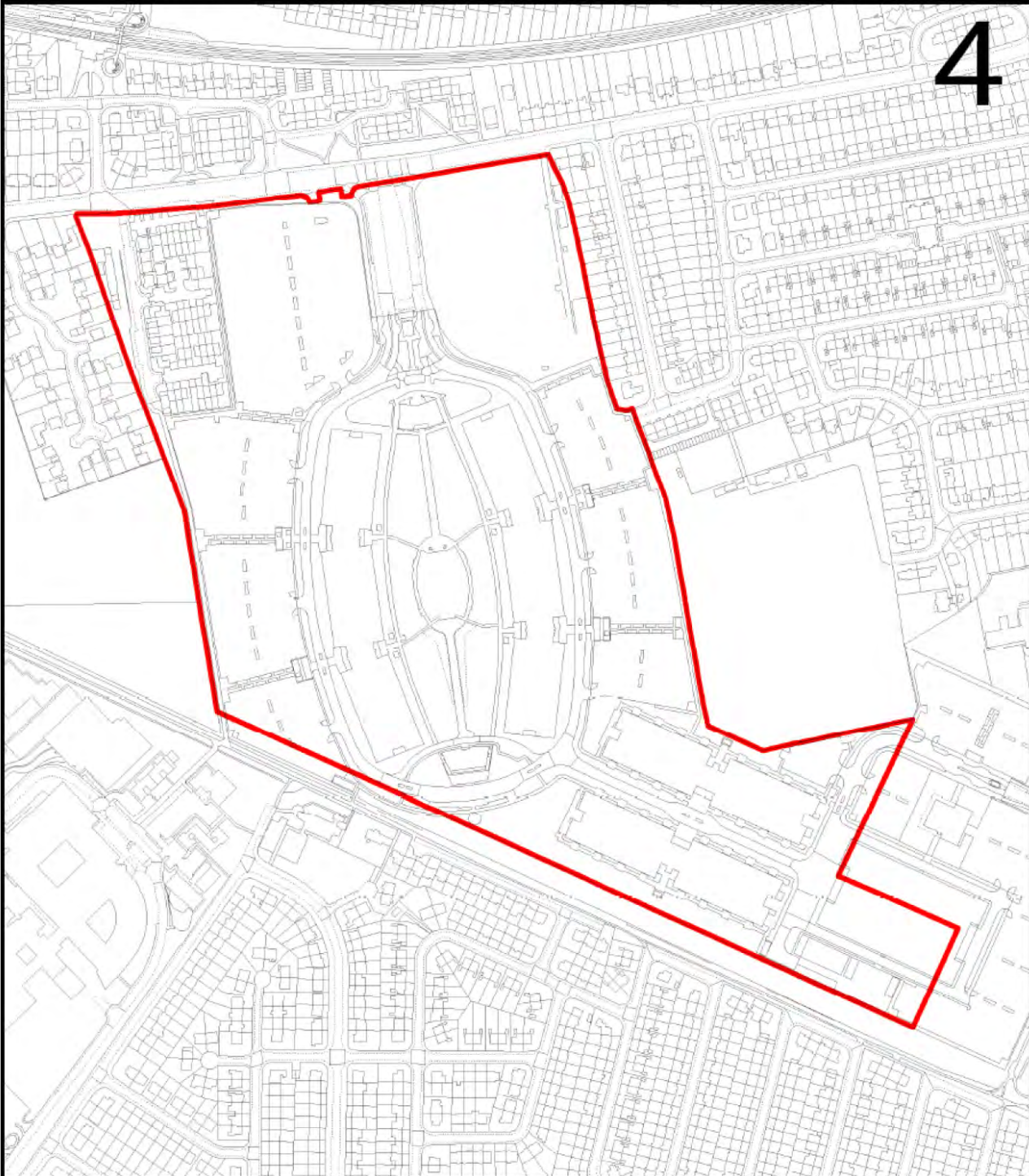
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
B1	Interserve Facilities Management	B1	Department For Works And Pensions
B1	HMRC	D1	Stepping Stones Nursery
B1	Child Support Agency		

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	Vacant
80%(4)						20%(1)	

4



Address : Longbenton DSS

Area (Ha) : 23.9

Map : NZ 2668 SW SE
NZ 2667 NW NE

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Drawn By:
J McLaughlin

Ref: ED3.2 (6) Millers Hill	Site Name: Millers Hill	Area: 0.8ha
Description: Small site consisting of 5 connected units. Similar uses lie along the east side of Shields Road and St Marks Street.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Reasonably modern accommodation in average condition. Site is visibly well maintained.	Average 3
2) Levels of occupancy	No voids, but not in B uses.	Fair 2
3) Accessibility, servicing & circulation	Access is good, but servicing and circulation is average.	Average 3
4) Constraining land uses	Residential uses lie to the north and west.	Average 3
5) Access to the strategic road network	Reasonably close to the Central Motorway.	Average 3
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 160,000 economically active people aged 16 – 74 within 30 minutes of Barrack Road by public transport.	Grade A: Good (5)
7) Social development	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is imbalance of jobs and economically active in the area.	4
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5
10) Environmental constraints	None applicable	3
Other considerations: (0)		
Redevelopment/improvement potential: The site abuts the Fossway ED3.1 allocation. The Council's Urban Design Team are preparing a strategic framework for the Fossway Development Area. This involves looking at the development blocks on the IRDL and the two Siemens sites, links between them, and to the surrounding area. Improvements to the highway network are crucial to this process. (2)		

Conclusions:

The site is allocated for B1 business use but none of the occupiers operating out of the site are B1 business uses, indicating a lack of demand in the area.

De-allocate

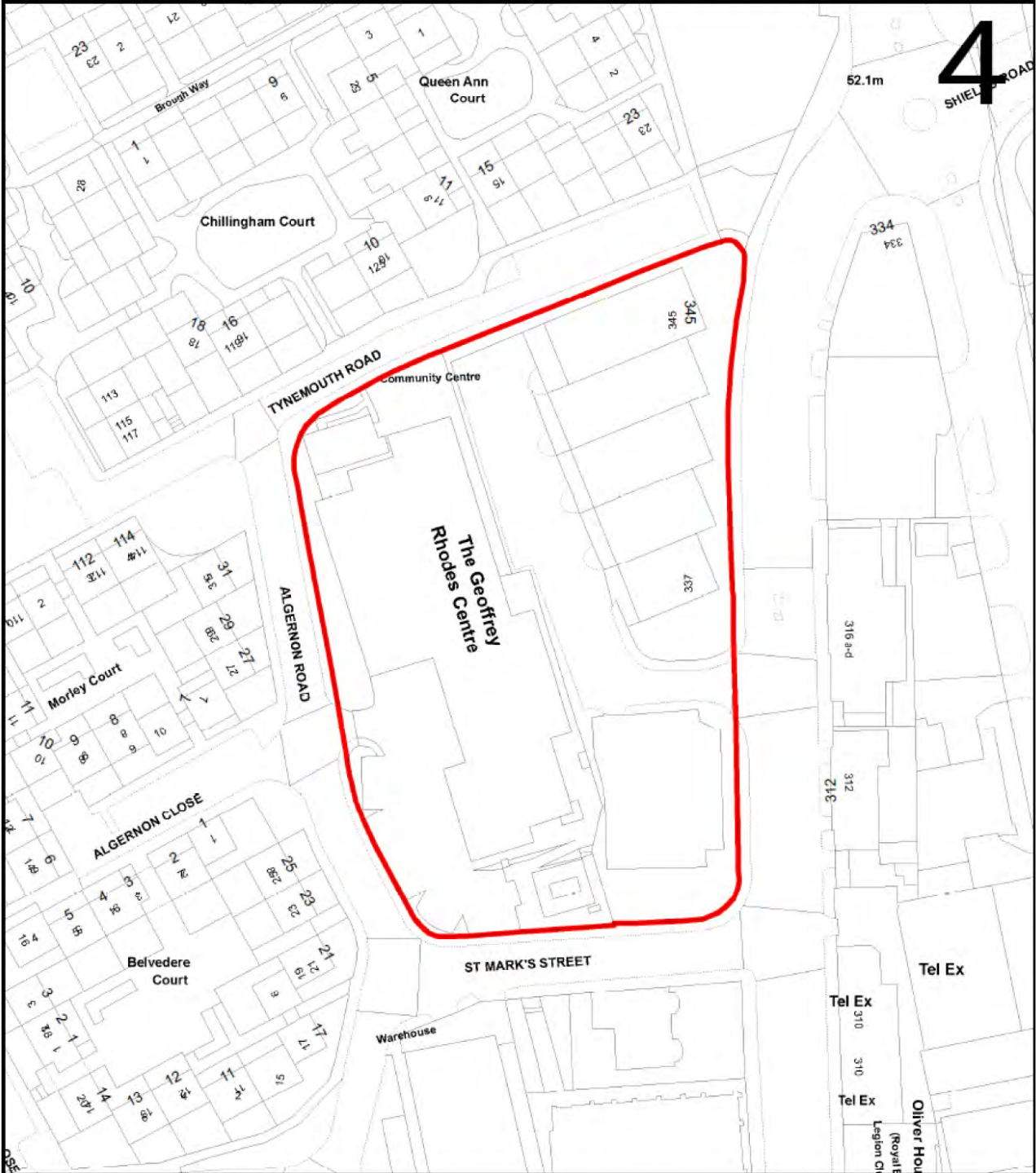
TOTAL SCORE	38
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(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
D1	Newcastle Upon Tyne Hospitals NHS Trust	SG	Lord Hire Centres
A1	Dickinson Shoe Services	D2	Charles Street Tenants Association

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	D2	SG	Vacant
			25%(1)			25%(1)	25%(1)	25%(1)	



Address : Millers Hill, Shields Road

Area (Ha) : 0.8

Map : NZ 2765 SW

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Drawn By:
J McLaughlin

Ref: ED3.2 (7)	Site Name: Newcastle Business Park	Area: 23.3ha
Description: High quality landscaped office development.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Attractive units in landscaped surroundings, which are available in a variety of sizes and styles.	Excellent 5
2) Levels of occupancy	Regional headquarters of national occupiers, notably British Airways, AA and the Environment Agency. Majority of voids found within the smaller units, studios and multi occupancy offices on site.	Good 4
3) Accessibility, servicing & circulation	Good accessibility via Scotswood Road. The layout of the site is good, with access being provided for larger vehicles. The site has a considerable amount of allocated parking but this is insufficient - which is leading to on street parking. Site is serviced by bus routes. The site is also serviced by pedestrian walkways and cycle routes.	Good 4
4) Constraining land uses	Site is constrained by river to the north and road network to the south.	Fair 2
5) Access to the strategic road network	The improvements and enlargement to Scotswood Road have improved access to the city centre and the route to the A1.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 165,000 economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Grade A: 5
7) Social development	Site is within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	5
8) Jobs/workforce ratio	0.4 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is located within a Regeneration Growth Area.	5
10) Environmental constraints	Wildlife corridor abuts northern boundary.	3
Other considerations: Adjacent to Scotswood Road Industrial Estate and includes Armstrong Road Industrial Estate. (3)		

Redevelopment/improvement potential: The site should be retained for employment / economic development use. (3)
Conclusions: Retain

TOTAL SCORE 45

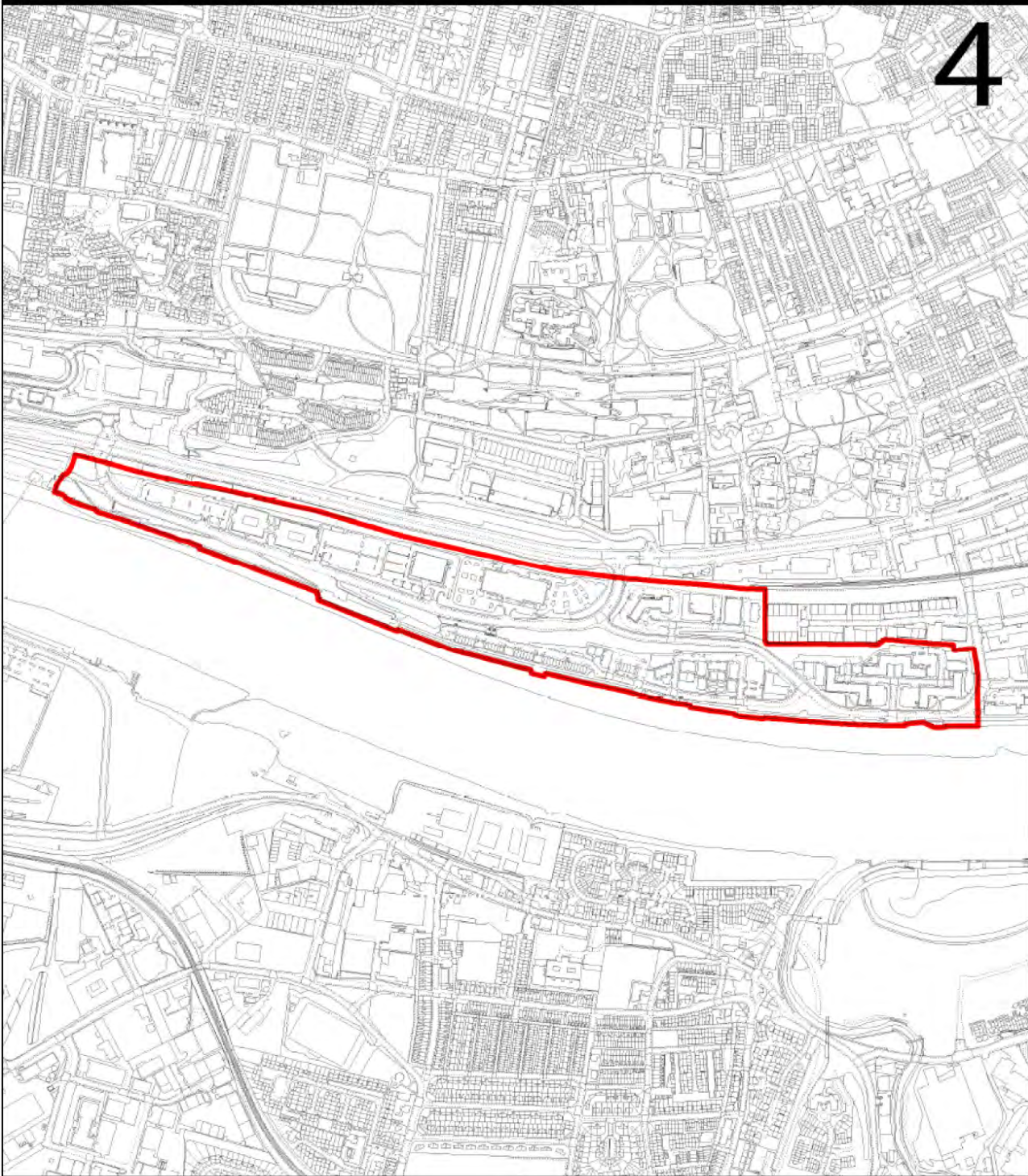
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Riverside News				
A2	Driver Hire				
A3	The Delhi				
B1	British Airways	B1	Parsons Brinkerhoff	B1	AA
B1	Surgo	B1	Faithful Gould	B1	Atkins
B1	Clothier Lacey &Co	B1	CIS Insurance	B1	Cameron Builders (Newcastle) Ltd
B1	Blumilk	B1	Rural Payments Agency	B1	Nova International
B1	Your Move	B1	Eliesha Training	B1	Eventcover Productions
B1	RH Freight Services Ltd.	B1	Arcus Consulting	B1	Right Hand HR
B1	Telereal Trillium	B1	Hindsight	B1	Babcock Training
B1	Pulse Community Healthcare	B1	Carrotmedia	B1	Pink Impression Design & Print
B1	Abode Lettings	B1	Shape Recruitment	B1	Concept
B1	Bissett Kenning & Newis – Surveyors	B1	NBPMC Security	B1	Xerox UK Ltd
B1	Argent	B1	Blue Door Projects	B1	Metlife
B1	Greenhatch Group	B1	Health Care at Home	B1	Typex
B1	Collingwood Leases	B1	Northern England Regional Office	B1	Stephenson Coates
B1	BAM Nuttall	B1	Benfield	B1	Bluebell
B1	North East Ambulance Service	B1	Fujitsu	B1	WSP
B1	Marine Management Organisation	B1	Rural Payments Agency	B1	Environment Agency
SG	Driving Standards Agency				
V	Voids (x8)				

Use Class Proportions

B1	B2	B8	A1	A2	A3	A4	C3	D1	D2	SG	Vacant
80%(48)			2% (1)	2% (1)	2% (1)					2% (1)	13%(8)

4



Address : Newcastle Business Park

Area (Ha) : 23.3

Map : NZ 2263 SW SE
NZ 2362 NW NE
NZ 2363 SW SE

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Drawn By:
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Ref: ED3.2 (8)	Site Name: Portland Road	Area: 0.8ha
Description: Modern brick built 3 storey office block fronting Portland Road with office block to the rear. The remainder of the allocation comprises mainly large Victorian houses, now in various uses with commercial interest in converting back to housing.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Two Tower blocks on site – one (Benton House) in good condition, while second (Warwick House) is unoccupied and falling into disrepair. Smaller office units (in mixed condition) are found on Portland Road.	Good 4
2) Levels of occupancy	Number of voids in the block fronting Portland Road. Tower block to the rear looks unoccupied and is being actively marketed. The NHS Foundation are the anchor tenant of this allocation.	Fair 2
3) Accessibility, servicing & circulation	Access to site is average and the smaller units benefit from allocated parking and storage facilities to the rear. Service and circulation is good but layout is not appropriate for larger vehicles. Site is close to city centre and Jesmond – this provides good pedestrian access. Site is also close to Jesmond Metro station.	Average 3
4) Constraining land uses	Site borders Conservation area along Portland Road to the west and Sandyford Road to the north. Residential to the north.	Fair 2
5) Access to the strategic road network	Good from Portland Road and easy access to Great North Road and Coast Road. Offices have allocated parking on site.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 210,000 economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is an imbalance of jobs and economically active in the area.	4

9) Regeneration policy	The site is not within a Regeneration Growth Area.	3
10) Environmental constraints	Site abuts Conservation Area.	3
Other considerations: Limited demand for second hand accommodation in this off pitch location which would be struggling without the NHS Foundation. Anticipated that other uses would be more viable. (3)		
Redevelopment/improvement potential: Potential for residential or student accommodation. (3)		
Conclusions: De-allocate		

TOTAL SCORE	38
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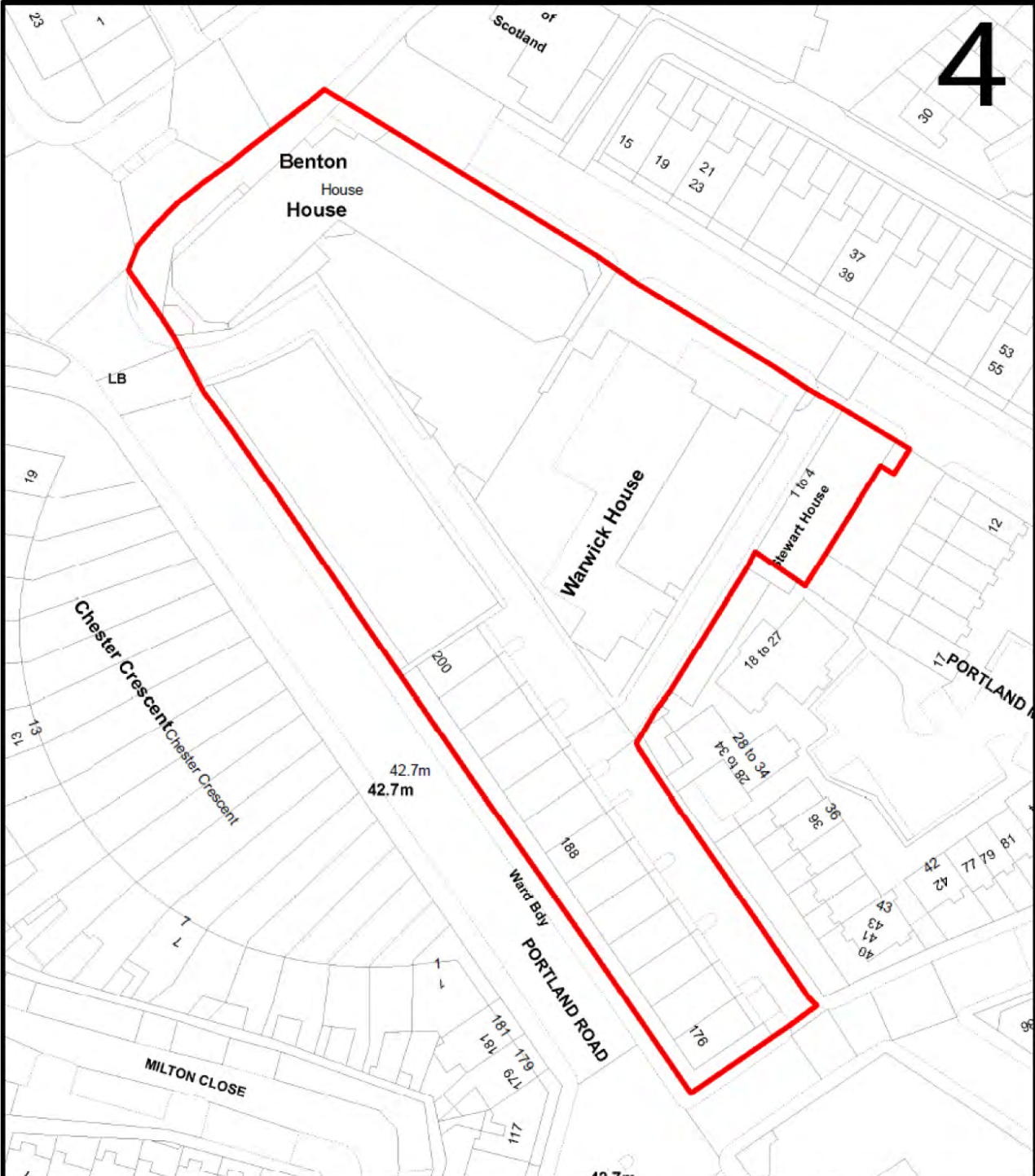
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A2	Elite Education				
B1	SEQM	B1	Admast	B1	Gill & Robinson Timber Agents
B1	NHS				
SG	LA Taxi				
V	Void (x10)				

Use Class Proportions

B1	B2	A2	A3	C1	D1	SG	Vacant
25%(4)		6%(1)				6%(1)	62%(10)

4



Address : Portland Road	Area (Ha) : 0.8	Map : NZ 2565 SE
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Ref: ED3.2 (9)	Site Name: South Jesmond (Portland Terrace)	Area: 2.0ha
Description: Two areas of mainly large Victorian houses, now in various uses, with commercial interest in conversions back to housing.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Brick built traditional Tyneside terrace that has been converted into office space – some parts of the terraces have been converted back to residential use. Majority of offices in excellent condition showing signs of recent refurbishment. There is a minority of buildings needing attention.	Average 3
2) Levels of occupancy	Overall 6 office voids and 4 residential voids.	Average 3
3) Accessibility, servicing & circulation	Good access to a site that is easy to access from the city centre. Area is in close proximity to Jesmond metro and is located on a bus route. Allocated parking to front and rear with outdoor storage area.	Average 3
4) Constraining land uses	Arriva bus depot is opposite the site, with vehicles leaving via the east side of Portland Road. Conservation Area.	Fair 2
5) Access to the strategic road network	Good from Portland Road and easy access to Great North Road and Coast Road. Offices have allocated parking on site.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 220,000 economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Grade A: 5
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2
9) Regeneration policy	The site is not located within a Regeneration Growth Area.	3
10) Environmental constraints	Site is within a Conservation area with the boundary running along Osborne Terrace and Sandyford Road.	2
Other considerations: Site is included within the SHLAA, as being suitable, available and deliverable for residential development. (2)		

Redevelopment/improvement potential:
Commercial interest in conversion back to housing. (2)
Conclusions:
De-allocate

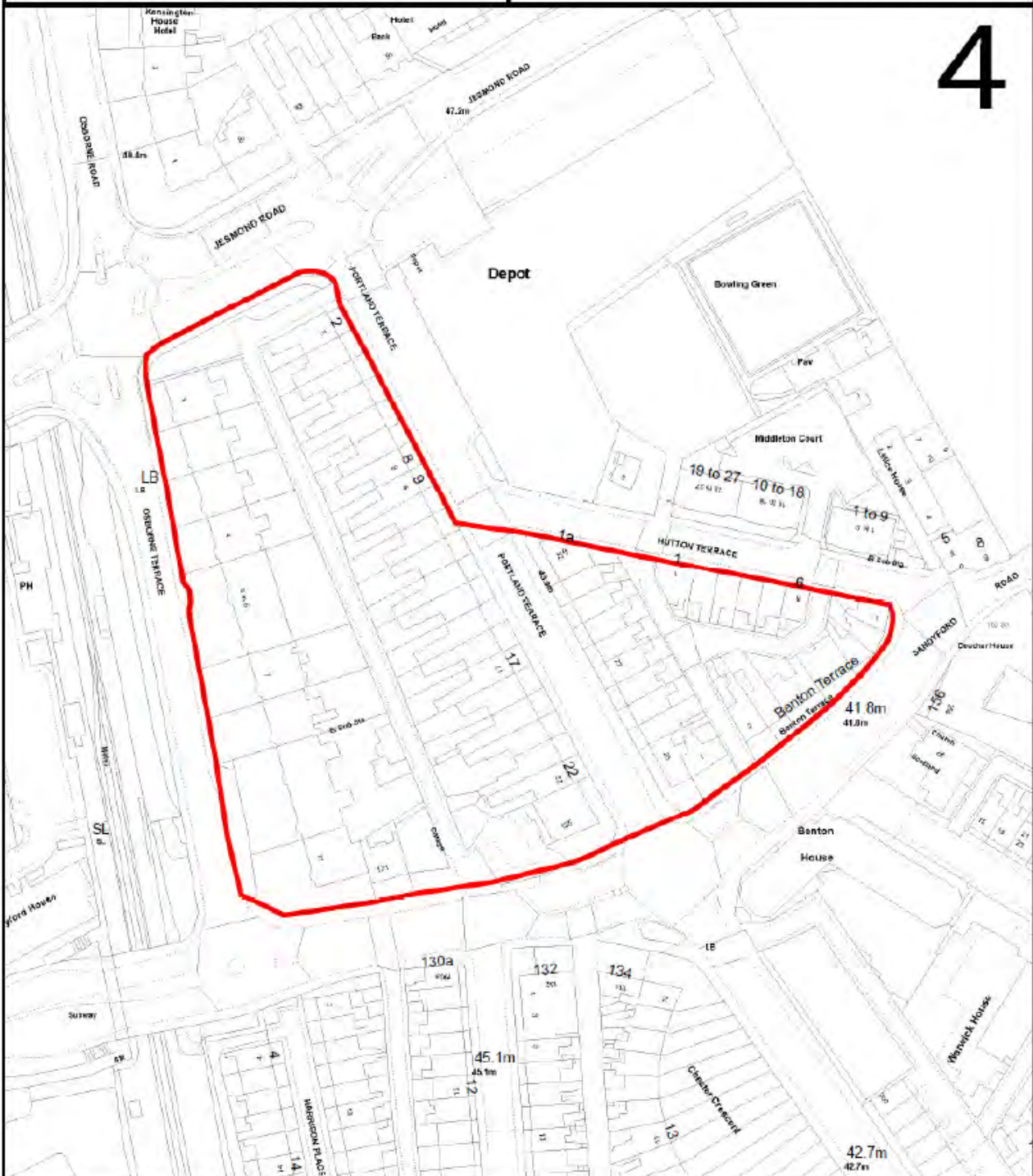
TOTAL SCORE 33

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A2	Oaks Properties Ltd.	A2	Taylorred Lets		
A3	Café Med				
B1	Robinsons Chartered Accountants	B1	Tyncan Group	B1	CTC Chartered Accountants
B1	Ryecroft Glentor	B1	Samaritans	B1	Jesmond Group
B1	Lowthian Gray	B1	Workers Educational Association	B1	McDarid & Co
B1	Brenikov Associates	B1	Mincoffs Solicitors	B1	Wall to Wall
B1	Outlook	B1	Gauntlet	B1	Razak & Co
B1	Digital Communications Systems	B1	Acritas	B1	Sendrig
B1	Aedis				
C1	Hansen Hotel				
D1	Tyneside Pregnancy Advice Centre				
SG	ESSO	SG	H.R. Fast Fit		
V	Void (5)				

Use Class Proportions

B1	B2	A2	A3	C1	D1	SG	Vacant
63%(19)		7%(2)		3%(1)	3%(1)	7%(2)	17%(5)



Address : South Jesmond (Portland Terrace)	Area (Ha) : 2.0	Map : NZ 2565 SE SW
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Scale : 1:1,500 @ A4	Date of Publication: 20/05/2010	© Crown copyright. All rights reserved Newcastle City Council, 100019569, 2009.	Drawn By: J McLaughlin
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Ref: ED3.2 (10)	Site Name: Regent Centre	Area: 6.4ha
Description: Modern refurbished and new office space		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Modern, large floor plate Grade A office accommodation designed for multi occupancy. Some of the more dated looking buildings have had extensive refurbishment work inside. Overall, this is a very well maintained site.	Excellent 5
2) Levels of occupancy	Very high level of voids with majority being advertised by King Sturge. Regent Point building is completely vacant and comprises of the following office space: 10,000 – 100,000 sq ft and 2,000 – 20,000 sq ft.	Poor 1
3) Accessibility, servicing & circulation	Good, a developed site with business occupiers in mind and supported by large car parking facilities. The layout of this site makes it easy for it to be accessed and serviced by larger vehicles. Site has an attached Metro station and is close to Gosforth High Street.	Good 4
4) Constraining land uses	Residential – issues with car parking historically. Site is further constrained by Metro line to north.	Average 3
5) Access to the strategic road network	Location of site allows for several routes to link into A1 and close proximity of Great North Road provides access to the city centre. However, this is a primary access route to and from the city centre and there are issues with congestion.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 160,000 economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Grade A (5)
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	2
8) Jobs/workforce ratio	0.1 ratio of claimants against working age population, indicating that there is a balance of jobs and economically active in the area.	2

9) Regeneration policy	The site is not within a Regeneration Growth Area.	3
10) Environmental constraints	None.	5
Other considerations: Site is close to Asda and Gosforth High Street local amenities. (4)		
Redevelopment/improvement potential: Site should be retained for B1 uses. (4)		
Conclusions: Retain		

TOTAL SCORE 42

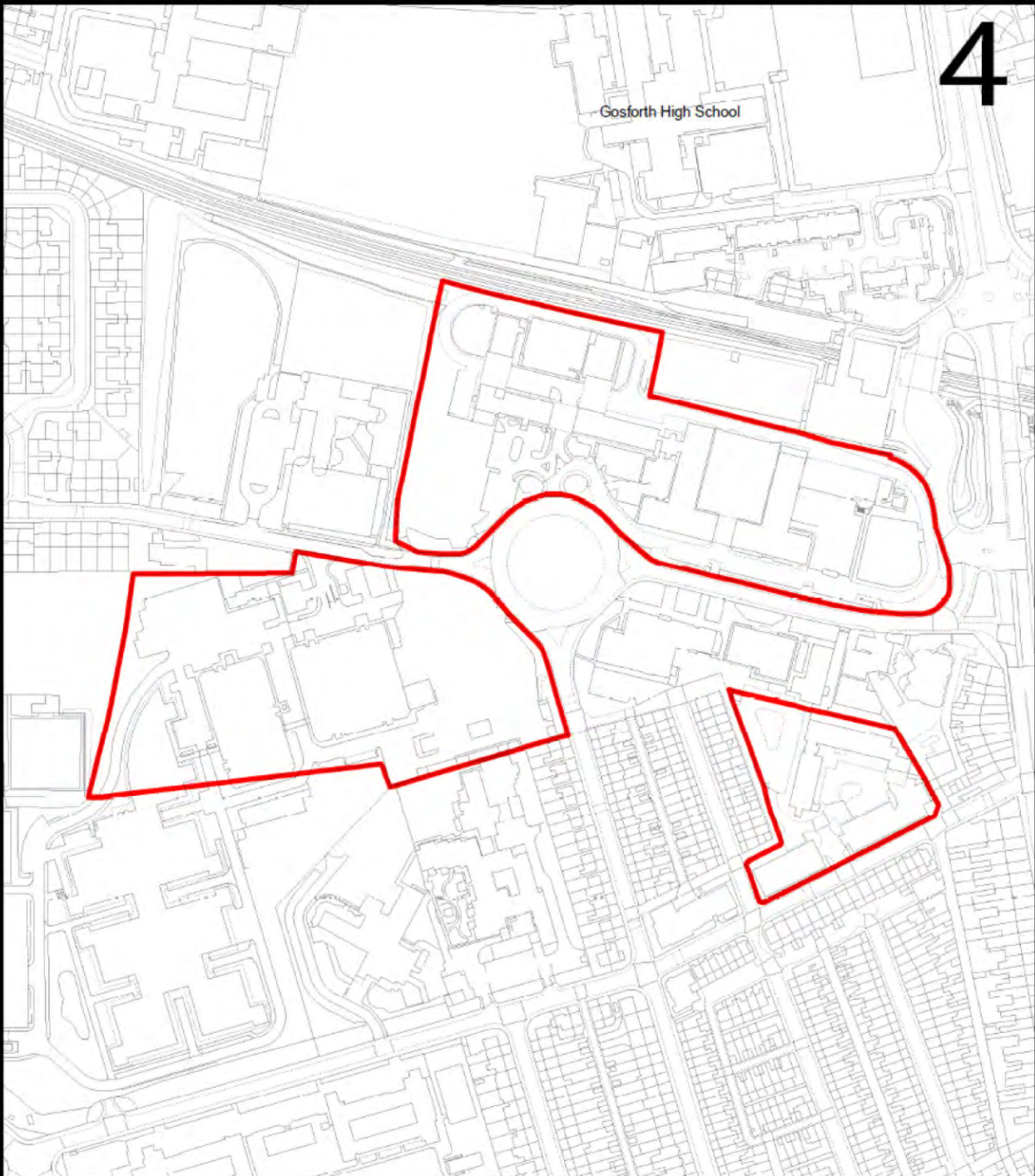
(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business	Use	Business
A1	Melissa Cosentino Hairdressing				
A2	Adderley Featherstone Plc				
A3	Eat Cetera				
B1	Virgin Money	B1	NHS	B1	Carillion
B1	UK Asset Resolution	B1	Newcastle City Council	B1	AMEC
B1	DHSS	B1	Astrium	B1	Newcastle College
B1	Careline Lifestyles	B1	Brunel Spire LLP	B1	Cundall
B1	Jacobs	B1	NRAM	B1	Gleeds
B1	Xerox Global Services	B1	Monster Travel	B1	The Labour Party
B1	The Wood Group Integrity Management	B1	Free Calim IDC Plc.	B1	Mount Grace Insurance Ltd.
B1	Edward Lloyd Trust	B1	Department for Work and Pensions	B1	DVLA
B1	NHS	B1	Valuation Office Agency	B1	Tait Walker Chartered Accountants
B1	Premier Health National				
D2	Gosforth Civic Hall	D2	Gosforth Customer Service Centre and Library		
SG	Irtor Garage				
V	Void (19)				

Use Class Proportions

B1	B2	A1	A2	A3	AS	C3	D2	SG	Vacant
52%(28)		2%(1)	2% (1)	2% (1)	2%(1)		4%(2)	2%(1)	35%(19)

4



Address : Regent Centre

Area (Ha) : 6.4

Map : NZ 2368 NE SE
NZ 2468 SW NW

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Drawn By:
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Ref: ED3.2 (11)	Site Name: St Nicholas Hospital	Area: 1.5ha
Description: Sensitive site in conservation area, surrounded by housing and open space, with relatively isolated industrial uses.		
Market Attractiveness Indicators:		
Indicator	Notes	Conclusion
1) Physical condition	Set in a green, mature landscape that is well maintained. Good condition, predominantly NHS uses but also Royal Mail depot beyond the eastern boundary.	Good 4
2) Levels of occupancy	Full with no visible voids on site.	Excellent 5
3) Accessibility, servicing & circulation	Entrance to the site is via the main Hospital entrance which is narrow and designed for light traffic. On site roads, layout and parking is good. Close proximity to Regent Centre Metro.	Average 3
4) Constraining land uses	Site is surrounded by residential and NHS buildings but it is close to Regent Centre.	Average 3
5) Access to the strategic road network	Access to A1 from the site is available via the Great North Road.	Good 4
Sustainability Indicators:		
Indicator	Notes	Conclusion
6) Public transport accessibility	Over 100,000 economically active people aged 16 – 74 within 30 minutes of the site by public transport.	Above Average: 4
7) Social development	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	Below Average 2
8) Jobs/workforce ratio	0.2 ratio of claimants against working age population, indicating that there is an balance of jobs and economically active in the area.	Below Average 2
9) Regeneration policy	The site is not within a Strategic Area of Change.	Average 3
10) Environmental constraints	Conservation Area and park beyond the western boundary. The park contains a nature reserve and a wildlife trust site.	Average 3
Other considerations: Off pitch location, limited demand for second hand office accommodation. 2		
Redevelopment/improvement potential: De-allocation could allow flexibility in future uses 1		

Conclusions:
De-allocate

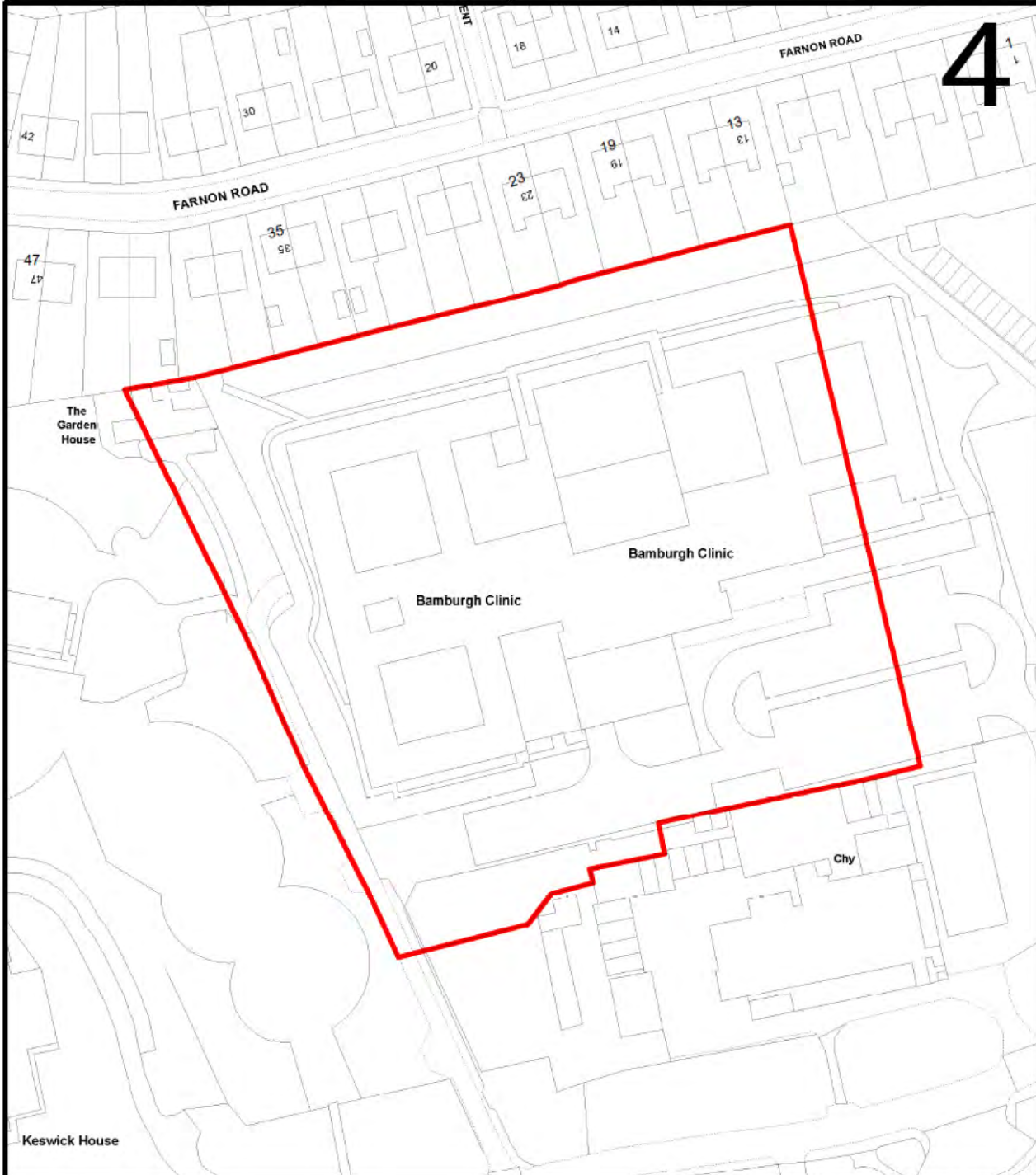
TOTAL SCORE 36

(Scoring: 5 = best, 1 = worst)

Use	Business	Use	Business
D2	Northumberland Wildlife Trust	D1	Newcastle & North Tyneside Northumberland Mental Health NHS Trust

Use Class Proportions

B1	B2	B8	A1	A3	C3	D1	D2	Vacant
						50% (1)	50% (1)	



Address : **St Nicholas Hospital**

Area (Ha) : 1.5

Map : NZ 2368 SW SE

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Appendix D - Summary of Existing ED3.1 / ED3.2 Employment Site Scores

Existing ED3.1 UDP Allocations

Ref	Site name	Accommodation	Site area (ha)	Allocated Uses	Conclusion on Market Attractiveness Indicators	Conclusion on Sustainability Indicators	Sites to be Retained / Allocated / Deallocated / Excluded
ED3.1 (1)	Airport Industrial Estate	General employment area	11.5ha	B1, B2, B8	The site scores high on market attractiveness indicators due to agglomeration benefits and accessibility factors, despite having high vacancy availability rates due to the current market conditions. There are a high proportion of A1 users on site.	The site scores highly on sustainability indicators due to its accessibility by public transport and location within a SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is no longer fit for purpose and should be de-allocated. It is anticipated that the site will remain in employment use for the foreseeable future but the site won't be protected. Due to out of town location further retailing would be resisted.
ED3.1 (2)	Albion Row Industrial Estate	Older general employment area, part of the Ouseburn Regeneration Area	0.9ha	B1, B2, B8	The site scores highly on market attractiveness indicators as it provides popular and affordable accommodation.	The site scores highly on sustainability indicators due to its accessibility by public transport and location within a SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is still 'fit for purpose' and should be retained, with potential consolidation of Albion Row, Hoult's Yard and Riverside East.
ED3.1 (3)	Armstrong Industrial Estate	General employment area, modern	3.14ha	B1, B2, B8	The site scores high on market attractiveness indicators due to agglomeration benefits and accessibility factors, despite having high vacancy availability rates due to the current market conditions.	The site scores highly on sustainability indicators due to its accessibility by public transport and location within a SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is still 'fit for purpose' and should be retained.
ED3.1 (4)	Bells Close Industrial Estate	General employment area, modern	3.8ha	B1, B2, B8	The site scores high on market attractiveness indicators due to its highly prominent and accessible location.	The site scores highly on sustainability indicators due to its location within a Strategic Commission Area and SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is still 'fit for purpose' and should be retained.

ED3.1 (5)	Bakery, Ponteland Road	Redeveloped for housing	0.8ha	B1, B2, B8	N/A	N/A	The site has been redeveloped for housing and as such should be de-allocated.
ED3.1 (6)	Blucher Industrial Estate	Small, isolated, former colliery, mixed use adjoining Green Belt	1.4ha	B1, B2, B8	The site is dilapidated and scores poorly on market attractiveness indicators due to its isolated location adjacent to the Green Belt.	The site performs poorly against sustainability indicators despite being located within a Strategic Commission Area and SOA which is within either the most 10% or 20% socially and economically deprived in England. New uses such as housing would be more appropriate in this location.	The site is no longer 'fit for purpose' and should be de-allocated.
ED3.1 (7)	Brough Parkway Industrial Estate	General employment area, modern	3.1ha	B1, B2, B8	This popular site scores high on market attractiveness indicators due to its accessibility and physical condition.	The site scores highly on sustainability indicators due to its accessibility by public transport and location within a SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is still 'fit for purpose' but should be de-allocated to allow the Fossway to be comprehensively re-developed as part of the Fossway Strategic Framework. Despite this, it is anticipated that the site will remain in employment use for foreseeable future.
ED3.1 (8)	Brunswick Industrial Estate	General employment area	19.8ha	B1, B2, B8	This popular site scores high on market attractiveness indicators due to its accessibility and physical condition.	The site scores has average scores above sustainability indicators due to average accessibility by public transport and its location adjacent to the Green Belt.	The site is still 'fit for purpose' and should be retained.
ED3.1 (9)	Condercum Road	Older general employment area, dominated by Neighbourhood Services depot. BSAAP	2.73ha	B1, B2, B8	This popular site scores above average on market attractiveness indicators due to its accessibility and physical condition.	The site scores highly against sustainability indicators due to its high accessibility by public transportation and location within a Strategic Commission Area.	The site should be de-allocated and re-allocated for mixed use in accordance with the BSAAP.

ED3.1 (10)	Fawdon Industrial Area	General employment area, two large multinational users: Sanofu-Aventis pharmaceuticals, and Nestle UK confectionary	19.8ha	B1, B2, B8	This site scores above average on market attractiveness indicators despite its location within a residential area.	The site which is within an SOA which is within either the most 10% or 20% socially and economically deprived in England has average scores against sustainability indicators.	The site should be de-allocated due to its proximity to housing. It is anticipated that the site will remain in employment use for as long as the existing businesses continue but it won't be protected in the future.
ED3.1 (11)	George Street/Blandford Street	General/light employment area, modern, City Centre AAP, Discovery Quarter and adjoining Newcastle College Campus	2.6ha	B1, B2, B8	This site scores above average on market attractiveness indicators due to its accessible location and proximity to the City Centre.	The site scores highly against public transport accessibility, social development, job density and regeneration indicators.	The site which is part of the Council's 'Discovery Quarter' should be re-allocated for mixed use development.
ED3.1 (12)	Gosforth Industrial Estate	General/light employment area on former railway land. Greggs Bakery main business.	4.0ha	B1, B2, B8	This site scores highly against market attractiveness indicators generally, but suffers from a poor internal layout.	The site scores highly against public transport accessibility, but only average scores are achieved against social development, regeneration and jobs / workforce indicators.	The site is no longer 'fit for purpose' and should be de-allocated. Although, it is anticipated that the site will remain in employment use but won't be protected in the future. Adjoining land uses prejudice the site coming forward for non-commercial uses.
ED3.1 (13)	Haddricks Mill Road	Small mixed use area, limited employment use	0.9ha	B1, B2, B8	The site is located adjacent to sensitive land uses, and is trading well albeit not B1, B2 or B8 uses.	The site scores highly against public transport accessibility, but there are no social or regeneration benefits from retaining the site for B1, B2 and B8 uses.	The site is no longer 'fit for purpose' and should be de-allocated.
ED3.1 (14)	Hoults Yard	19th century industrial area, converted and updated for various SMEs, part of Ouseburn Regeneration Area.	6.7ha	B1, B2, B8	The site scores well against market attractiveness indicators despite quite high vacancy levels.	The site which is located within a Strategic Commission Area scores highly against sustainability indicators.	The site is still 'fit for purpose' and should be retained, with potential consolidation of Albion Row, Hoults Yard and Riverside East.
ED3.1 (15)	Industry Road	General employment area, modern	5.7ha	B1, B2, B8	The site scores well against market attractiveness indicators due to its prominent location next to the Coast Road.	The site scores highly against public transport accessibility, but there are no social or regeneration benefits from retaining the site for B1, B2 and B8 uses.	The site is still 'fit for purpose' and should be retained.

ED3.1 (16)	Mill Lane Industrial Estate / Lynwood Development Centre	General employment (light industrial), modern	1.4ha	B1, B2, B8	The low cost workshop and office units remain popular with business start ups but are beginning to show signs of wear and tear.	The site is located within a Strategic Commission and scores reasonably against sustainability indicators.	The site is still 'fit for purpose' and should be retained.
ED3.1 (17)	New Bridge Street	Mixed use area, adjoining City Centre, limited employment use content	5.5ha	B1, B2, B8	The site has average scores against market attractiveness indicators despite good access to the strategic road network.	The site scores highly against public transport accessibility and social development indicators.	The site is no longer 'fit for purpose' and should be de-allocated. It is anticipated that the site the site will be brought forward for mixed use development.
ED3.1 (18)	Newburn Haugh Industrial Estate	General employment area	13.2ha	B1, B2, B8	The site scores highly on market attractiveness indicators as it provides popular and affordable accommodation.	The site has average scores against sustainability indicators.	The site should be de-allocated due to its proximity to housing. It is anticipated that the site will remain in employment use for as long as the existing businesses continue but it won't be protected in the future. The site should be redeveloped in a comprehensive manner to provide an interface between Newburn Haugh and Lemington village.
ED3.1 (19)	Newburn Industrial Estate	General employment area, modern, including larger units	17.8ha	B1, B2, B8	The site scores highly on market attractiveness indicators as it provides popular, modern and affordable accommodation.	The site scores highly against social development indicators.	The site is still 'fit for purpose' and should be retained potentially as part of Lemington Corridor / Newburn Haugh Industrial Estate to compliment Newburn Riverside.
ED3.1 (20)	Newburn High Street / Walbotte Road	Remaining part of larger 19th century industrial area.	4.0ha	B1, B2, B8	The site scores high on market attractiveness indicators, despite having high vacancy availability rates due to the current market conditions.	The site scores highly against social development indicators.	The site is no longer 'fit for purpose' and should be de-allocated. The site provides the opportunity for mixed use comprehensive redevelopment to provide a gateway to Newburn.
ED3.1 (21)	Newcastle Brewery	Older industrial area, mostly vacant, acquired for Science City and mixed use developments	10.9ha	B1, B2, B8	The site scores high on market attractiveness indicators and forms part of the emerging Science Central.	The site scores highly against social development and public transport accessibility indicators.	De-allocate. The comprehensive redevelopment is covered in the Urban Core Area Action Plan.
ED3.1 (22)	Noble Street Industrial Estate	General employment area, modern, part of Benwell Scotswood Innovation Parkway.	3.2ha	B1, B2, B8	The site scores highly on market attractiveness indicators as it provides popular and affordable accommodation.	The site is located within a Strategic Commission and scores reasonably against sustainability indicators.	The site is still 'fit for purpose' and should be retained in accordance within BSAAP.
ED3.1 (23)	Pooley Road/ Slatyford Lane	Remaining small general employment area (light industry), after redevelopment for retail park, modern.	5.0ha	B1, B2, B8	N/A	N/A	The site has been redeveloped as a retail park and bus depot, and as such is no longer 'fit for purpose' and should be de-allocated.

ED3.1 (24)	Premier Development Centre, Whitehouse Road	General employment area, modern, part of Benwell Scotswood Innovation Parkway	2.7ha	B1, B2, B8	Tenants are in the process of being decanted with a view to transferring the site to a development partner, to redevelop the site for industrial use, indicating that the site is attractive to the market.	The site scores highly against social development and public transport accessibility indicators.	The site is still 'fit for purpose' and should be retained.
ED3.1 (25)	Prospect/ Tynos Works	Remaining part of 19th century industrial area.	3.6ha	B1, B2, B8	The site scores highly against all market attractiveness indicators, despite being in Sui Generis use.	The site is located within a Strategic Commission and scores reasonably against sustainability indicators.	The site is no longer 'fit for purpose' and should be de-allocated. The site provides the opportunity to reintegrate Scotswood Road and the river.
ED3.1 (26)	Mill Lane South (former Rainbow Workshop)	Closed. Small development in isolated location.	0.5ha	B1, B2, B8	N/A	N/A	The site has been demolished and cleared and as such is no longer 'fit for purpose'.
ED3.1 (27)	Riverside East	Remaining part of 19th century industrial area.	21.2ha	B1, B2, B8	The site has above an average vacancy rate and average scores against market attractiveness indicators.	The site is located within a Strategic Commission and scores reasonably against sustainability indicators.	Site levels render part of the site not 'fit for purpose'. Potential for consolidation of Albion Row, Hoult's Yard and Riverside East. The likelihood is that the site will come forward for mixed use with an element of employment use. The comprehensive redevelopment of the site will be explored in the UCAAP. The site provides the opportunity to reconnect St Peters and the Ouseburn.
ED3.1 (28)	Scotswood Road Industrial Estate	General employment area, modern.	12.1ha	B1, B2, B8	The site with a Scotswood Road frontage scores well on market attractiveness indicators.	The site located within a Strategic Commission Area performs well against public transport accessibility and regeneration indicators.	The site is no longer 'fit for purpose' and should be de-allocated. The site provides an opportunity to re-integrate the river and Scotswood Road. The site provides the opportunity to reintegrate Scotswood Road and the river.
ED3.1 (29)	Scotswood Road West	General employment area, modern, dominated by BAE Systems UK Armstrong Works	17.4ha	B1, B2, B8	The site with a Scotswood Road frontage scores well on market attractiveness indicators.	The site located within a Strategic Commission Area performs well against public transport accessibility and regeneration indicators.	The site is still 'fit for purpose' and should be retained.
ED3.1 (30)	Shieldfield Industrial Estate	Small general employment area, modern, part of Ouseburn Regeneration Area.	1.4ha	B1, B2, B8	The site provides popular, affordable accommodation and scores well against market attractiveness indicators.	The site located within a Strategic Commission Area performs well against public transport accessibility and regeneration indicators.	The site is no longer 'fit for purpose' and should be de-allocated. Although, it is anticipated that the site will remain in employment use but won't be protected in the future.

ED3.1 (31)	Shields Road West	Older small-scale general employment area adjoining district centre.	7.2ha	B1, B2, B8	The site scores poorly against market attractiveness indicators, with units showing signs of wear and tear and high vacancy rates.	The site located within a Strategic Commission Area performs well against public transport accessibility, social development, jobs/workforce and regeneration indicators.	The site is no longer 'fit for purpose' and should be de-allocated. Although, it is anticipated that the site will remain in employment use but won't be protected in the future.
ED3.1 (32)	Shields Road/ Fossway	19th/20th century general employment area, mainly Siemens complex, now more varied.	41.7ha	B1, B2, B8	The site has average scores against market attractiveness indicators.	The site located within a Strategic Commission Area performs well against public transport accessibility, social development and regeneration indicators.	The site is still 'fit for purpose' but should be de-allocated to allow the Fossway to be comprehensively re-developed as part of the Fossway Strategic Framework. Despite this, It is anticipated that the site will remain in employment use for foreseeable future.
ED3.1 (33)	Throckley Industrial Estate	General, modern employment area, including Ibstock brickworks.	20.6ha	B1, B2, B8	Popular, modern employment area which scores well against market attractiveness indicators.	The site, located adjacent to the Green Belt has average scores against sustainability indicators.	The site is still 'fit for purpose' and should be retained.
ED3.1 (34)	Walker Riverside Industrial Park	19th/20th century general employment area, and specialist offshore, sub-sea uses, partly in Walker Riverside AAP and covered by Neptune Energy Park Local Development Order.	11.3ha	B1, B2, B8	The site is popular with specialist offshore and sub-sea users and has average scores against market attractiveness indicators.	The site scores highly against regeneration, environmental, social development and jobs/workforce indicators but suffers from poor public transport indicators.	The site is still 'fit for purpose' and should be retained.
ED3.1 (35)	Walker Riverside	General employment area, also specialist offshore, sub-sea uses.	50.2ha	B1, B2, B8	The site is popular with specialist offshore and sub-sea users and has average scores against market attractiveness indicators. Partially located within Environment Agency Flood Zone 3.	The site scores highly against regeneration, environmental, social development and jobs/workforce indicators but suffers from poor public transport indicators.	The site is still 'fit for purpose' and should be retained.
ED3.1 (36)	Warwick Street	20th century mixed use area, now with limited employment use.	4.5ha	B1, B2, B8	The site has average scores against market attractiveness indicators.	The site scores highly against public transport accessibility but otherwise poorly against sustainability indicators.	De-allocate. Site will remain in employment use but won't be protected in the future. Site should be redeveloped in a comprehensive manner.
ED3.1 (37)	Westerhope Industrial Estate	General/light employment area.	8.1ha	B1, B2, B8	The site scores reasonably well against market attractiveness indicators but suffers from an above healthy vacancy rate.	The site scores poorly against environmental indicators due to it's location next to the Green Belt.	De-allocate. Site will remain in employment use but won't be protected in the future. Redevelopment of the site should be brought forward in a comprehensive manner.

ED3.1 (38)	Whitehouse Road	General employment area, modern	3.1ha	B1, B2, B8	Tenants are in the process of being decanted with a view to transferring the site to a development partner, to redevelop the site for industrial use, indicating that the site is attractive to the market.	The site scores highly against social development and public transport accessibility indicators.	The site is still fit for purpose.
ED3.1 (39)	Whickham View	Small single user site in isolated residential location.	0.6ha	B1, B2, B8	The site benefits from good links to the strategic road network but otherwise has average scores against market attractiveness indicators.	The site located within a Strategic Commission Area performs well against public transport accessibility and regeneration indicators.	De-allocate. Site will remain in employment use but won't be protected in the future.
ED3.1 (40)	Former Colliery Buildings Havannah	Small single user site in isolated location in Green Belt, subject to saved UDP policy GB2.4.	2.6ha	B1, B2, B8	The site has scores well against market attractiveness indicators.	The site located within the Green Belt scores poorly against sustainability indicators.	The site is no longer 'fit for purpose' and should be de-allocated.
ED3.1 (41)	Prestwick Industrial Estate	Mixed use area, mainly airport related uses.	2.0ha	B1, B2, B8	The site has average / above average scores against sustainability indicators and is used for airport related uses.	The site has average scores against sustainability indicators.	De-allocate and re-allocate for airport related uses.
Total			358.67ha				

Total area to be retained for B1/ B2/ B8 use	167.74
Total area to be de-allocated but likely to remain in employment use for the foreseeable future.	119.1
Total area to be de-allocated	71.83

Existing ED3.2 UDP Allocations

Ref	Site name	Accommodation	Site area (ha)	Allocated Uses	Conclusion on Market Attractiveness Indicators	Conclusion on Sustainability Indicators	Sites to be Retained / Allocated / Deallocated / Excluded
ED3.2 (1)	Barrack Road	Modern business accommodation	6.7ha	B1	The site has average scores against market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	The site is longer 'fit for purpose' and should be de-allocated. Site will remain in employment use but won't be protected in the future. The site should be redeveloped in a comprehensive manner.
ED3.2 (2)	Central Business Park	Modern office accommodation, City Centre AAP	2.4ha	B1	The site scores highly against all market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	The site does not function as a Technology Park and its popularity has deteriorated over recent years. The site should be de-allocated, although it is anticipated that the existing office use will continue for the foreseeable future. The site could be redeveloped in a comprehensive manner to link in with East Pilgrim Street and Northumbria University East Campus.
ED3.2 (3)	Denmark Street/Heaton Road	Purpose-built light industrial accommodation	2.5ha	B1	The site has average scores against market attractiveness indicators.	The site scores highly against sustainability indicators.	The site is longer 'fit for purpose' and should be de-allocated
ED3.2 (4)	Kenton Bar	Closed. Redeveloped for housing.	7.3ha	B1	N/A	N/A	The site has been redeveloped for housing and as such should be de-allocated.
ED3.2 (5)	Longbenton DSS	Modern redeveloped office accommodation, specialist, for HM Customs and Revenue	23.9ha	B1	The site scores highly against all market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	The site is no longer 'fit for purpose and should be de-allocated, but is expected to remain in employment use for the time being. The likelihood is that the remaining part of the UDP allocation will come forward for housing.
ED3.2 (6)	Millers Hill, Shields Road	Mixed use area	0.8ha	B1	The site scores highly against all market attractiveness indicators but is not occupied by B1/B2/B8 users.	The site scores highly against sustainability indicators.	The site is longer 'fit for purpose' and should be de-allocated.

ED3.2 (7)	Newcastle Business Park	Modern office accommodation	23.3ha	B1	The site scores highly against all market attractiveness indicators.	The site scores highly against sustainability indicators.	The site is still 'fit for purpose' and should be retained.
ED3.2 (8)	Portland Road	Mixed use area	0.8ha	B1	The site has average scores against market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	De-allocate. Other uses are considered to be more viable.
ED3.2 (9)	South Jesmond (Portland Terrace)	Mixed use area	2.0ha	B1	The site has average scores against market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	De-allocate but likely to remain in office use for time being. Site is included within the SHLAA as being suitable, available and deliverable for residential development.
ED3.2 (10)	Regent Centre	Modern refurbished and new office accommodation, now expanded by development for Northern Rock HQ.	6.4ha	B1	The site has above average scores against market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	The site is still 'fit for purpose' and should be retained.
ED3.2 (11)	St. Nicholas Hospital	Redeveloped for hospital uses	1.5ha	B1	The site has average / above average scores against market attractiveness indicators.	The site scores highly against public transport indicators but otherwise has average scores.	The site is no longer 'fit for purpose' and should be de-allocated.
Total			77.6ha				

Total area to be retained for B1 use	29.7ha
Total area to be de-allocated but likely to remain in employment use for the foreseeable future.	35.0ha
Total area to be de-allocated	12.9ha

Appendix E - Summary of ED1 allocations

Site name	Allocated Uses	Site area (ha)	Remaining Capacity (net)	Allocated Uses
Northern Development Area (The site has now been renamed as Great Park)	General	80.00	0.00	The site has been partially developed. It is made up of three cells: A, B and C. Cell A is the only site where no development activity has occurred as it has been allocated as a long term development site. The majority of the land within cell B has been developed for office accommodation by Sage Software. Cell C has been developed as a small 3 storey office development. The remaining capacity will be developed out as housing. .
Collingwood Clinic	B1	5.40	0.00	Development of 280,000 sq ft of office floorspace known as The Tower, on behalf of Northern Rock, which has recently been purchased by Newcastle City Council for £22m. The site has been developed out, therefore no further potential exists.
St Silas, Shields Road	B1	1.00	0.00	Due to its district centre location, the site has been developed for leisure and retail uses predominantly by Gala Bingo and other fast food outlets and shop units. Therefore this potential site for office development has been lost. De-allocate.
Newburn Haugh (The site has now been renamed as Newburn Riverside)	B1/B2/B8	75.00	3.66	The site belongs to Onsite / Langtree. Part of the site has been developed by Land Estates for light industry and offices. 51ha remains available. Site is to come forward for housing and is therefore de-allocated. 3.66ha will remain for employment use.
Walker Riverside Industrial Estate	B1/B2/B8	7.90	0.00	The site has been developed for offshore industrial and engineering and factory units. No further potential exists. (check overlap layer)
Sandhills	B1/B2/B8	2.70	0.00	The site has been redeveloped as an eco-centre for Parks and Countryside Training. No further potential exists for B1/B2/B8. De-allocate.
Heaton Junction	B1/B2/B8	5.20	0.00	UDP allocation largely superseded by changing requirements of the rail network. Site considered as part of the SHLAA. De-allocate.
Fowberry Road, Scotswood Road	B1/B2/B8	0.50	0.00	Small isolated site, which has been retained for economic growth as part of the BSAAP.
Newcastle International Airport	N/A	52.00	37.58	A total of 203 hectares of land is allocated for airport related development of which 37.58 (net) hectares available (under the UDP) for new development.
North Brunton	N/A	2.00	0.00	N/A Essential services for trunk road users.
	Total	231.7	41.24	

Appendix F - Potential Employment Sites Proforma

Newcastle Employment Land Review 2012 Individual Site Inspection Pro forma

Site Reference & Address				
Area (hectares)				Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	
Undeveloped Land Availability	Short Term	Medium Term	Long Term	
Internal Environment	Good	Average	Poor	
External Environment	Good	Average	Poor	
Road Access	Good	Average	Poor	
Public Transport	Good	Average	Poor	
Market Attractiveness	Good	Average	Poor	
Overall Assessment	Good	Average	Poor	

TOTAL SCORE

(Scoring: 5 = best, 1 = worst)

Appendix G - Methodology for ranking proposed employment sites


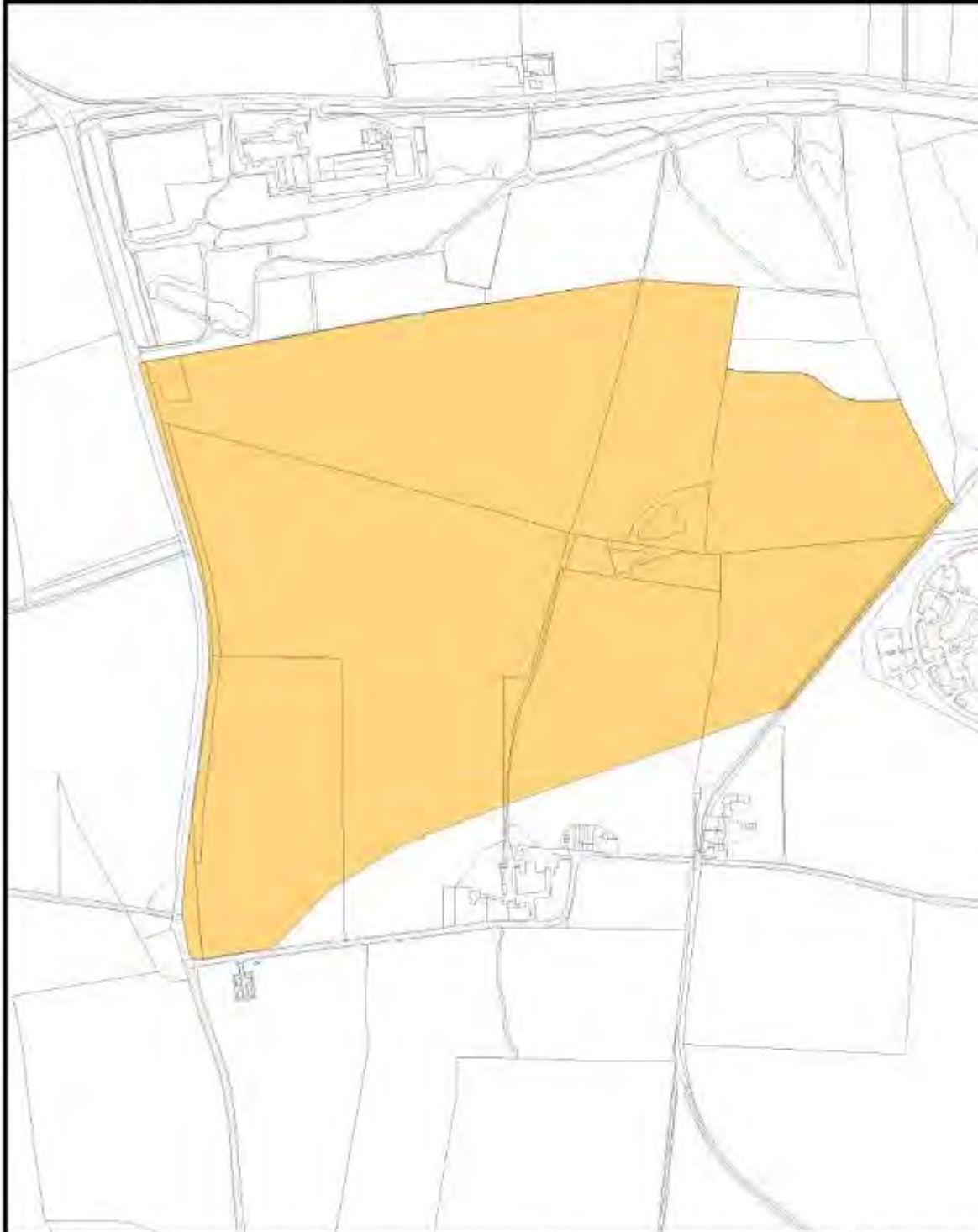
Newcastle Employment Land Review 2012 Individual Site Inspection Pro forma

Site Reference and Address				
Area (hectares)				Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	State use – existing employment. Existing Employment – Good (5) – Not in
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	State use. Brownfield – Good (5) – Greenfield (0)
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Short (5), Medium (3), Long (0)
Internal Environment	Good	Average	Poor	Modern buildings, high quality infrastructure and landscape (5), Old buildings or
External Environment	Good	Average	Poor	Surrounded by good quality buildings with nearby facilities for staff (5),
Road Access	Good	Average	Poor	Good or adjacent to major trunk road with good internal roads (5), Within 2 – 3 miles of a major trunk road and having a reasonable internal estate network (3),
Public Transport	Good	Average	Poor	Number of economically active people aged 16 – 74 within 30 minutes of each
Market Attractiveness	Good	Average	Poor	Good – few vacant properties on the estate or within the immediate area and good rental and capital values (5), Average – a number of vacant properties on the estate, taking longer to be occupied at moderate
Overall Assessment	Good	Average	Poor	Good – Performs well, in the local /regional market for either it's existing or proposed use (5), performs well in the local/regional market for its existing or

TOTAL SCORE

(Scoring: 5 = best, 1 = worst)

Appendix H - New Portfolio Site Scores

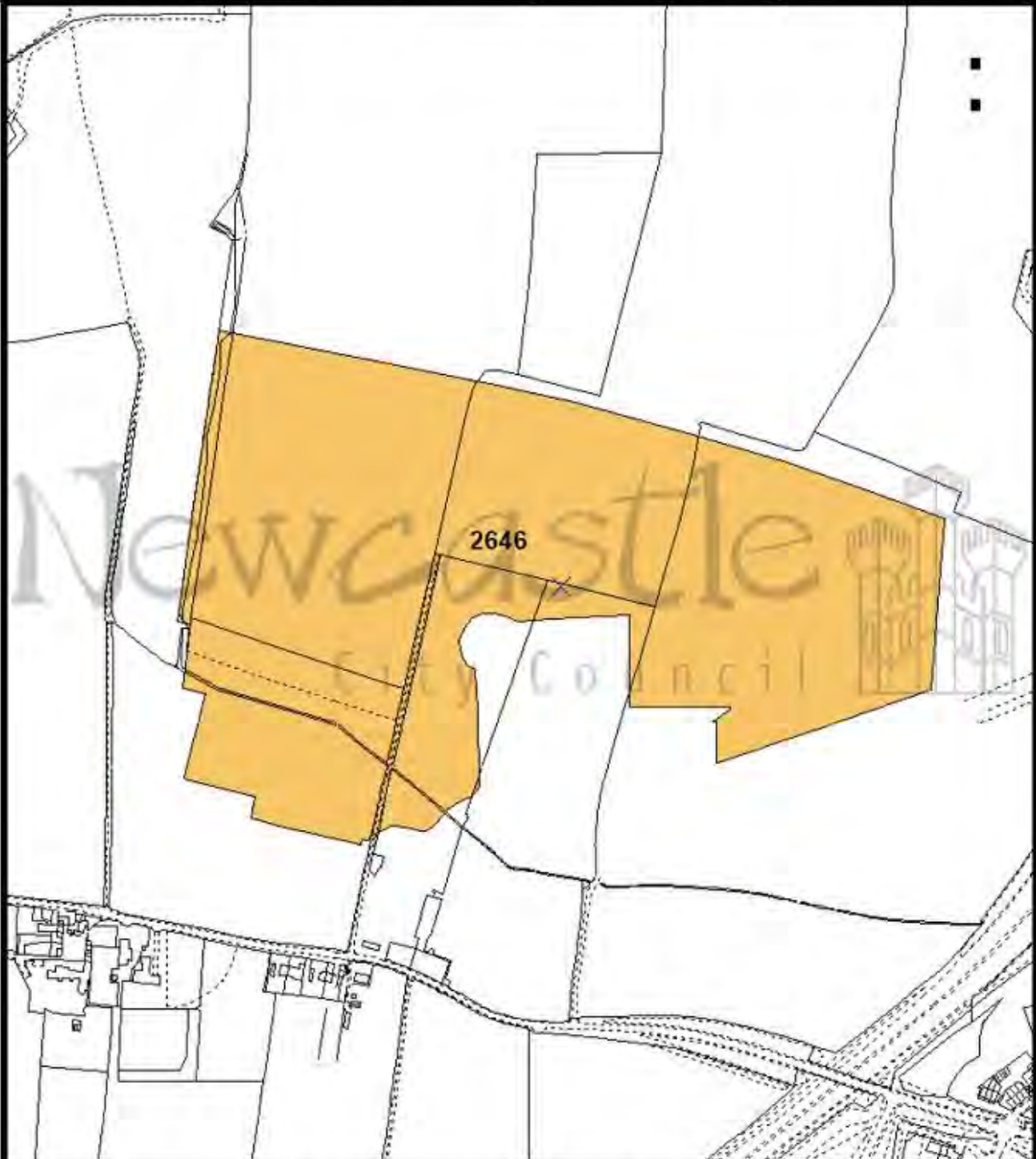
	<p>Environment and Regeneration</p>	<p>Land Resource System Site Reference: 2644</p>	
			<p>4</p>
<p>Address : Newcastle Great Park (NGP) Cell A</p>		<p>Area (Ha) : 55.18</p>	<p>Map : NZ 2170 NE NW NZ2171 NZ2271 NW SW</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>			
<p>Scale : 1:7,000 @ A4</p>	<p>Date of Publication: 17/03/2010</p>	<p>© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009.</p>	<p>Drawn By: J McLaughlin</p>

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	2644: Newcastle Great Park Cell A			
Area (hectares)	55.18ha			
Current Use	Office	Industrial	Mixed	Greenfield site.
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Greenfield site.
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Phased development S/M/L.
	√	√	√	
Internal Environment	Good	Average	Poor	No obstacle.
		√		
External Environment	Good	Average	Poor	Adjacent to completed office development (4167) and future office development (2644).
		√		
Road Access	Good	Average	Poor	Via Brunton Lane / Bobby Robson Way.
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade C. Adjacent Park & Ride facility.
		√		
Market Attractiveness	Good	Average	Poor	Viable without public sector intervention, subject to market conditions improving.
Overall Assessment	Good	Average	Poor	Site owner has indicated preference for housing. The likelihood is that the site will come forward for housing.

TOTAL SCORE

(Scoring: 5 = best, 1 = worst)



Address : Newcastle Great Park
Cell C

Area (ha) : 21.82

Map : NZ 2271 SE
NZ 2371 SW/SE
NZ 2270 NE
NZ 2370 NW

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Tel: 0191 232 8520
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Scale : 1:5,000

Date : 12/12/2006

Drawn by : AM

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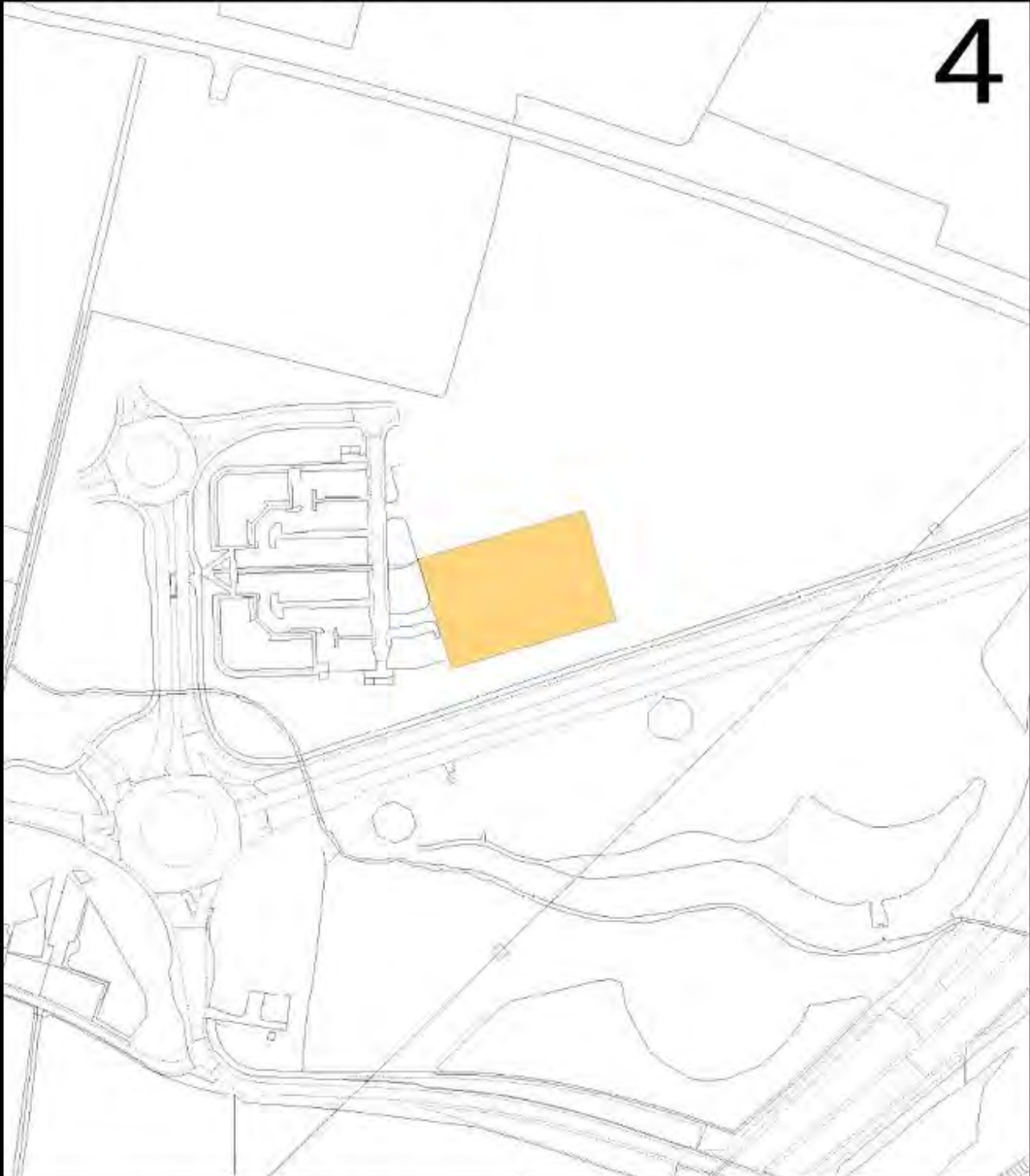
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	2646: Newcastle Great Park (NGP) Cell C			
Area (hectares)	21.82ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site.
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Greenfield site.
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Phased development S/M/L.
	√	√	√	
Internal Environment	Good	Average	Poor	Small part of site falls within EA Flood Zone 2 and 3.
		√		
External Environment	Good	Average	Poor	Adjacent to completed office development (4167) and future office development (2644).
		√		
Road Access	Good	Average	Poor	Via Brunton Lane / Bobby Robson Way.
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade C. Adjacent Park & Ride facility.
		√		
Market Attractiveness	Good	Average	Poor	Viable without public sector intervention, subject to market conditions improving.
Overall Assessment	Good	Average	Poor	Not available. The site will come forward for housing

TOTAL SCORE	40
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : Newcastle Great Park (NGP)
Office Block D, Cell C

Area (Ha) : 0.49

Map : NZ 2371 SW
NZ 2370 NW

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Scale : 1:3,000 @ A4

Date of
Publication: 17/03/2010

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Drawn By:
J McLaughlin

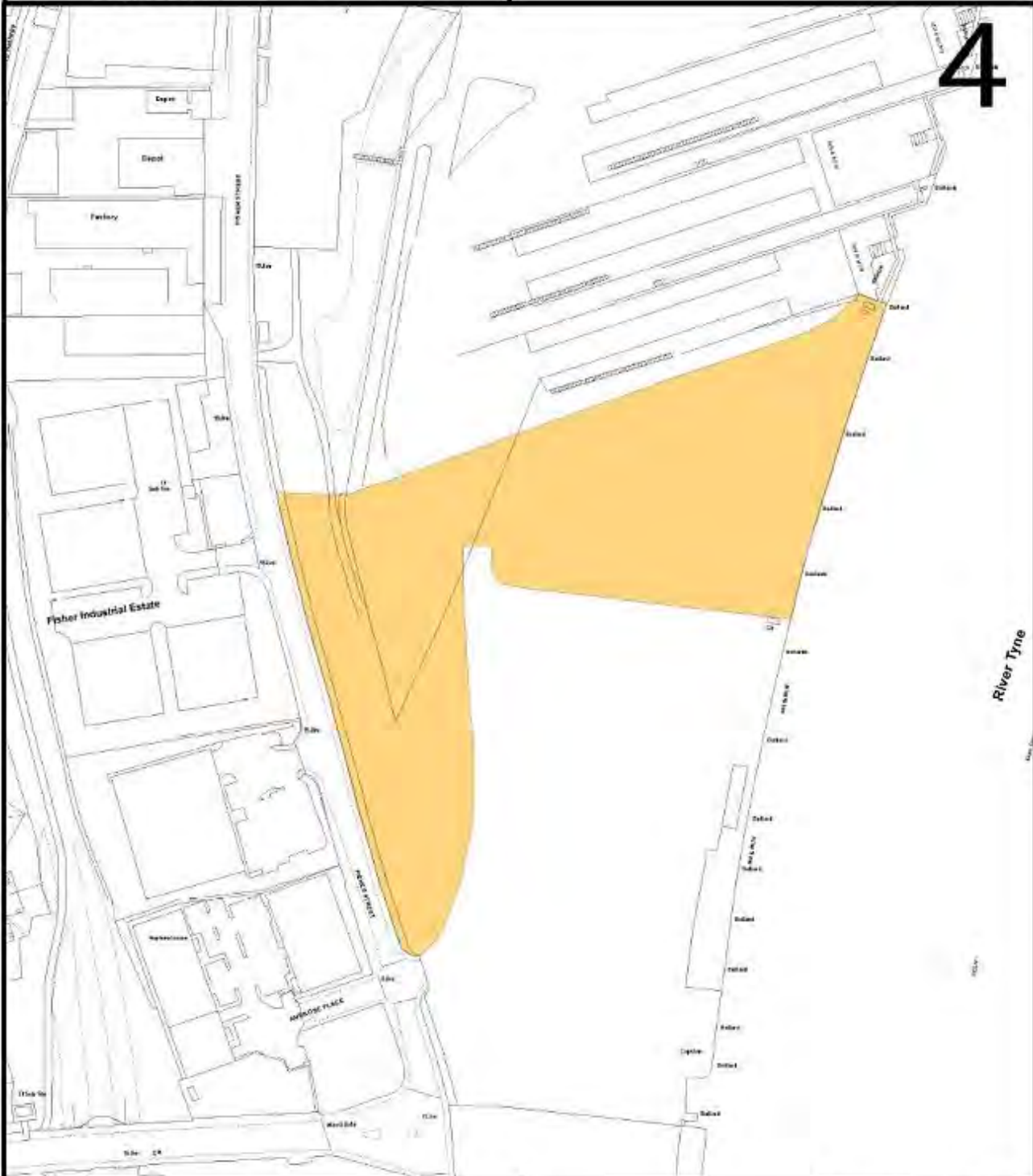
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4211: NGP office block D, Cell C			
Area (hectares)	0.49ha			
Current Use	Office	Industrial	Mixed	Greenfield site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated under UDP Policy ED1. (5)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Cell C. Planning permission has been granted (1999/1300/117/RES). (4)
	√	√		
Internal Environment	Good	Average	Poor	Relatively flat, greenfield site. (3)
	√			
External Environment	Good	Average	Poor	B1 to the west (4137), surrounding low grade agricultural land. Noise from A1 and Newcastle International Airport. (4)
		√		
Road Access	Good	Average	Poor	Access via Bobby Robson Way. Close proximity to the A1. (5)
	√			
Public Transport	Good	Average	Poor	Public transport accessibility Grade C. (3)
		√		
Market Attractiveness	Good	Average	Poor	Development has stalled due to the recession, but development of the local centre is likely to increase market attractiveness and demand accordingly. (3)
		√		
Overall Assessment	Good	Average	Poor	RSS identifies Great Park as being a significantly important site, and the remainder of the site will be developed for office and high tech research and development uses.(4)
	√			

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : **Shephard Offshore A
Walker Riverside North**

Area (Ha) : **2.07**

Map : NZ 2965 SE
NZ 2964 NE

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Scale : 1:2,000 @ A4

Date of
Publication: 19/03/2010

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Drawn By:
J McLaughlin

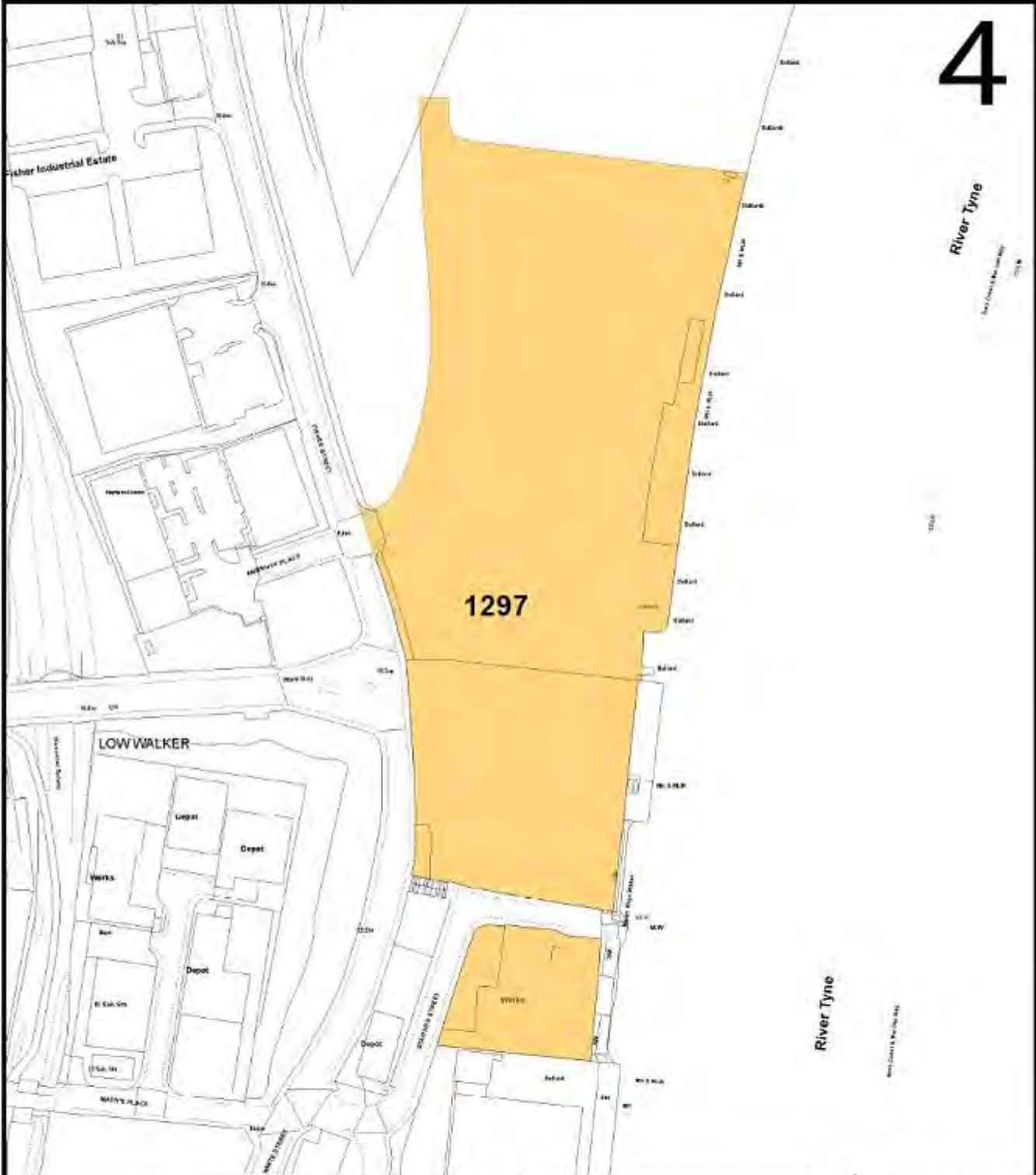
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1297: Shepherd Offshore A, Walker Riverside North.		
Area (hectares)	2.73ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√		
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
			√
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		
Development on site has commenced, financed privately. (5)			

TOTAL SCORE | 32

(Scoring: 5 = best, 1 = worst)

4



Address : **Shephard Offshore B
Walker Riverside North**

Area (Ha) : 3.16

Map : NZ 2965 SE
NZ 2964 NE

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Scale : 1:2,000 @ A4

Date of
Publication: 19/03/2010

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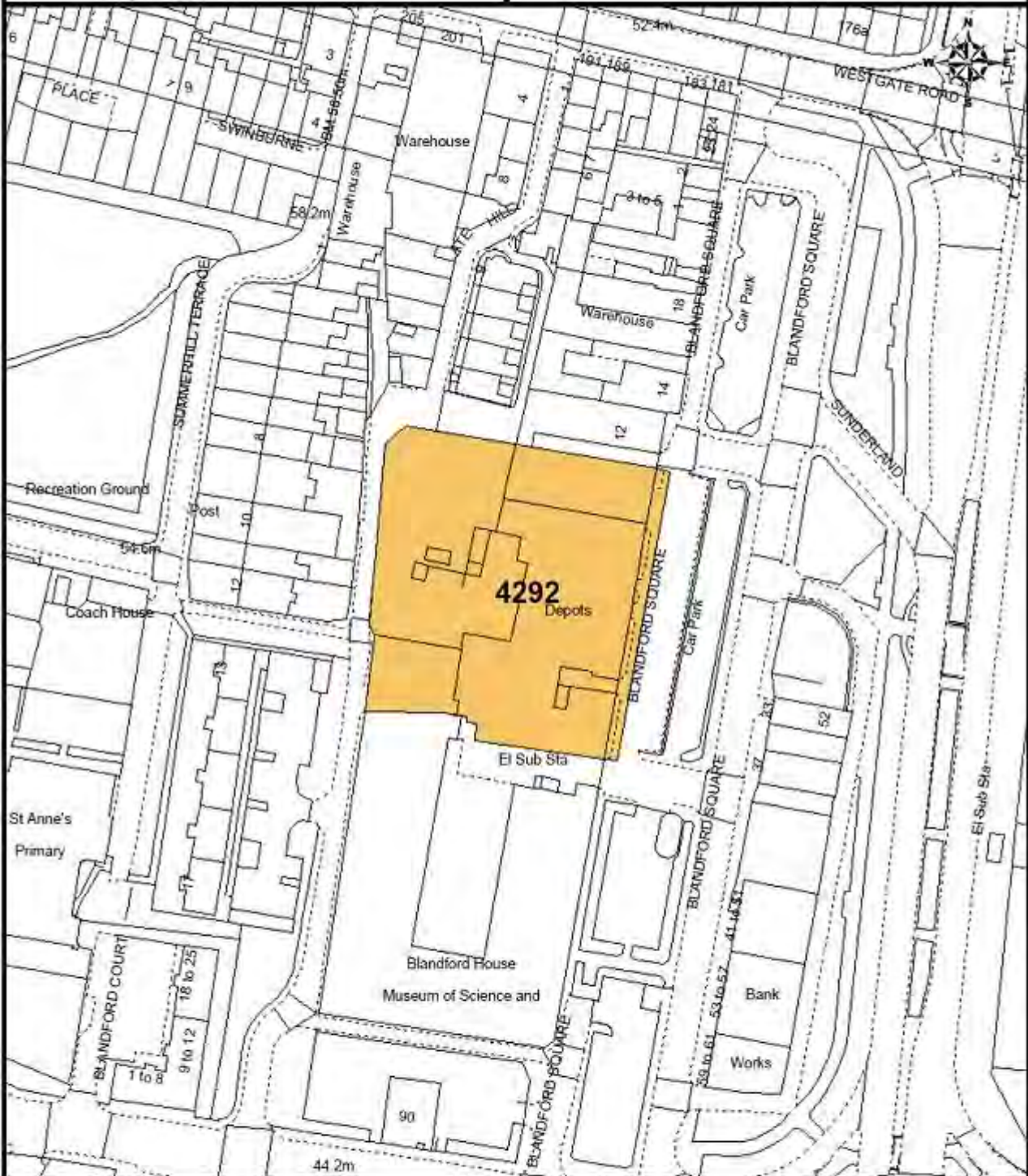
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1297: Shepherd Offshore B, Walker Riverside North.		
Area (hectares)	2.73ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√		
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
			√
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		

TOTAL SCORE | 32

(Scoring: 5 = best, 1 = worst)



Address : **CWS Depot**
Blandford Square

Area (Ha) : 0.45

NZ 2464 SW
Map : NZ 2463 NW

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Date of
Publication: 02/07/2008

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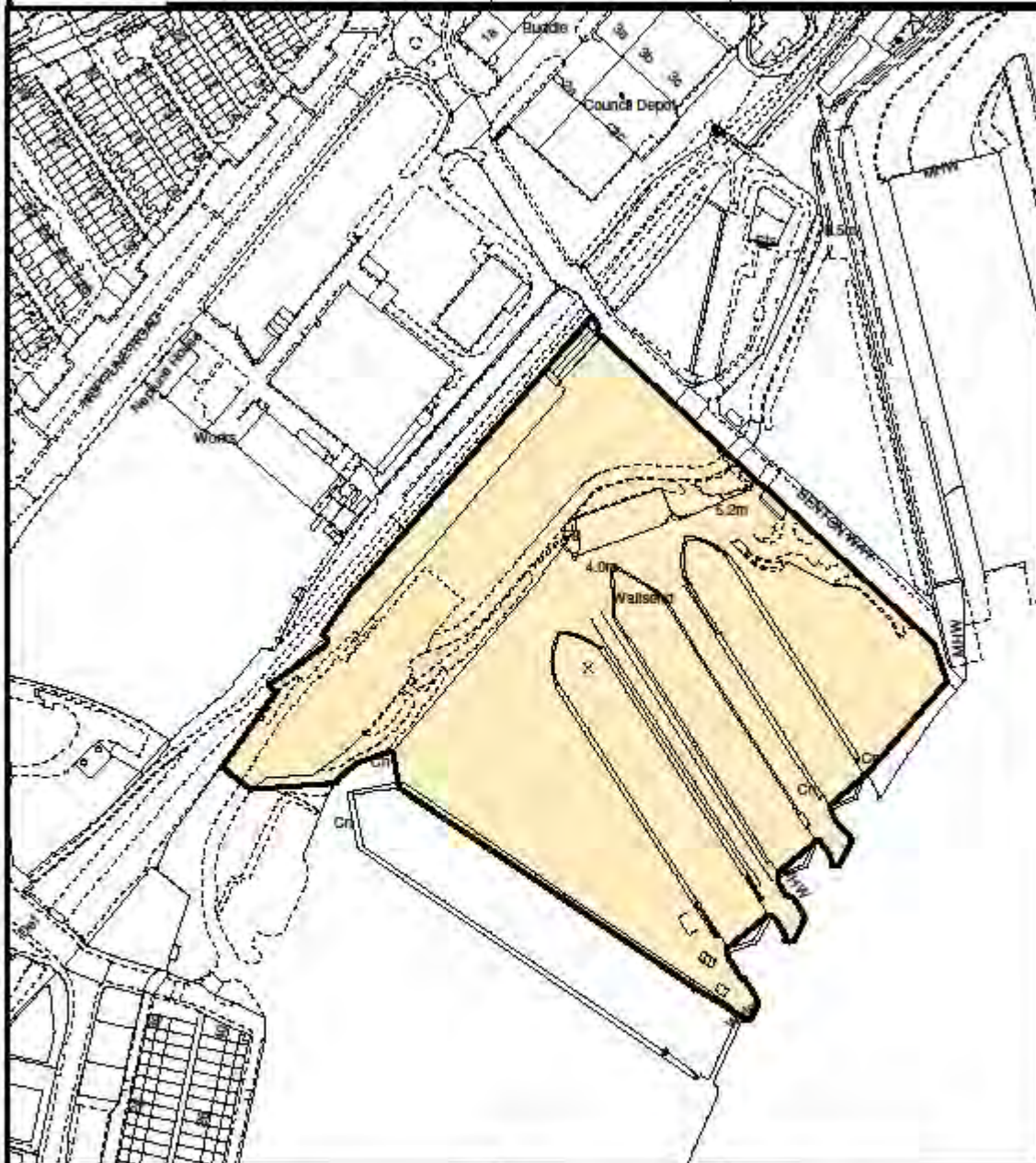
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4292: CWS Engineering Depot, Blandford Square, St James Boulevard		
Area (hectares)	0.45ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		

TOTAL SCORE | 30

(Scoring: 5 = best, 1 = worst)



Address : Neptune Yard 2B

Area (Ha) : 5.59

Map: 2965NE/SE
3065NW

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Scale : 1:2,500

Date: 28/03/2013

Drawn by : DMH

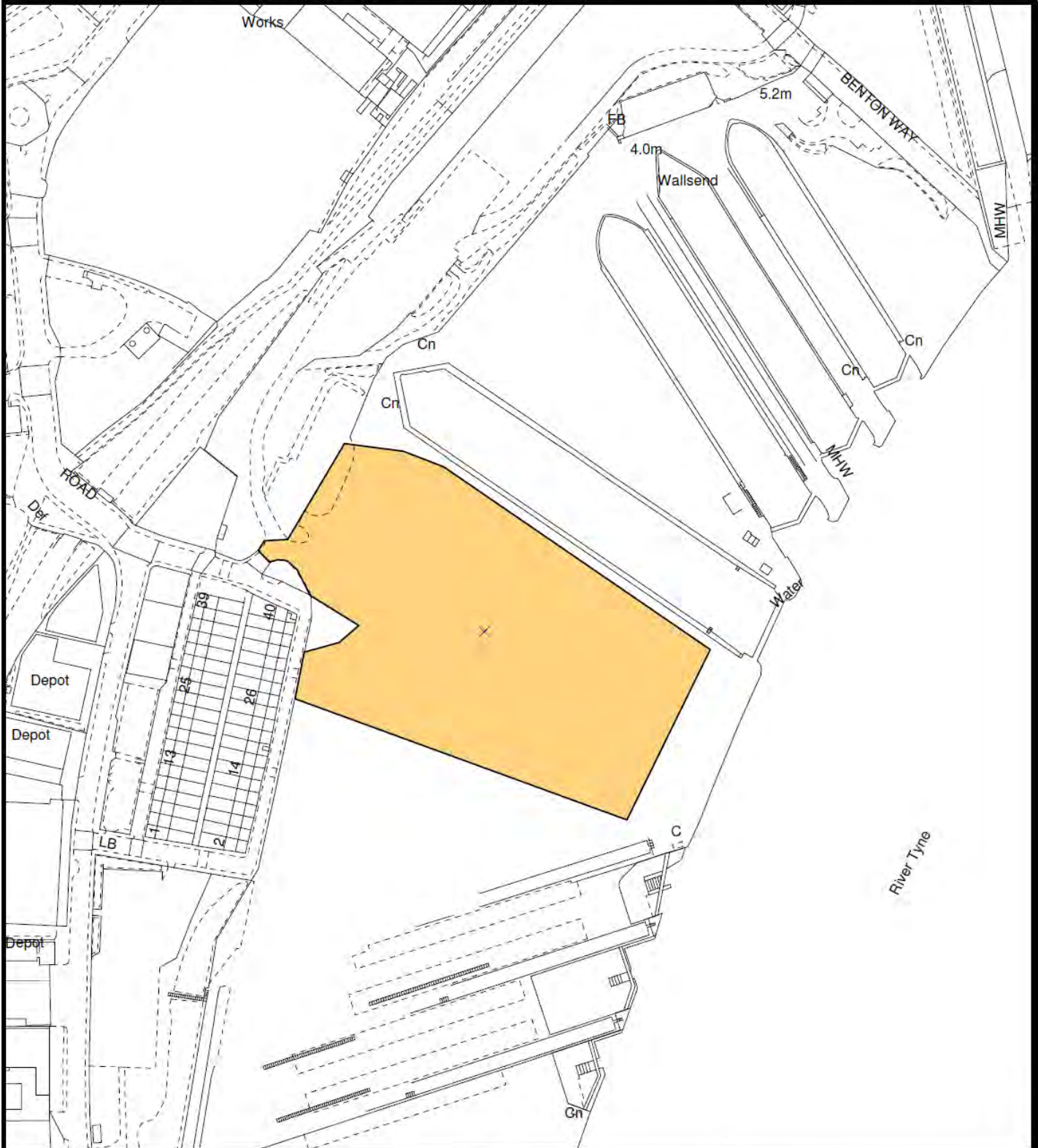
Paul Herbertson
Director of Resources & Performance
Environment & Regeneration

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5294 (ED3.1 (35)) Walker Riverside North (Neptune Energy Park Phase 3)			
Area (hectares)	5.59ha			
Current Use	Office	Industrial	Mixed	Vacant – former dry docks (5)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	PDL (5)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Neptune Energy Park Phase 3 (5)
	√	√		
Internal Environment	Good	Average	Poor	The site is on two main levels and will require remediation works. (3)
		√		
External Environment	Good	Average	Poor	Residential and B2 (3)
		√		
Road Access	Good	Average	Poor	Close proximity to both the Fossway and Walker Road. (5)
	√			
Public Transport	Good	Average	Poor	Average Accessibility Grade C (3)
	√			
Market Attractiveness	Good	Average	Poor	This site forms part of Neptune Energy Park, which has been identified as a Low Carbon Enterprise Zone and benefits from reduced business rates and other incentives. Neptune Energy Park is subject to a Local Development Order, which allows a simplified planning process to take place whereby there is no requirement for planning permission for purposes falling into B1, B2 and B8 use that is involved in marine offshore related industries and renewable energy low carbon manufacturing uses.(5)
	√			
Overall Assessment	Good	Average	Poor	Site is likely to come forward in the short term(5)
	√			

TOTAL SCORE | 39

(Scoring: 5 = best, 1 = worst)



Address : Land on former Neptune Yard
off Fisher Street

Area (Ha) : 2.10

Map: 2965SE

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Scale : 1:2,500

Date :21/03/2013

Drawn by : DMH

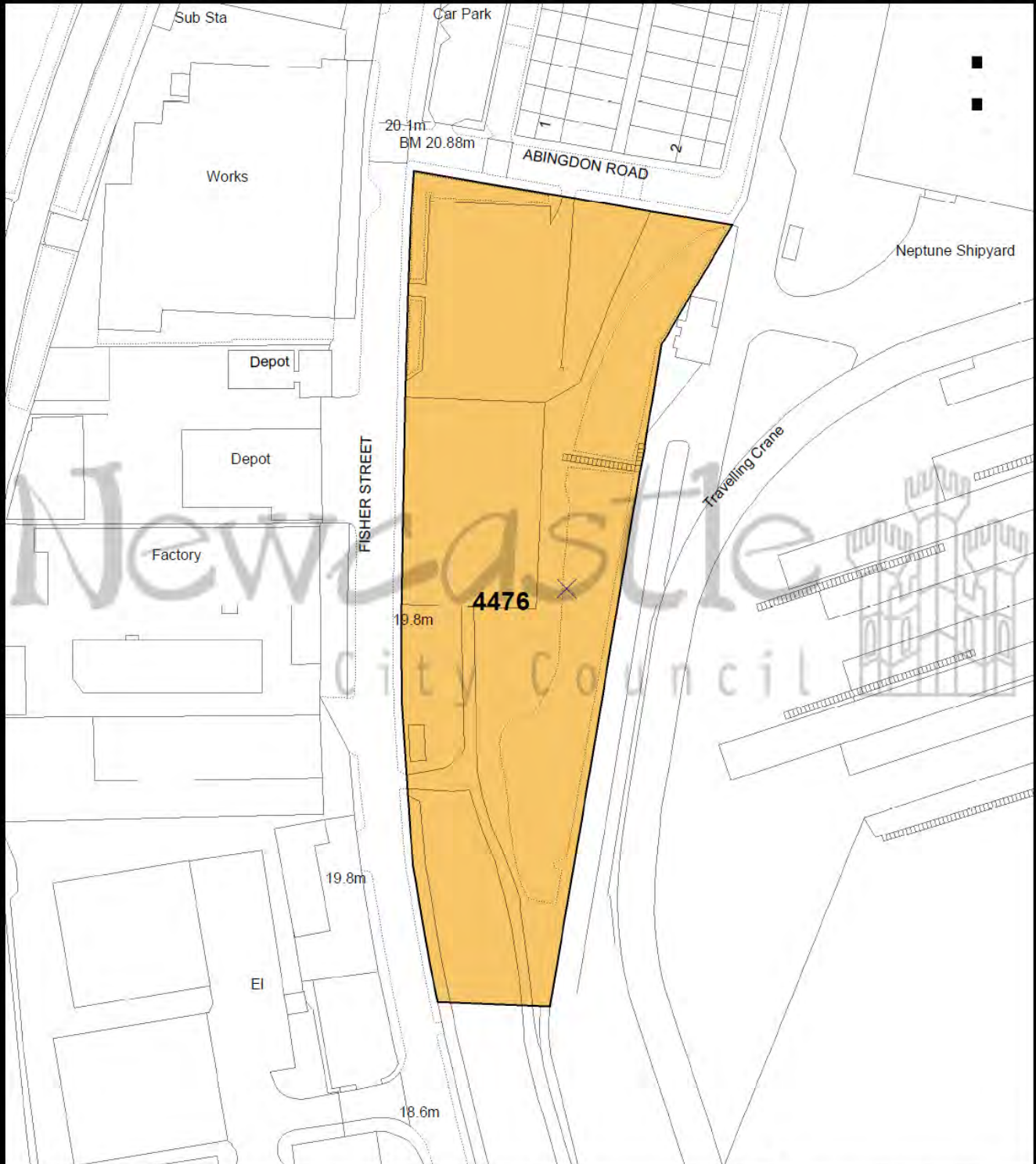
Paul Herbertson
Director of Resources & Performance
Environment & Regeneration

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5234 (ED3.1 (35)) Land at former Neptune Yard			
Area (hectares)	2.10ha			
Current Use	Office	Industrial	Mixed	Vacant (5)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	PDL. Site has undergone remediation works (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Neptune Energy Park (3)
	√	√		
Internal Environment	Good	Average	Poor	Site has undergone remediation works (3)
		√		
External Environment	Good	Average	Poor	Residential to the northern boundary. Not all of the site is developable – eastern boundary is on a steep gradient. (3)
		√		
Road Access	Good	Average	Poor	Walker Road provides access to the city centre and links to A19/Tyne Tunnel (4)
	√			
Public Transport	Good	Average	Poor	Average Accessibility Grade C (3)
	√			
Market Attractiveness	Good	Average	Poor	This site forms part of Neptune Energy Park, which has been identified as a Low Carbon Enterprise Zone and benefits from reduced business rates and other incentives. Neptune Energy Park is subject to a Local Development Order, which allows a simplified planning process to take place whereby there is no requirement for planning permission for purposes falling into B1, B2 and B8 use that is involved in marine offshore related industries and renewable energy low carbon manufacturing uses.(5)
	√			
Overall Assessment	Good	Average	Poor	Site is likely to come forward in the short term(5)
	√			

TOTAL SCORE	34
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Land at junction of Abingdon Road and Fisher Street**

Area (ha) : **0.97**

Map : **NZ 2965 SE**

Harvey Emms, B A (Hons), M.R.T.P.I, Head of Planning & Transportation
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Tel: 0191 232 8520
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Scale : **1:1,250**

Date : **15/08/2007**

Drawn by : **AM**

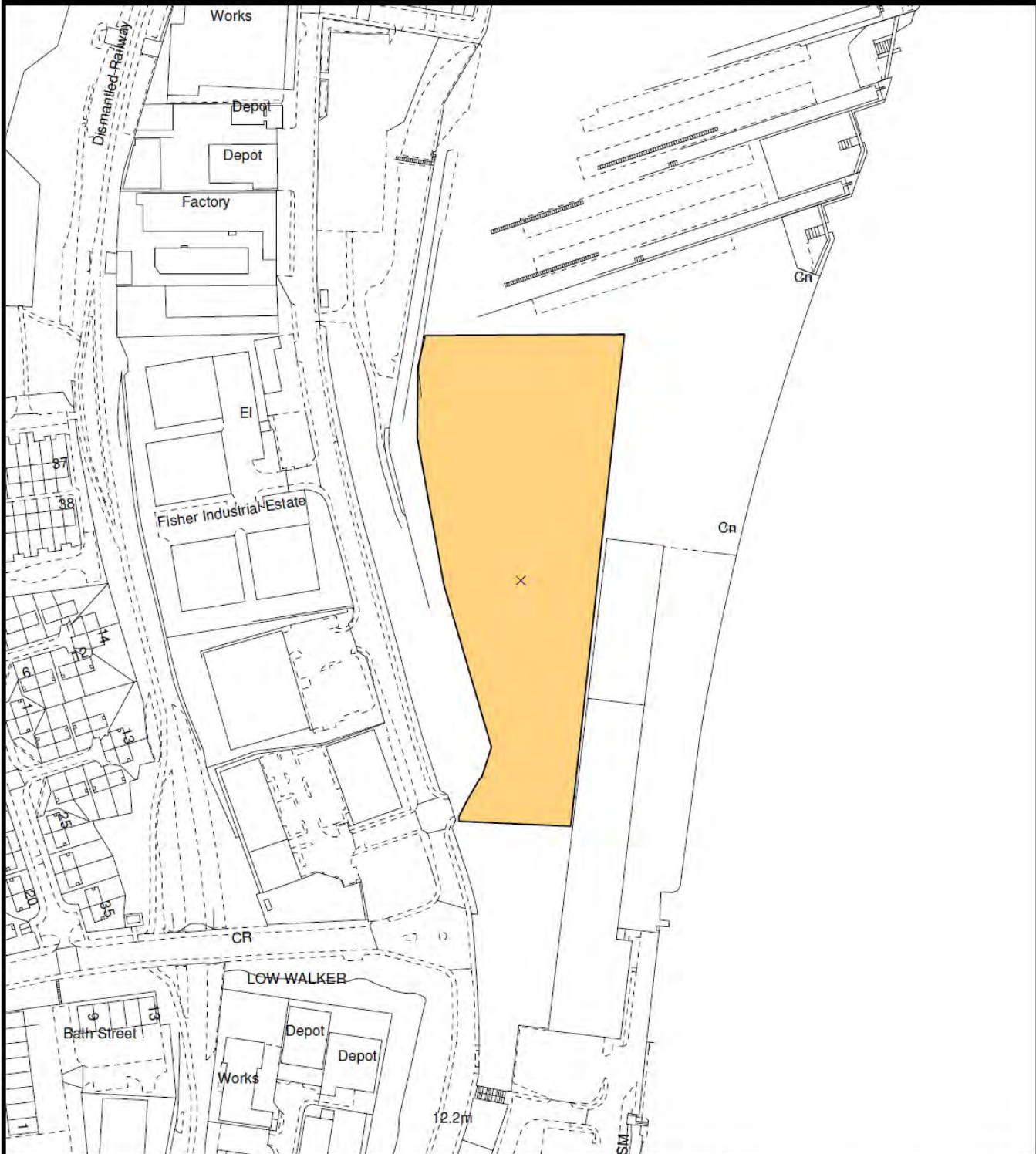
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4476 (ED3.1 (35)) Land at junction of Abingdon Road and Fisher Street			
Area (hectares)	1.67haha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant – former dry docks (5)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	PDL. Site has undergone remediation works (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Neptune Energy Park (3)
	√	√		
Internal Environment	Good	Average	Poor	Site has undergone remediation works (3)
		√		
External Environment	Good	Average	Poor	Residential to the western boundary (2)
		√		
Road Access	Good	Average	Poor	Walker Road provides access to the city centre and links to A19/Tyne Tunnel (4)
	√			
Public Transport	Good	Average	Poor	Average Accessibility Grade C (3)
	√			
Market Attractiveness	Good	Average	Poor	This site forms part of Neptune Energy Park, which has been identified as a Low Carbon Enterprise Zone and benefits from reduced business rates and other incentives. Neptune Energy Park is subject to a Local Development Order, which allows a simplified planning process to take place whereby there is no requirement for planning permission for purposes falling into B1, B2 and B8 use that is involved in marine offshore related industries and renewable energy low carbon manufacturing uses.(5)
	√			
Overall Assessment	Good	Average	Poor	Site is likely to come forward in the short term(5)
	√			

TOTAL SCORE | 34

(Scoring: 5 = best, 1 = worst)



Shepherds Offshore land on
Address : former Neptune Yard off
Fisher Street

Area (ha) :1.67

Map :2965 SE

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Scale : 1:2,500

Date :10/01/2013

Drawn by : DMH

Paul Herbertson
Director of Resources & Performance
Environment & Regeneration

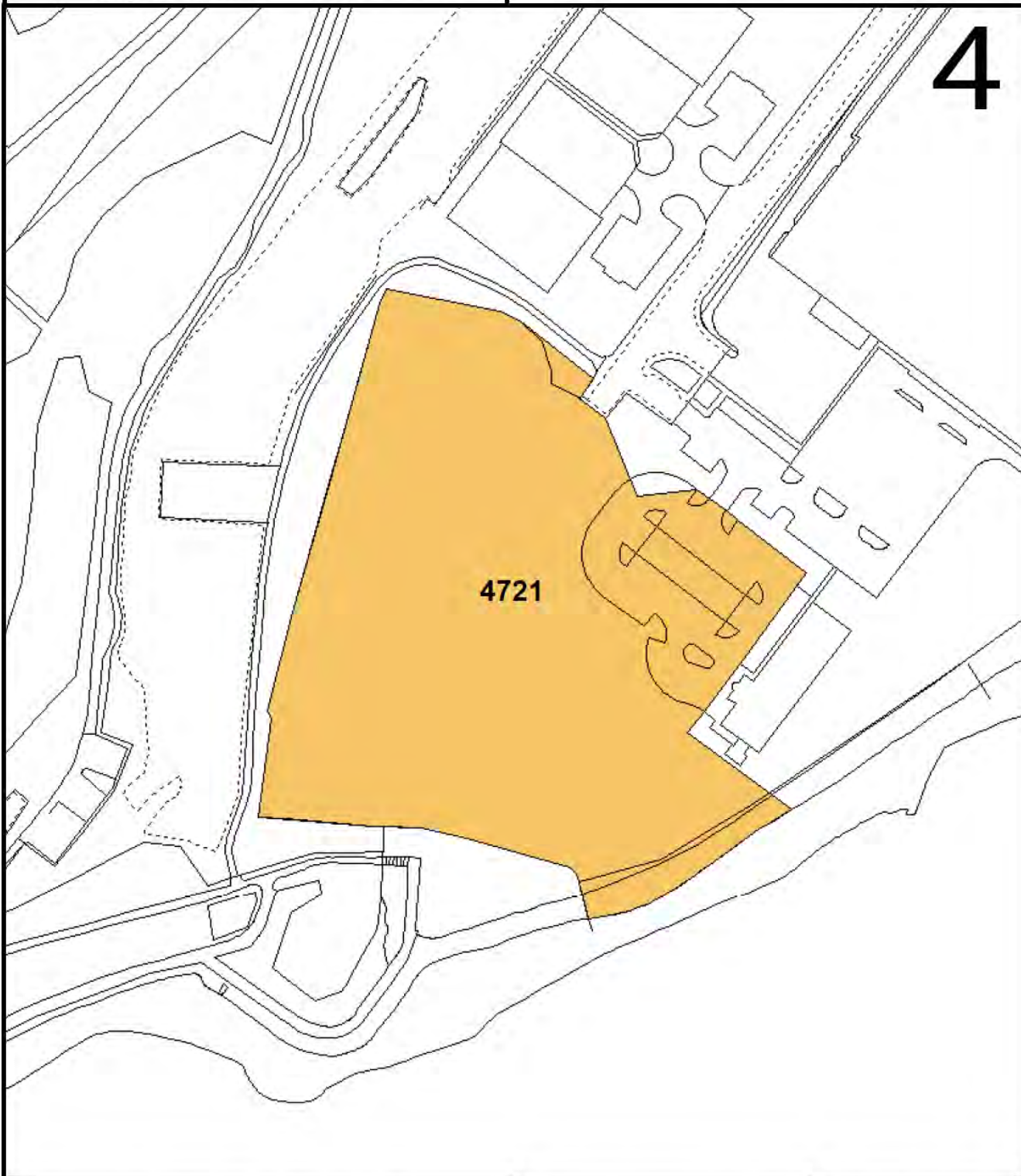
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5253 (ED3.1 (35)) Land at junction of Abingdon Road and Fisher Street			
Area (hectares)	1.67ha			
Current Use	Office	Industrial	Mixed	Vacant (5)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	PDL. Site has undergone remediation works (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Neptune Energy Park (3)
	√	√		
Internal Environment	Good	Average	Poor	Site has undergone remediation works (3)
		√		
External Environment	Good	Average	Poor	Residential to the western boundary (2)
		√		
Road Access	Good	Average	Poor	Walker Road provides access to the city centre and links to A19/Tyne Tunnel (4)
	√			
Public Transport	Good	Average	Poor	Average Accessibility Grade C (3)
	√			
Market Attractiveness	Good	Average	Poor	This site forms part of Neptune Energy Park, which has been identified as a Low Carbon Enterprise Zone and benefits from reduced business rates and other incentives. Neptune Energy Park is subject to a Local Development Order, which allows a simplified planning process to take place whereby there is no requirement for planning permission for purposes falling into B1, B2 and B8 use that is involved in marine offshore related industries and renewable energy low carbon manufacturing uses.(5)
	√			
Overall Assessment	Good	Average	Poor	Site is likely to come forward in the short term(5)
	√			

TOTAL SCORE | 34

(Scoring: 5 = best, 1 = worst)

4



Address : **Wellstream Naval Yard
Wincomblee Road**

Area (Ha) : **1.77**

Map : **NZ 2963 SW**

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Scale : 1:1,500 @ A4

Date of
Publication: 12/03/2009

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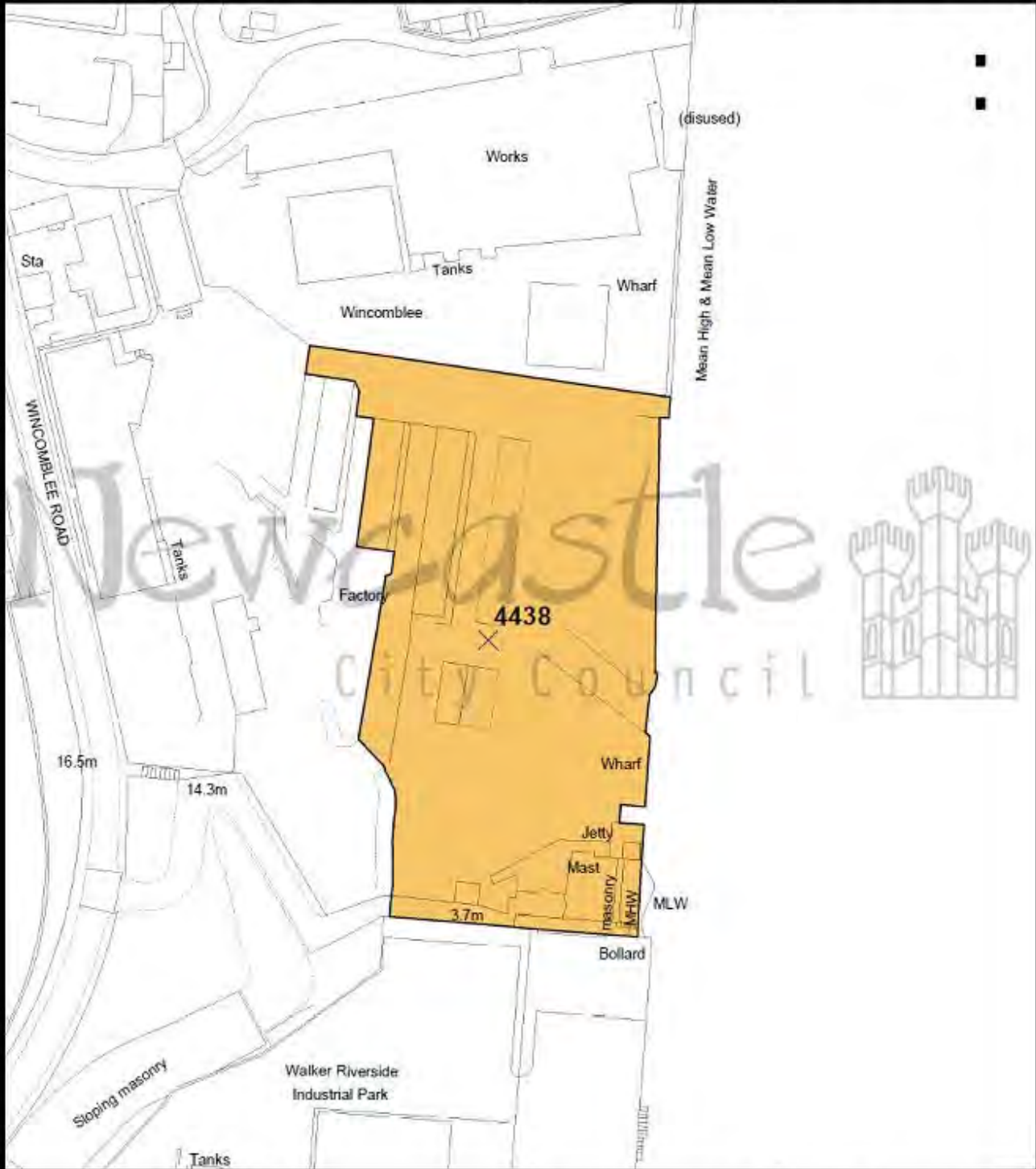
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4721 (ED3.1 (35)) Wellstream Naval Yard			
Area (hectares)	1.77ha			
Current Use	Office	Industrial	Mixed	Former Parsons Works – cleared sites (5)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant plot (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Available (3)
	√	√		
Internal Environment	Good	Average	Poor	Accessibility, servicing and circulation would have to be improved as part of redevelopment. (3)
		√		
External Environment	Good	Average	Poor	This part of Walker Riverside is dominated by two production companies. To the west and south is Walker Riverside Park. (2)
		√		
Road Access	Good	Average	Poor	Walker Road provides access to the city centre and links to A19/Tyne Tunnel (4)
	√			
Public Transport	Good	Average	Poor	Average Accessibility Grade C (3)
	√			
Market Attractiveness	Good	Average	Poor	Attractive location for supply chain industries (5)
	√			
Overall Assessment	Good	Average	Poor	Site is likely to come forward in the short term(5)
	√			

TOTAL SCORE | 34

(Scoring: 5 = best, 1 = worst)



Address : Dobson's Yard
Wincomblee Road
Walker Riverside

Area (ha) : 0.85

Map : NZ 2964 SE

Harvey Emms, B A (Hons), M.R.T.P.I., Head of Planning & Transportation
Newcastle City Council, Civic Centre, Newcastle upon Tyne NE1 8PH

Tel: 0191 232 8520
Fax: 0191 211 4998

Scale : 1:1,250

Date : 15/06/2007

Drawn by : AM

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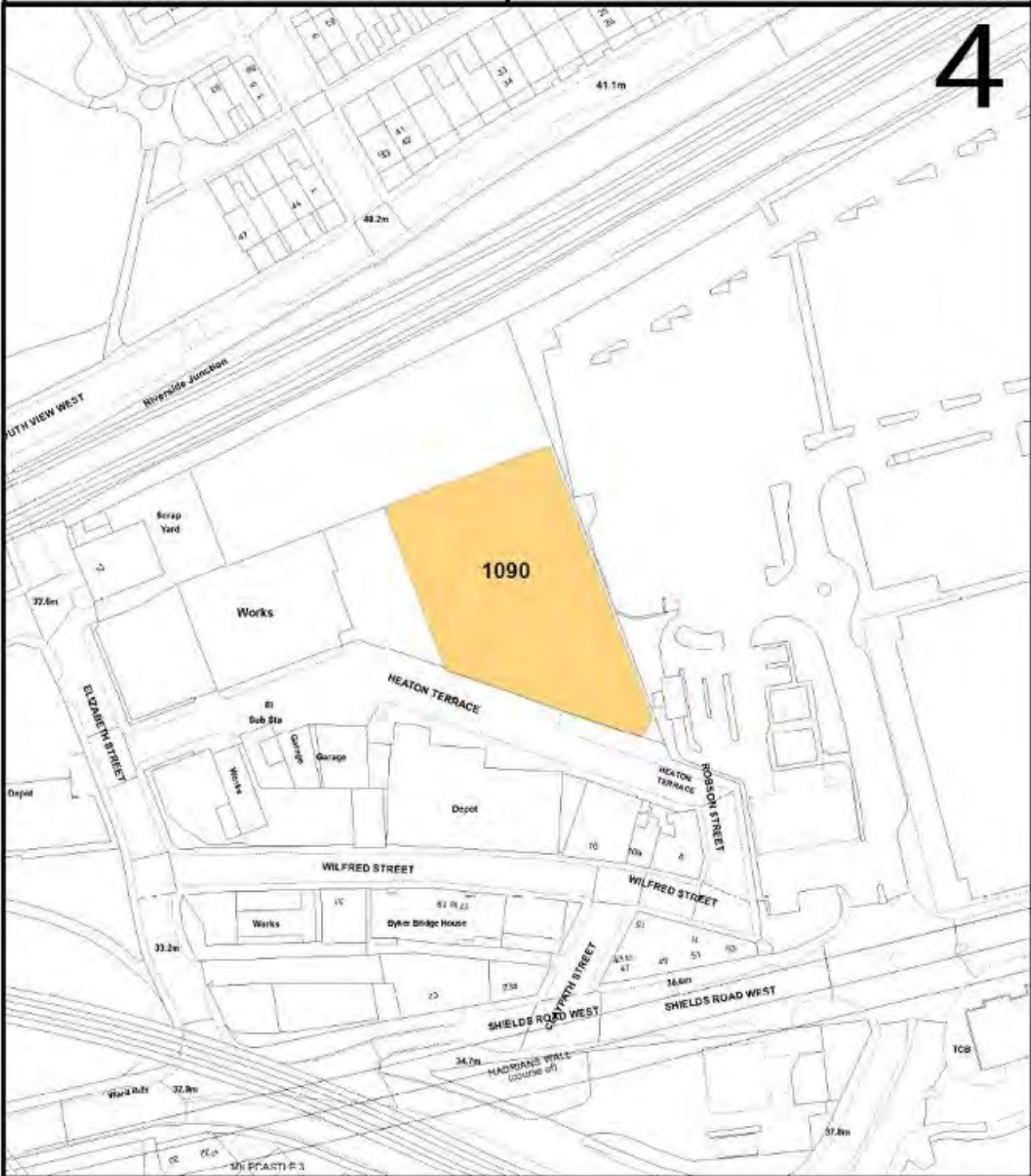
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4438: Dobson's Yard, Wincomblee Road			
Area (hectares)	0.85ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant / derelict site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated under UDP Policy ED3.2 (35) for B2 uses. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant site. (3)
		√	√	
Internal Environment	Good	Average	Poor	Contaminated, landlocked site, issues with quay wall to the eastern extremity. EA Flood Zone 3. (2)
			√	
External Environment	Good	Average	Poor	B2 uses. (3)
		√		
Road Access	Good	Average	Poor	Poor access via forge works only. (2)
			√	
Public Transport	Good	Average	Poor	Poor accessibility: Grade D 55,000+ economically active people within 30 minutes of site by public transport. (2)
			√	
Market Attractiveness	Good	Average	Poor	Issues around contamination and land stability place heavy doubts over the viability of bringing the site forward. Funding could come from LTP, Single Programme, ring fenced funding and possible private finance. (2)
			√	
Overall Assessment	Good	Average	Poor	Needs significant ground works / investment. Unlikely to come forward until the Neptune Yard has been developed. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



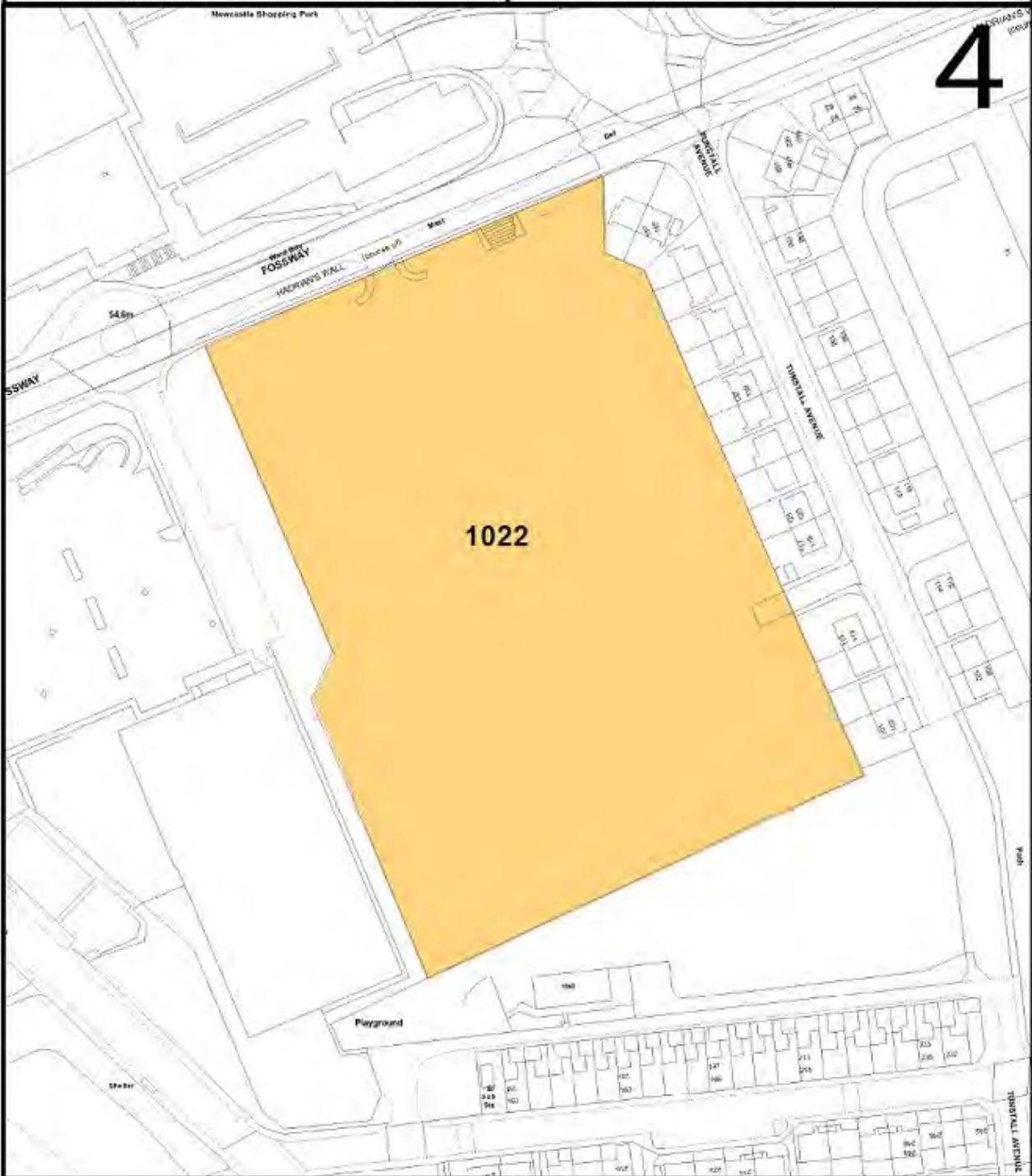
<p>Address : Heaton Terrace Shields Road West</p>	<p>Area (Ha) : 0.25</p>	<p>Map : NZ 2664 NW</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
<p>Scale : 1:1,250 @ A4</p>	<p>Date of Publication: 17/03/2010</p>	<p>© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009 Drawn By: J McLaughlin</p>

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1090: Heaton Terrace			
Area (hectares)	0.25ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant, brownfield site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for industrial use under ED3.1 (31) Shields Road West. (2)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant brownfield site, used as hardstanding area. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Flat, level site. (3)
		√		
External Environment	Good	Average	Poor	Morrisons to the east, industrial units to the west and south. (3)
		√		
Road Access	Good	Average	Poor	From Heaton Terrace only. (3)
		√		
Public Transport	Good	Average	Poor	Shields Road close by, with good bus links. (3)
		√		
Market Attractiveness	Good	Average	Poor	Very limited scope for B1, B2 or B8. (2)
			√	
Overall Assessment	Good	Average	Poor	Shields Road retail centre is performing poorly. ED3.1 (31) recommended for de-allocation as it is no longer fit for purpose. (2)
			√	

TOTAL SCORE	24
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Former IRDL
Fossway**

Area (Ha) : 2.5

Map : NZ 2764 NE
NZ 2765 SE

Harvey Emms, B. A (Hons), M.R.T.P.I.,
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Scale : 1:1,500 @ A4

Date of
Publication: 17/03/2010

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Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1022: Former IRDL Site, Fossway			
Area (hectares)	5.96ha			
Current Use	Office	Industrial	Mixed	Cleared site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for employment use under UDP Policy ED3.1 (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Cleared site. Landowner negotiating with developer to bring the site forward for mixed use development.(3)
	√	√	√	
Internal Environment	Good	Average	Poor	Cleared unconstrained site. (3)
		√		
External Environment	Good	Average	Poor	Newcastle Shopping Park, employment uses, residential. (3)
		√		
Road Access	Good	Average	Poor	Via the Fossway. (3)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade A. (5)
		√		
Market Attractiveness	Good	Average	Poor	Public sector intervention anticipated to bring the site forward. (4)
		√		
Overall Assessment	Good	Average	Poor	The Council's Urban Design team are preparing a strategic framework for the Fossway Development Area. The likelihood is that the site won't come forward for employment use. (2)
			√	

TOTAL SCORE	29
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



<p>Address : Sandy Lane Brunswick Industrial Estate</p>	<p>Area (Ha) : 1.12</p>	<p>Map : NZ 2272 NE</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
<p>Scale : 1:1,500 @ A4</p>	<p>Date of Publication: 17/03/2010</p>	<p>© Crown copyright. All rights reserved, Newcastle City Council, 100019569, 2009. Drawn By: J McLaughlin</p>

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	2703: Sandy Lane, Brunswick Industrial Estate			
Area (hectares)	1.12 ha	Comments & Score (out of 5)		
Current Use	Office	Industrial	Mixed	Cleared, former industrial estate. (3)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Site is allocated under UDP3.1 (8) for B2 use. (4)
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Cleared site available for development. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Airport flight path. (3)
		√		
External Environment	Good	Average	Poor	Predominantly B2 and B8 uses, Green Belt and Newcastle International Airport. (2)
		√		
Road Access	Good	Average	Poor	Via Hartley Road and main estate roads. (3)
		√		
Public Transport	Good	Average	Poor	Grade D: Poor - 45,000 economically active people within 30 minutes of site by public transport. (2)
			√	
Market Attractiveness	Good	Average	Poor	Above average vacancies at Brunswick Estate. (2)
		√		
Overall Assessment	Good	Average	Poor	Unlikely to come forward until Ruby Park has been fully let and lettings across the site are taken up. (2)
		√		

TOTAL SCORE	24
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Newburn Haugh Allotments

Area (ha) : 1.89

Map : NZ 1864 NW
NZ 1864 SW

Harvey Emms, B A (Hons), M.R.T.P.I, Head of Planning & Transportation
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Tel: 0191 232 8520
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Scale : 1:2,000

Date : 31/05/2007

Drawn by : AM

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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

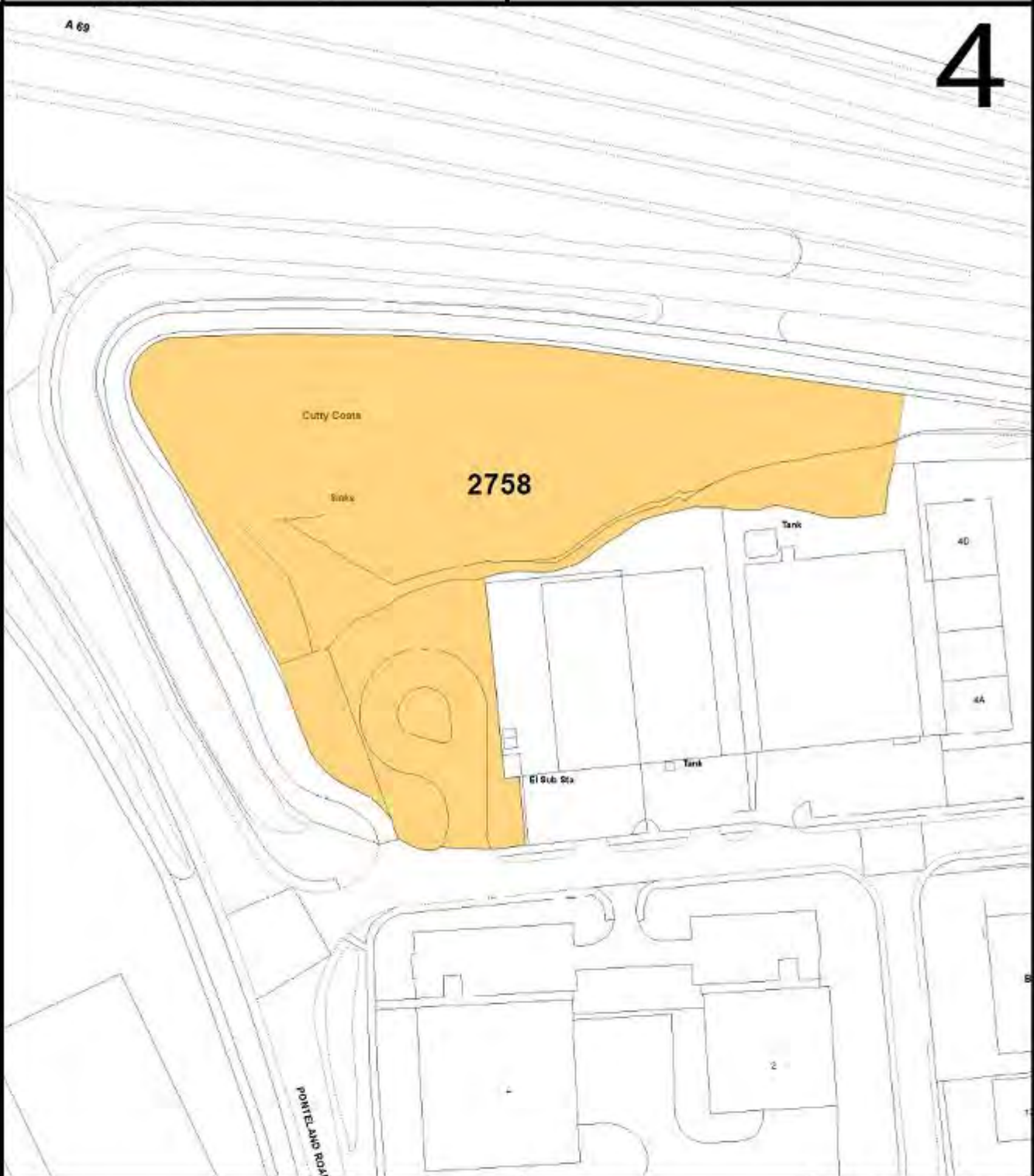
Site Reference & Address	2804: Newburn Haugh Allotments			
Area (hectares)	1.89ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant land. Land set considerably lower than neighbouring commercial use of Land Rover and possible conflict with scale of building in relation to higher ground level. (2)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant site, available for development subject to land owner bringing site forward. (3)
			√	
Internal Environment	Good	Average	Poor	Slopes from north west to south east. Site is surrounded by a wall and hoarding, access could not be achieved. (3)
			√	
External Environment	Good	Average	Poor	Sandwiched between 3360 and 3359. (vacant site and caravan storage). Possible conflict with adjacent Lemington Cone Grade 2* Listed Building. (2)
Road Access	Good	Average	Poor	Access to site is poor. (1)
			√	
Public Transport	Good	Average	Poor	Average public accessibility: Grade C (3)
		√		
Market Attractiveness	Good	Average	Poor	Constrained access, could come forward via land assembly with 3360 and 3359. Unlikely to be attractive to the market. (3)
			√	
Overall Assessment	Good	Average	Poor	Not a serious likelihood of industrial use and the site is unsuitable for offices. Site may be better suited to housing but there are viability issues. (2)
		√		

TOTAL SCORE	22
--------------------	----

(Scoring: 5 = best, 1 = worst)

469

4



Address : **Cutty Coats
Throckley Industrial Estate**

Area (Ha) : **1.12**

Map : NZ 1567 SE

Harvey Emms, B. A (Hons), M.R.T.P.I.,
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Scale : 1:1,250 @ A4

Date of
Publication: 17/03/2010

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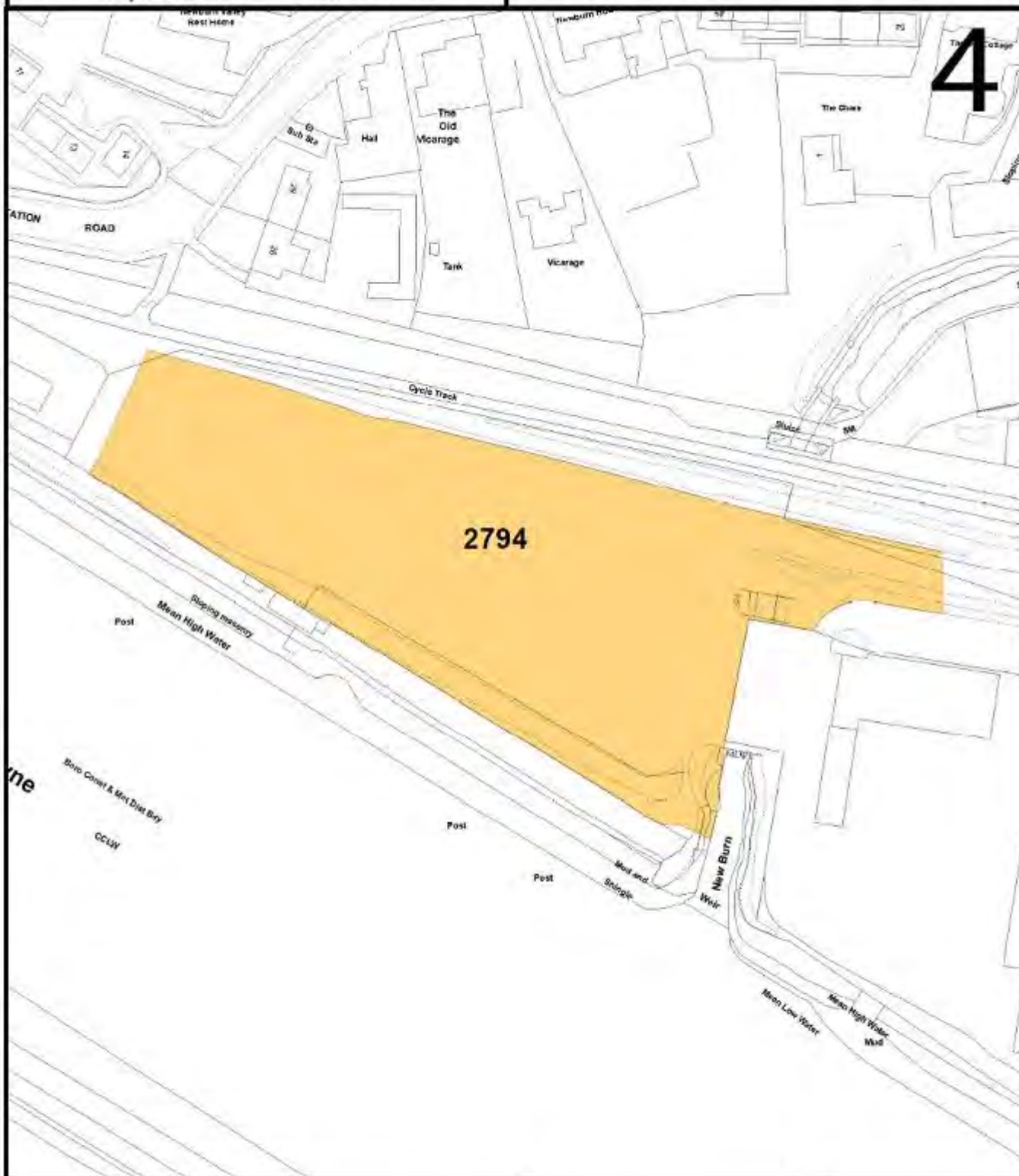
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2010
Individual Site Inspection Pro forma**

Site Reference & Address	2758: Cutty Coats, Throckley Industrial Estate		
Area (hectares)	1.12ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
	N/A	N/A	N/A
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
	√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
			√
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		
Generally flat site, bounded by slight embankment to the north, south and west by extensive tree cover. Site access improvements required. (3)			
Principally B8/B2 uses. Walbottle Dene SNCI to the west of the site. (3)			
Adjacent to A69 dual carriageway. (3)			
Poor: Grade D 36,000+ economically active people within 30 minutes of site by public transport. (2)			
Developer interest has been shown to develop the eastern portion of the site. (4)			
Site is part of Throckley Industrial Estate which continues to trade well despite the down turn in market conditions. (4)			

TOTAL SCORE	33
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(Scoring: 5 = best, 1 = worst)



Address : Shelly Road Newburn Industrial Estate	Area (Ha) : 1.01	Map : NZ 1665 SE
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Harvey Emms, B. A (Hons), M.R.T.P.I.,
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 Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998

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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	2794: Shelley Road, Newburn Industrial Estate			
Area (hectares)	1.01 ha			
Current Use	Office	Industrial	Mixed	Vacant site, former rail land. (4)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated under UDP Policy ED3.1 (19) for industrial use. (5)
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Planning permission granted (2009/0720/01/DET) for industrial. (4)
	√			
Internal Environment	Good	Average	Poor	Level site, tree cover to all boundaries. Access to pumping station needs to be resolved. (3)
		√		
External Environment	Good	Average	Poor	Hadrian's cycleway to the northern boundary. Wildlife corridor. SNCI close by. (3)
		√		
Road Access	Good	Average	Poor	Quite remote, access to the City Centre via Newburn Road. (3)
		√		
Public Transport	Good	Average	Poor	Public transport accessibility grade D.(2)
			√	
Market Attractiveness	Good	Average	Poor	Developer interest has been shown to develop the eastern portion of the site. (4)
	√			
Overall Assessment	Good	Average	Poor	Site is part of Newburn Industrial Estate which continues to trade well despite the down turn in market conditions. (4)
	√			

TOTAL SCORE	32
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Lemington Caravan Site
Riversdale Way

Area (ha) : 1.70

Map : NZ 1864 SW

Harvey Emms, B A (Hons), M.R.T.P.I, Head of Planning & Transportation
Newcastle City Council, Civic Centre, Newcastle upon Tyne NE1 8PH

Tel: 0191 232 8520
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Scale : 1:1,500

Date : 31/05/2007

Drawn by : AM

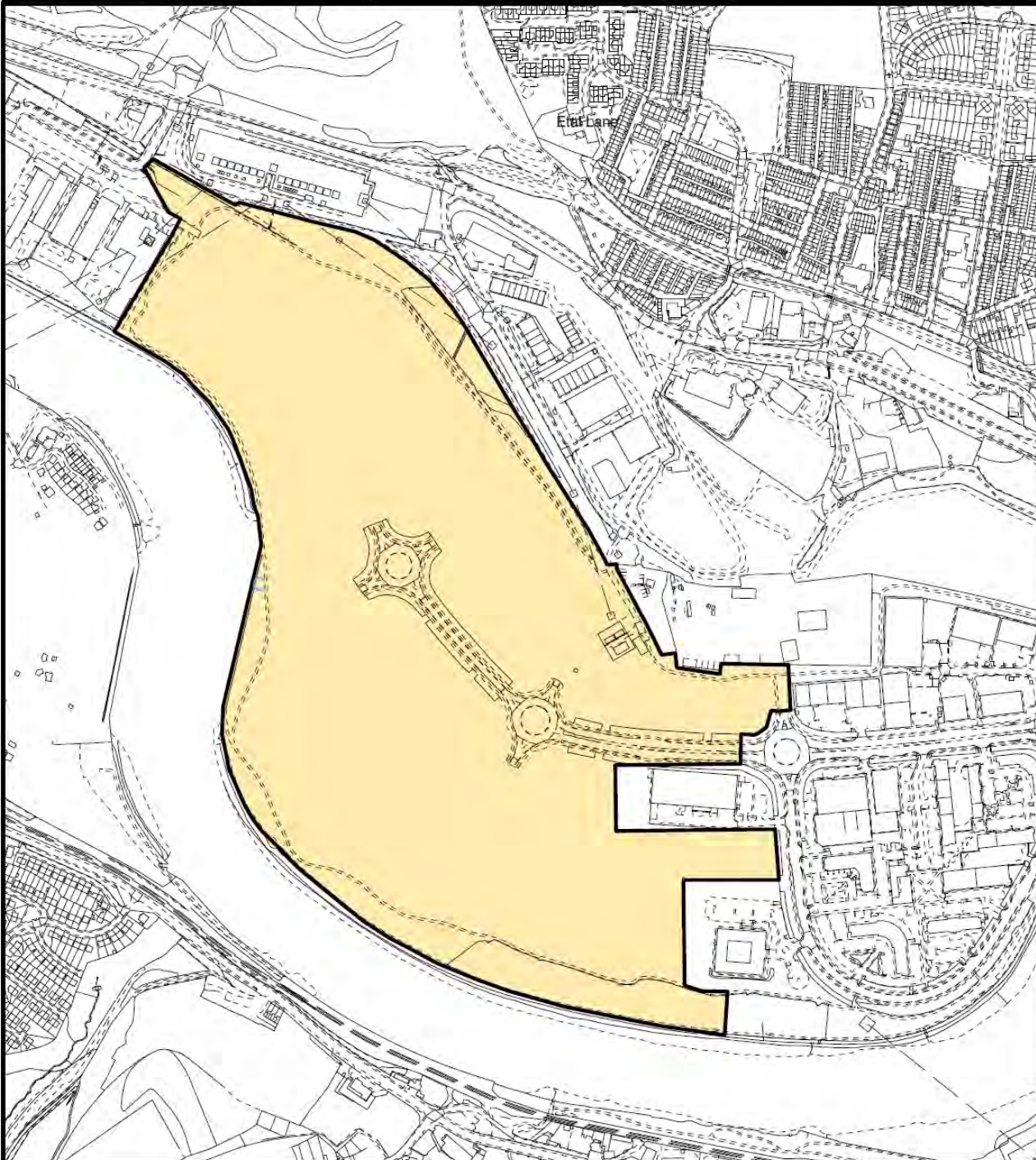
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3360: Former Caravan Site			
Area (hectares)	1.70ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Caravan storage site. (1)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Surrounded by employment uses could be used for B2 / B8. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Existing occupier would need to be decanted. (2)
		√	√	
Internal Environment	Good	Average	Poor	Gentle slope from north west to south east. (3)
			√	
External Environment	Good	Average	Poor	Adjacent to Tarmac plant. (2)
Road Access	Good	Average	Poor	Good via Riversdale Way. Inaccessible from main road network and access serving Land Rover. (2)
			√	
Public Transport	Good	Average	Poor	Average public accessibility: Grade C. (3)
		√		
Market Attractiveness	Good	Average	Poor	Low value for current use. Good location for B2 starter units but unlikely to come forward. (3)
			√	
Overall Assessment	Good	Average	Poor	Could come forward via land assembly with 3360 and 3359. Unlikely to be attractive to the market. (3)
		√		

TOTAL SCORE	22
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Newburn Haugh

Map: 1864SW
1863NW
1764NE, SE

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Scale : 1:7,000

Date: 21/05/13

Drawn by : DMH

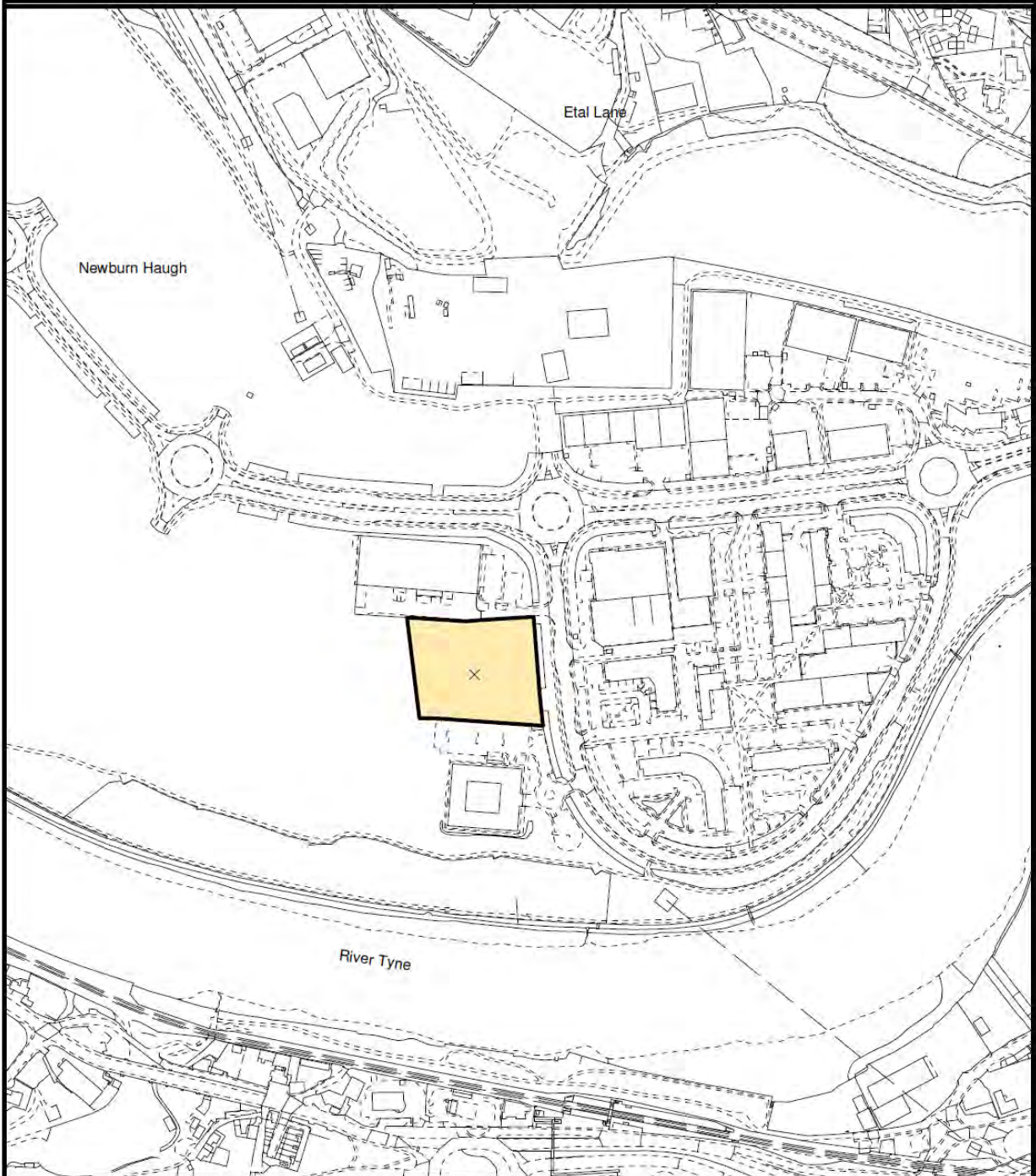
Paul Herbertson
Director of Resources & Performance
Environment & Regeneration

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	2802: Newburn Riverside			
Area (hectares)	51.33ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Remaining employment land is vacant PDL. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Surrounded by employment uses could be used for B2 / B8. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Site to come forward for housing (1)
	N/A	N/A	N/A	
Internal Environment	Good	Average	Poor	The site has adoptable roads serving the development, which also include foul and surface water drainage, water, gas, electricity and telecom services. (3)
		√		
External Environment	Good	Average	Poor	Adjacent to housing and employment uses. (2)
Road Access	Good	Average	Poor	Via Newburn Bridge. Possible capacity issues..(2)
			√	
Public Transport	Good	Average	Poor	The site has no score on the Public Transport Accessibility Model. However, adjacent sites are Grade C.(2)
			√	
Market Attractiveness	Good	Average	Poor	Low value for current use. Good location for B2 starter units but unlikely to come forward. (3)
			√	
Overall Assessment	Good	Average	Poor	Could come forward via land assembly with 3360 and 3359. Unlikely to be attractive to the market. (3)
		√		

TOTAL SCORE	22
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Newburn
SHLAA & SLR

HA: 1.12

Map: 1863NW

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Scale : 1:5,000

Date: 19/06/2013

Drawn by : DMH

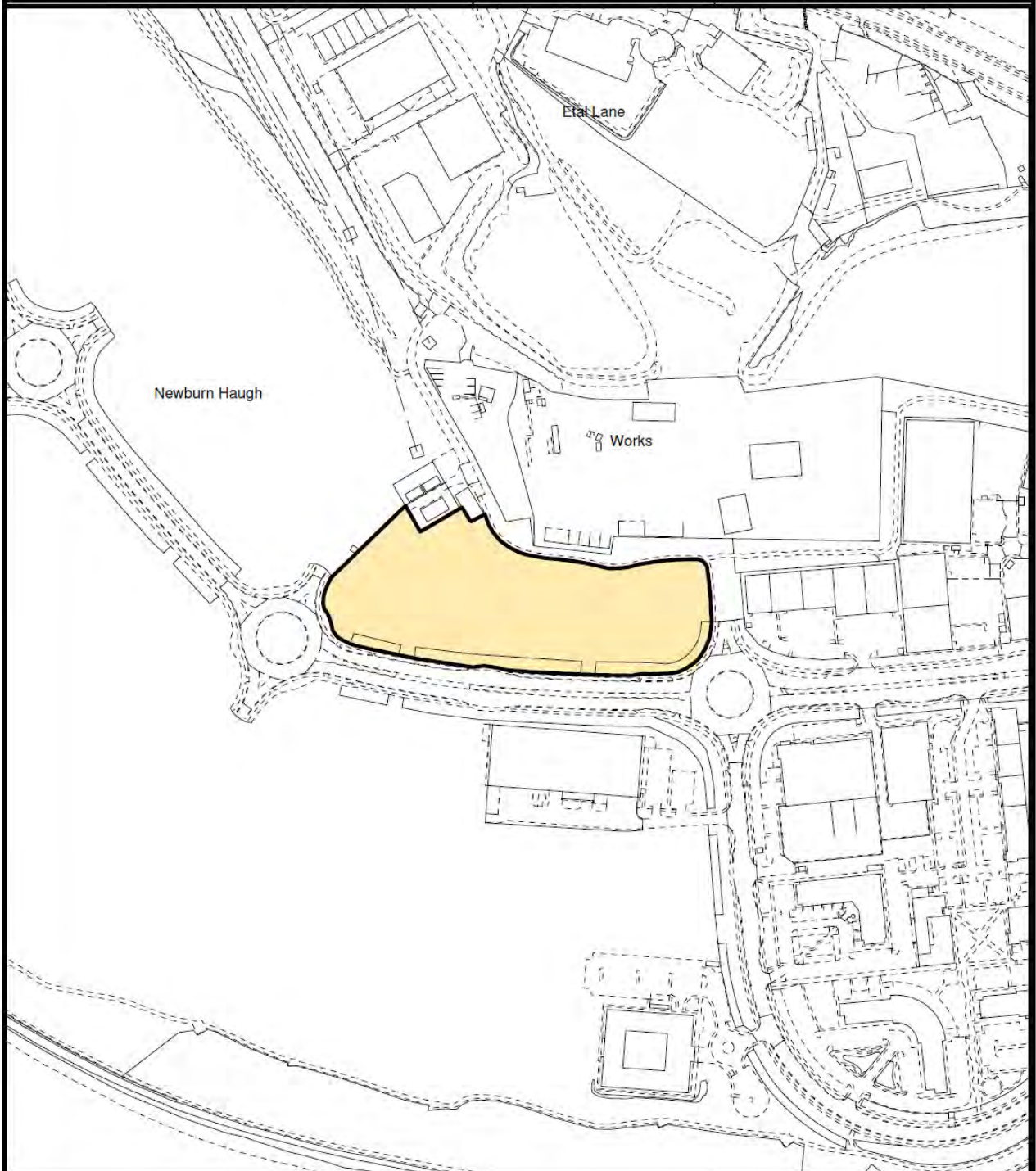
Paul Herbertson
Director of R & P

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5320: Goldcrest Way, Newburn Riverside			
Area (hectares)	1.12ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Brownfield site (Good 5)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant brownfield (Good 5).
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Short term (5).
	√			
Internal Environment	Good	Average	Poor	No obstacle (5).
External Environment	Good √	Average	Poor	Adjacent to completed office/employment development (Newburn Haugh) and a future office development/light industrial site (site 5322) (4)
Road Access	Good	Average √	Poor	Via Goldcrest Way off Kingfisher Boulevard which links to Scotswood Road (3)
Public Transport	Good	Average	Poor √	Public Transport Accessibility Grade D. (2).
Market Attractiveness	Good	Average	Poor √	Viability affected by the recession. Subject to market conditions improving (Poor 2)
Overall Assessment	Good √	Average	Poor	The site is suitable and available for employment use (4).

TOTAL SCORE	35
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(Scoring: 5 = best, 1 = worst)



Address : Newburn
SHLAA & SLR

HA: 2.54

Map: 1864SW

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Scale : 1:4,000

Date: 19/06/2013

Drawn by : DMH

Paul Herbertson
Director of R & P

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5321: Kingfisher Boulevard North, Newburn Riverside			
Area (hectares)	2.54ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Brownfield site (Good 5)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant brownfield (Good 5).
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Short term (5).
	√			
Internal Environment	Good	Average	Poor	No obstacle (5).
External Environment	Good	Average	Poor	Adjacent to cement works and existing office/employment uses (Newburn Haugh) (3)
		√		
Road Access	Good	Average	Poor	Via Kingfisher Boulevard which links to Scotswood Road (3)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2).
			√	
Market Attractiveness	Good	Average	Poor	Viability affected by the recession. Subject to market conditions improving (Poor 2)
			√	
Overall Assessment	Good	Average	Poor	The site is suitable and available for employment use (4).
	√			

TOTAL SCORE	34
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Newburn
SHLAA & SLR

HA: 5.67

Map: 1863NW

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Scale : 1:5,000

Date: 19/06/2013

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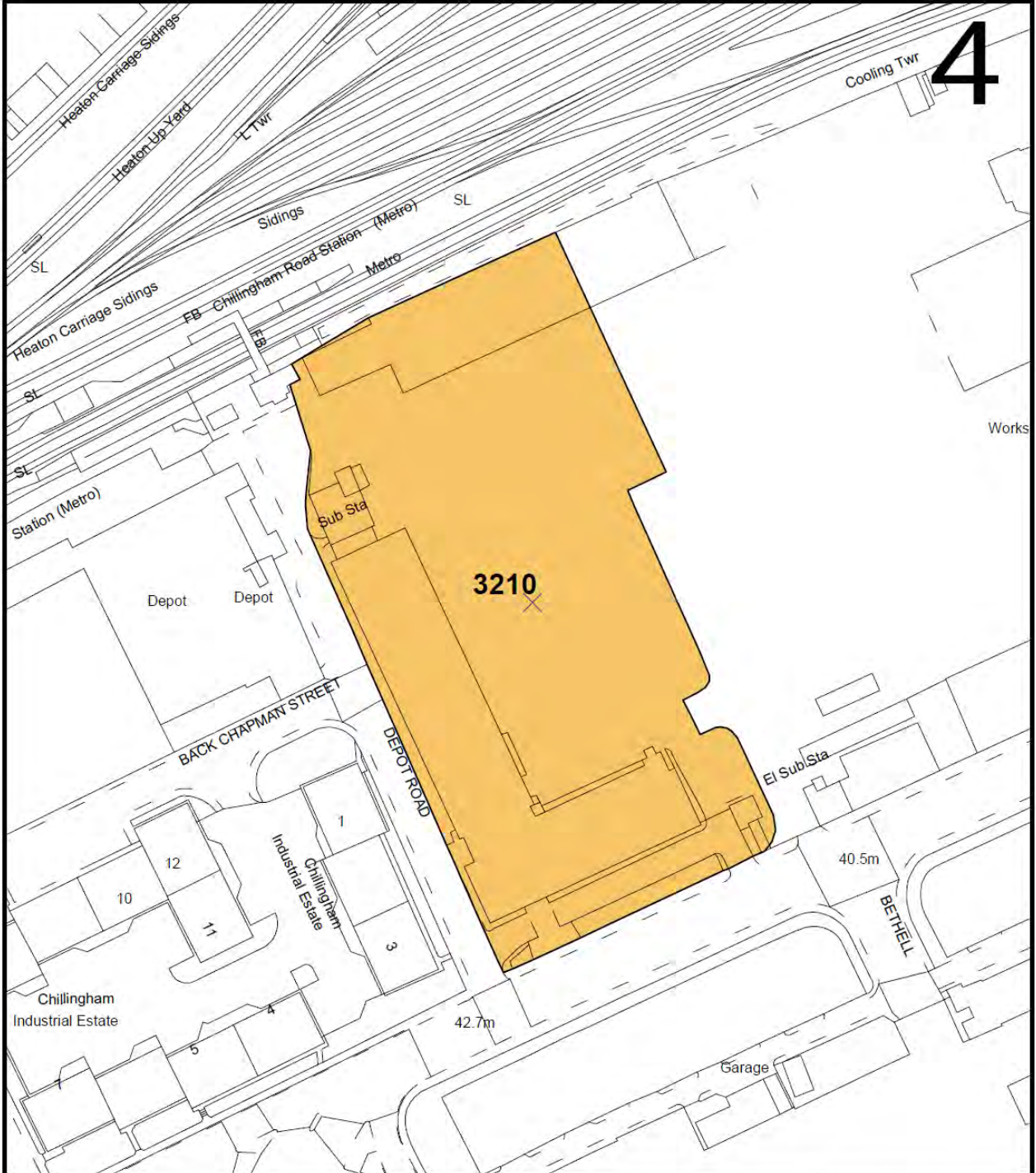
Paul Herbertson
Director of R & P

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5322: Kingfisher Boulevard South, Newburn Riverside			
Area (hectares)	5.67ha			
Current Use	Office	Industrial	Mixed	Brownfield site (Good 5)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant brownfield (Good 5).
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Short term (5).
	√			
Internal Environment	Good	Average	Poor	No obstacle (5).
External Environment	Good	Average	Poor	Adjacent to existing office/employment uses (Newburn Haugh). The site to the west is to come forward for housing (3)
		√		
Road Access	Good	Average	Poor	Via Kingfisher Boulevard which links to Scotswood Road (3)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2).
			√	
Market Attractiveness	Good	Average	Poor	Viability affected by the recession. Subject to market conditions improving (Poor 2)
			√	
Overall Assessment	Good	Average	Poor	The site is suitable and available for B1 and light industrial employment use (3).
		√		

TOTAL SCORE	28
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Land at Siemens North Site
Shields Road**

Area (Ha) : **1.18**

Map : **NZ 2765 SE**

**Harvey Emms, B. A (Hons), M.R.T.P.I.,
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Scale : 1:1,250 @ A4

Date of
Publication: 14/04/2008

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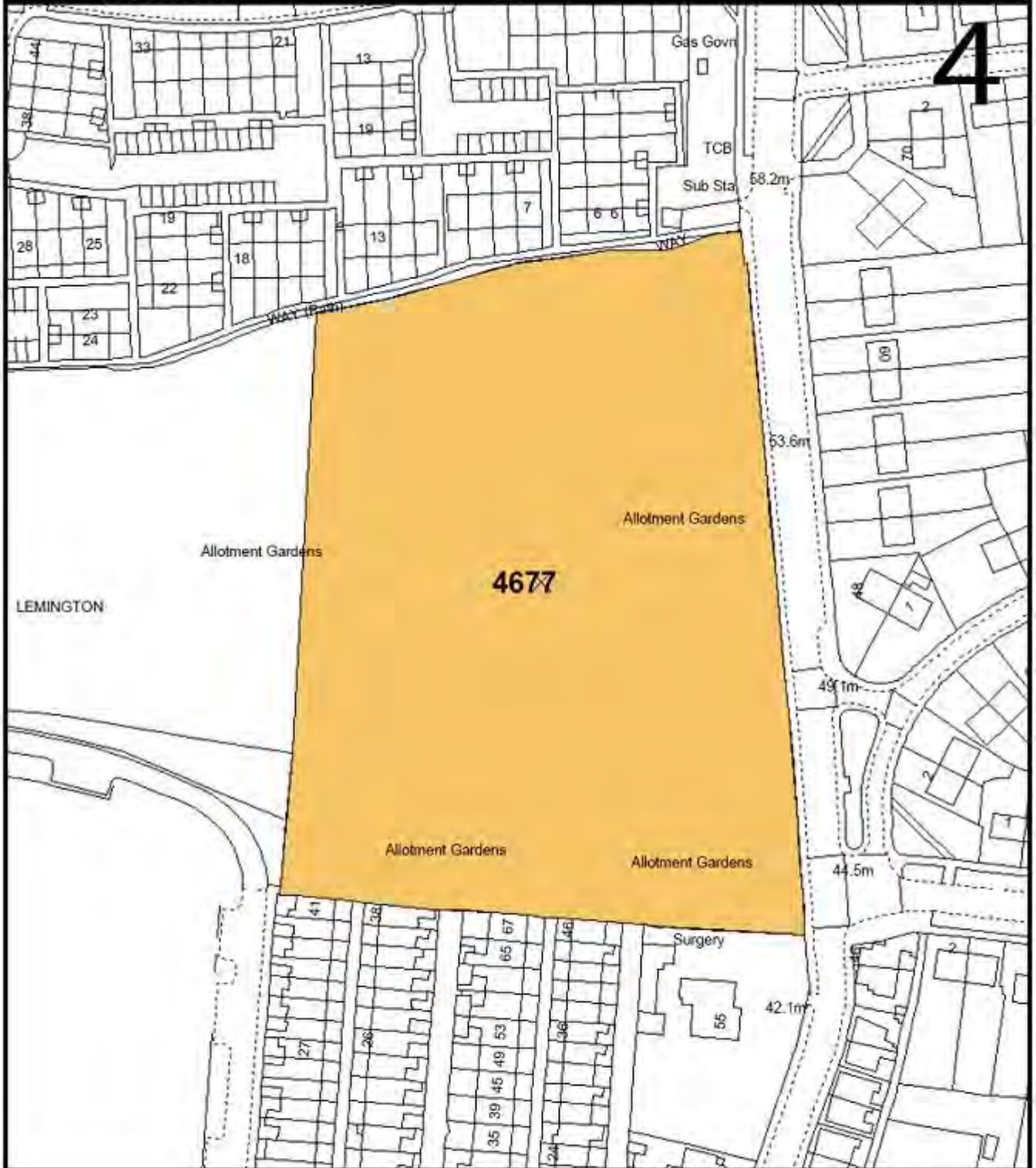
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3210: Land at Siemens North Site, Shields Road			
Area (hectares)	3.23ha			Comments
Current Use	Office	Industrial	Mixed	Large cleared site, former industrial site. (3)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Site allocated under ED3.1 (32) to be retained for employment use. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Flat site, no major topographical features. Ground contamination possible. (2)
		√		
External Environment	Good	Average	Poor	Industrial and retail parks. (3)
		√		
Road Access	Good	Average	Poor	Via Shields Road. Junction improvements required to facilitate redevelopment. (2)
		√		
Public Transport	Good	Average	Poor	Adjacent to Chillingham Road Metro. Accessibility Grade A (5).
		√		
Market Attractiveness	Good	Average	Poor	Council owned. Earmarked for disposal to Newcastle College. A quarter of the site is to be let to Nexus for 3 years to facilitate line repairs. Unlikely to come forward for employment use. (2)
		√		
Overall Assessment	Good	Average	Poor	The Council's Urban Design Team are preparing a strategic framework for the Fossway Development Area. This involves looking at the development blocks on the IRDL and the two Siemens sites, links between them, and to the surrounding area. Improvements to the highway network are crucial to this process. (3)
		√		

TOTAL SCORE	26
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(Scoring: 5 = best, 1 = worst)



Address : Lemington Allotments Union Hall Road	Area (Ha) : 1.79	Map : NZ 1865 SW/SE NZ 1864 NW/NE
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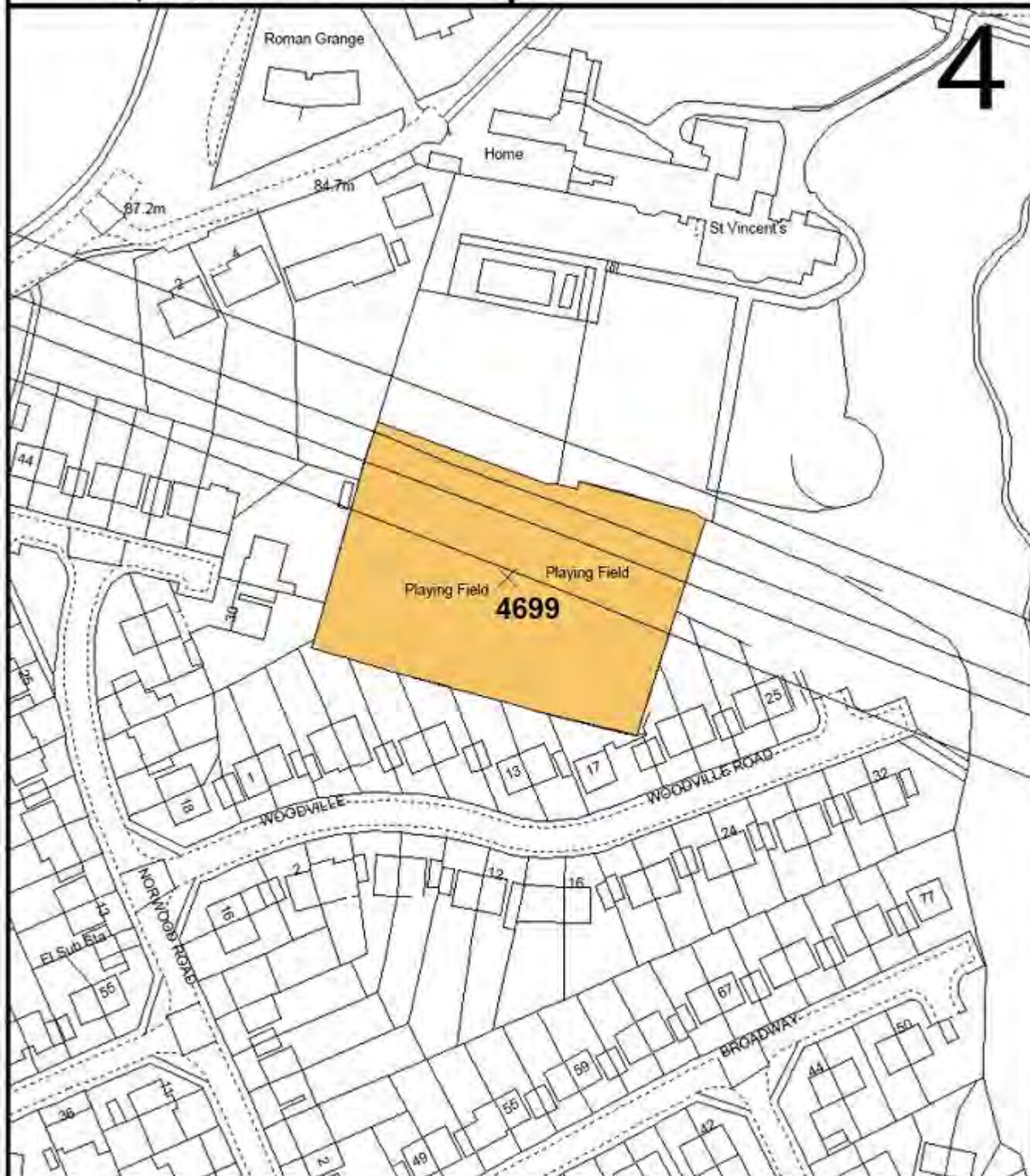
Scale : 1:1,250 @ A4	Date of Publication: 12/12/2008	Drawn by : A Mackenzie	© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2008.
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**Newcastle Employment Land Review 2010
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Site Reference & Address	4677: Lemington Allotments			
Area (hectares)	1.79ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated open space. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as allotment gardens. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Allotment gardens. (3)
		√		
External Environment	Good	Average	Poor	Residential to the south, east and west boundaries. (3)
		√		
Road Access	Good	Average	Poor	Via Quarry Road. (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated open space and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land south of St Vincents Home
Lemington

Area (Ha) : 0.45

Map : NZ 1865 NE
NZ 1965 NW

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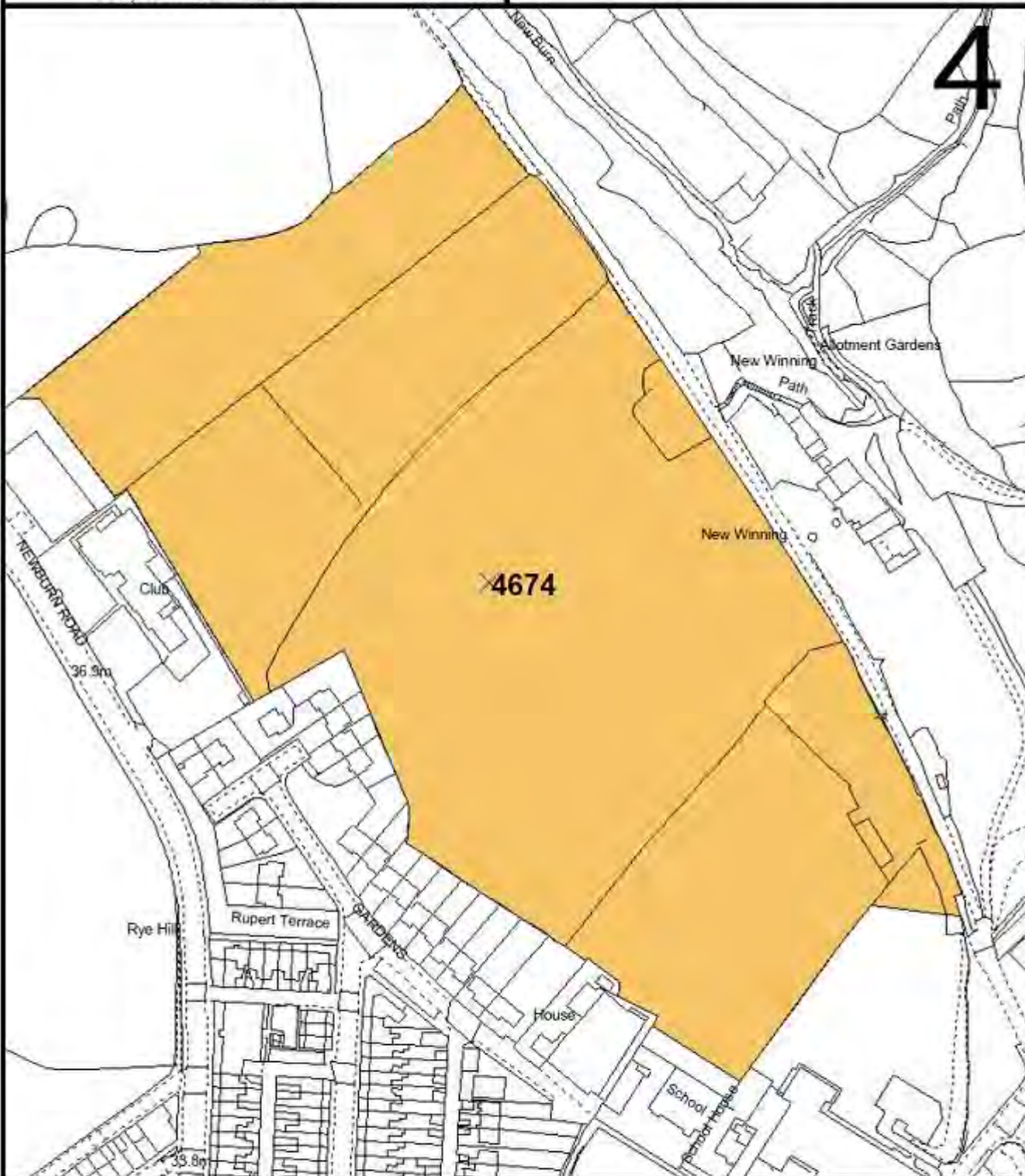
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A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4669: Walbottle Colliery			
Area (hectares)	1.91ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Residential to the north, west and south boundaries. (3)
		√		
Road Access	Good	Average	Poor	Via Hawthorn Terrace. (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Winning Farm land
Newburn

Area (Ha) : 6.32

Map : NZ 1666 SW/SE
NZ 1665 NW/NE

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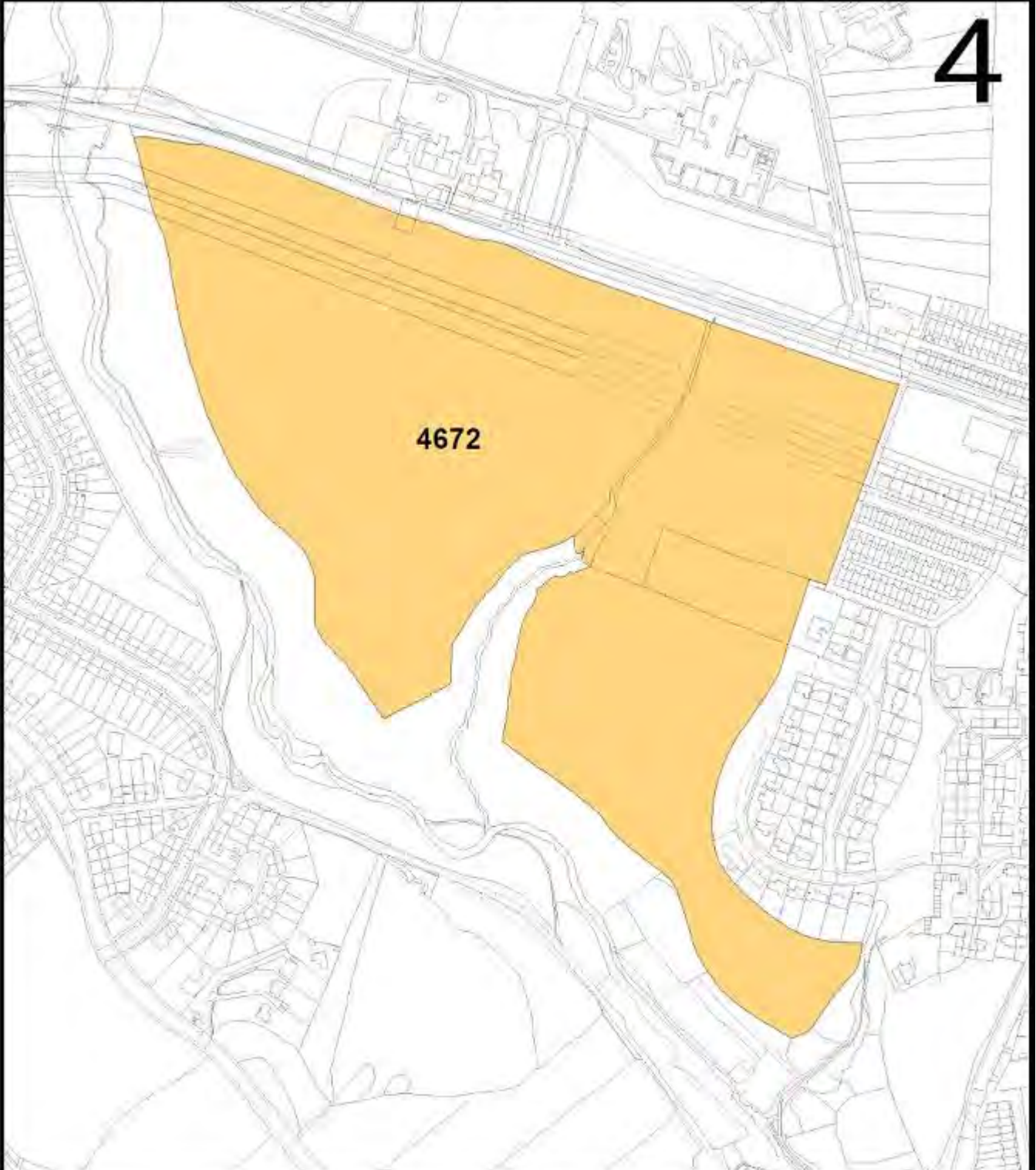
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4674: Winning Farm			
Area (hectares)	6.32ha			
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Agricultural. (3)
		√		
Road Access	Good	Average	Poor	Via Hawthorn Terrace. (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Walbottle Colliery Farm**

Area (Ha) : **17.76**

Map : NZ 1666 NE/NW
NZ 1666 SE/SW

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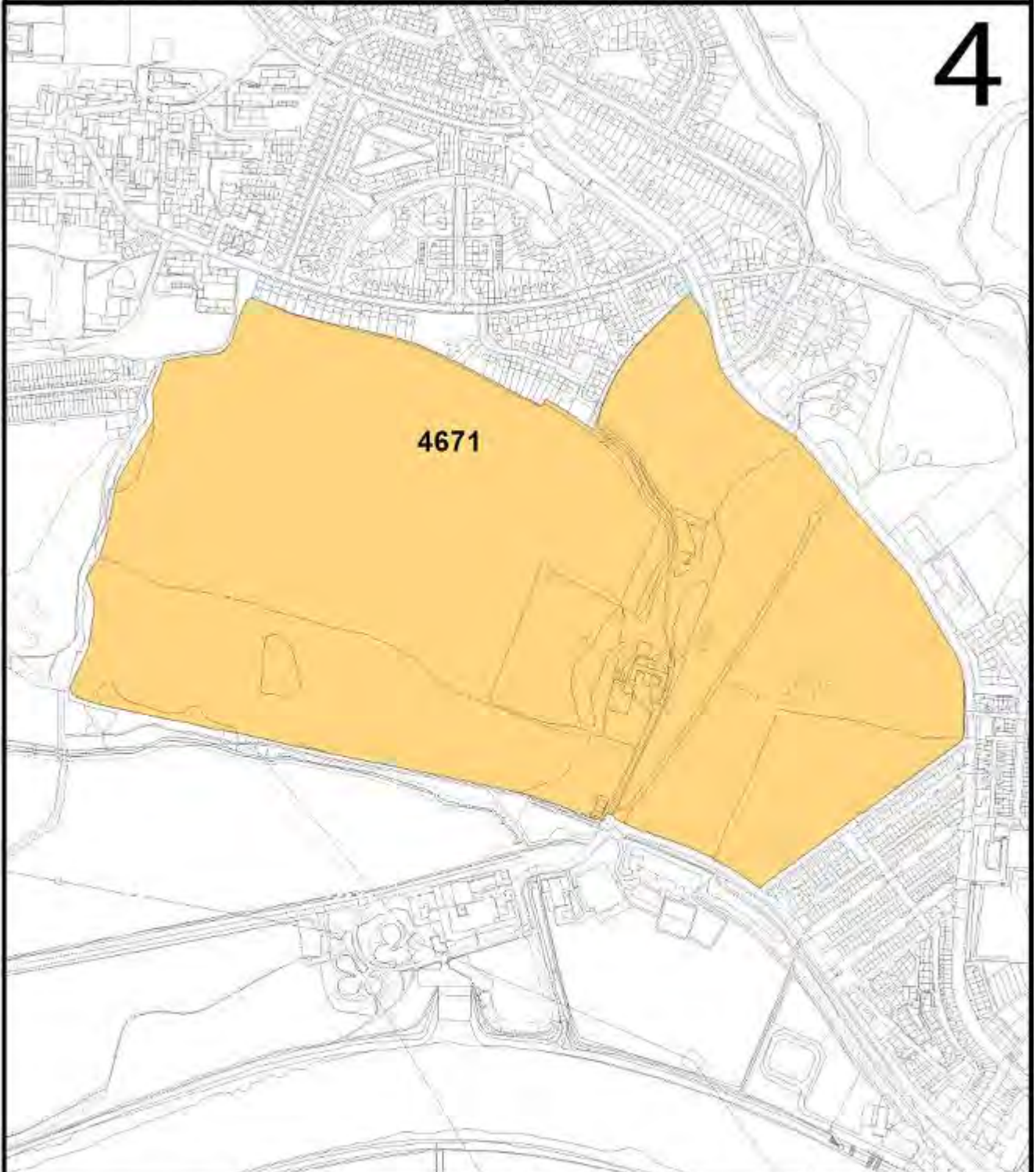
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4672: Walbottle Colliery B			
Area (hectares)	17.76ha			
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Residential to the north, west and south boundaries. (3)
		√		
Road Access	Good	Average	Poor	Via Hawthorn Terrace. (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : Newburn Grange Farm

Area (Ha) : 44.62

Map : NZ 1565 NE/NW
NZ1566
NZ1665 NE/NW
NZ 1666 SW

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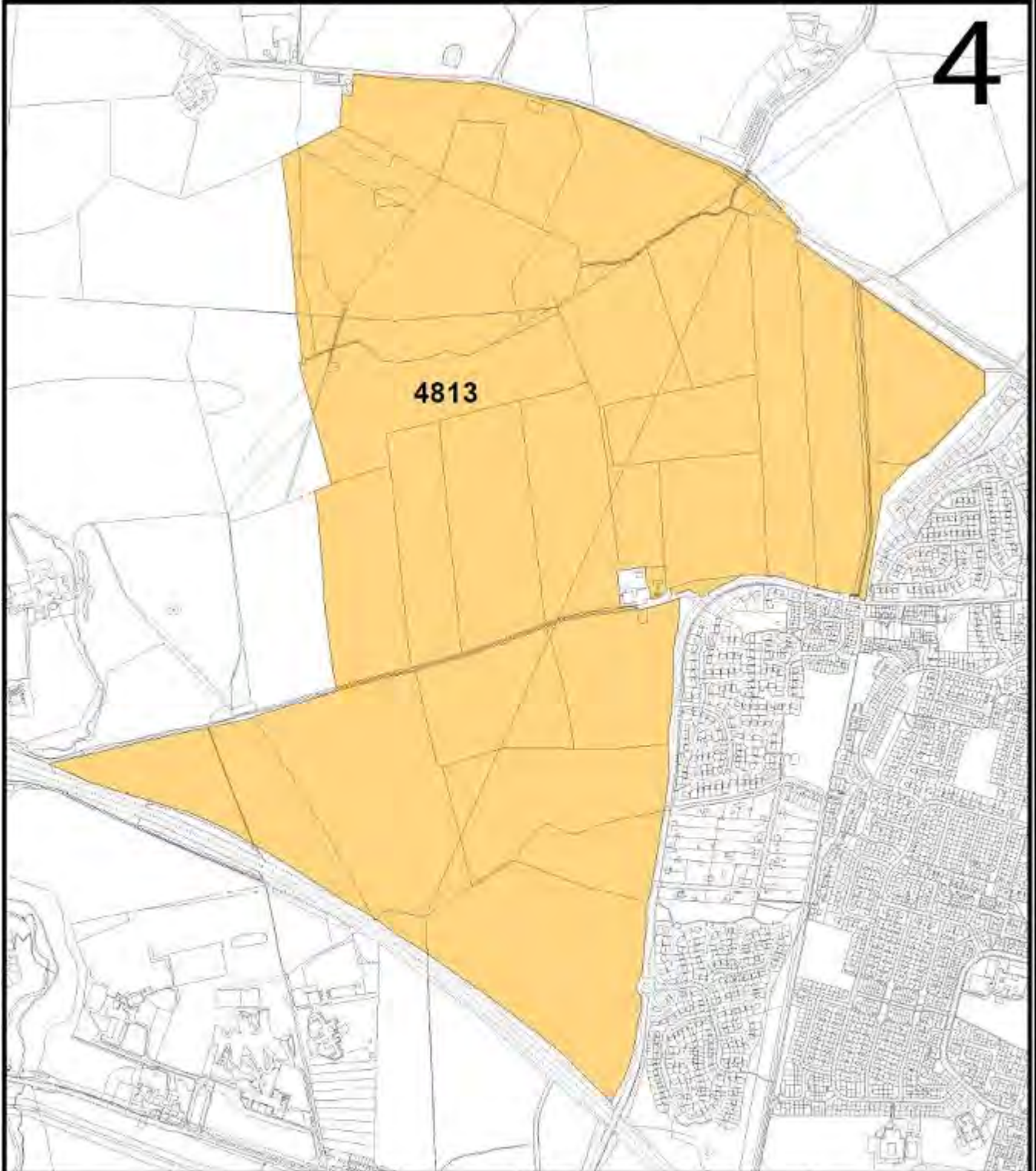
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4671: Newburn Grange Farm			
Area (hectares)	44.62ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Agricultural with residential to the north. (3)
		√		
Road Access	Good	Average	Poor	Via Grange Road. (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Fell House Farm**

Area (Ha) : **158.15**

Map : NZ 1667, 1886
NZ 1668
NZ 1767
NZ 1766

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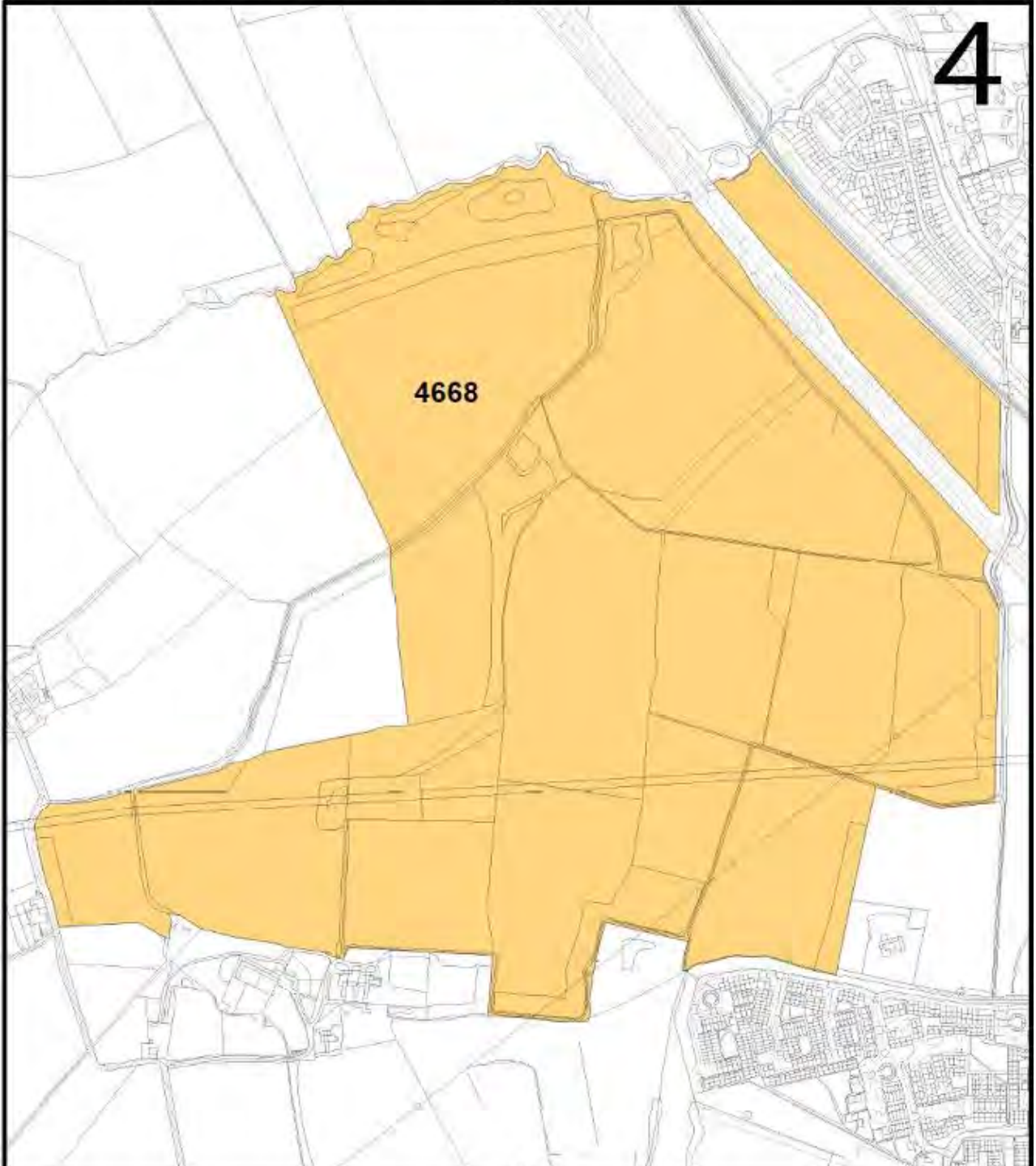
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4813: Fell House Farm			
Area (hectares)	158.15ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Residential to the eastern boundary. (3)
		√		
Road Access	Good	Average	Poor	Via the A189. (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Whorlton Farm

Area (Ha) : 116.71

Map NZ 1868 NE/NW/SE
NZ 1869 NE/SE
NZ 1968 NE/NW/SW
NZ 1969

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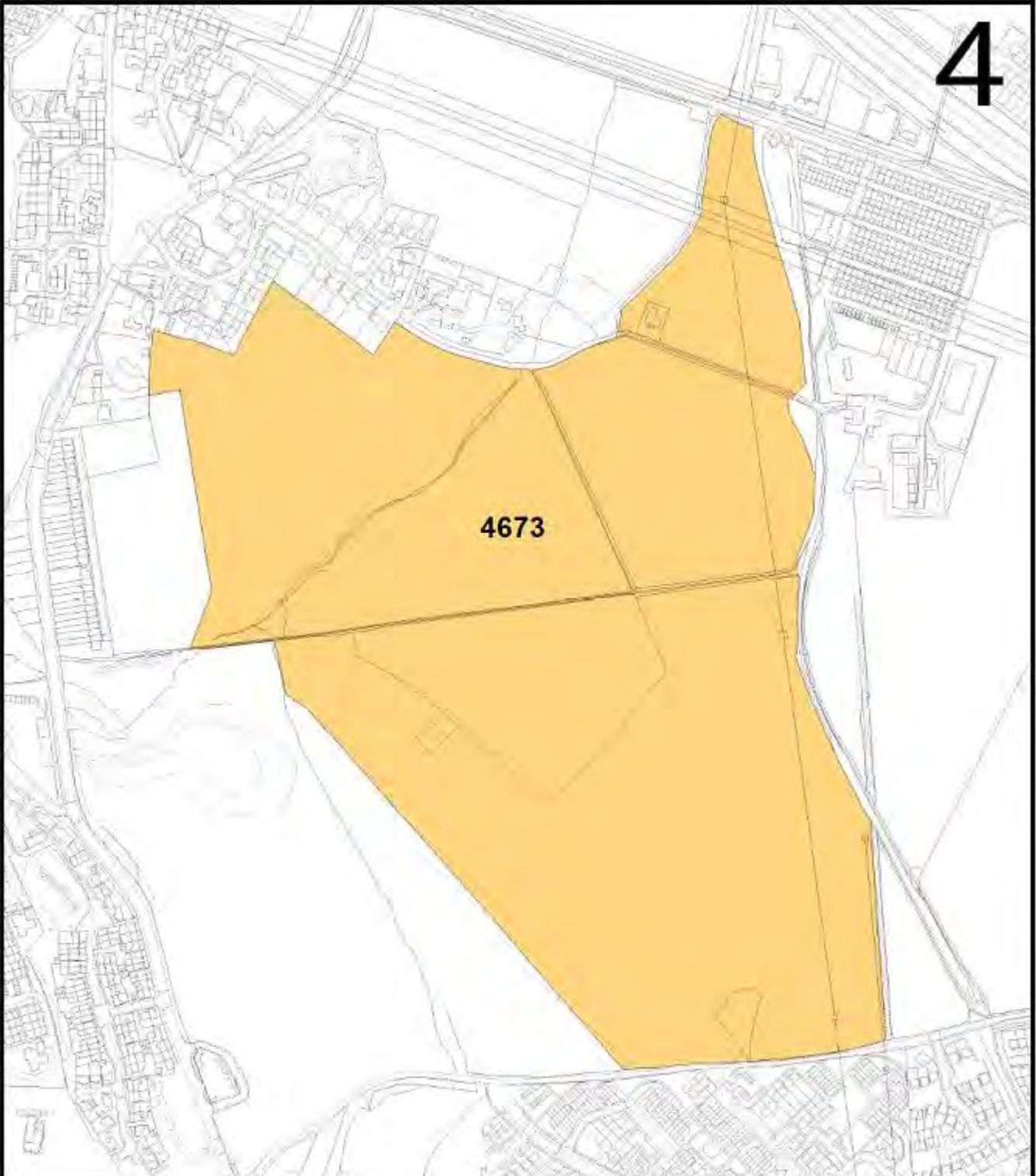
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4668: Whorlton Farm			
Area (hectares)	116.71ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Residential to the southern boundary. . (3)
		√		
Road Access	Good	Average	Poor	Close proximity to the A69 (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
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(Scoring: 5 = best, 1 = worst)



Address : Walbottle Colliery Farm 2

Area (Ha) : 35.10

Map : NZ 1766 SW/SE
NZ 1765

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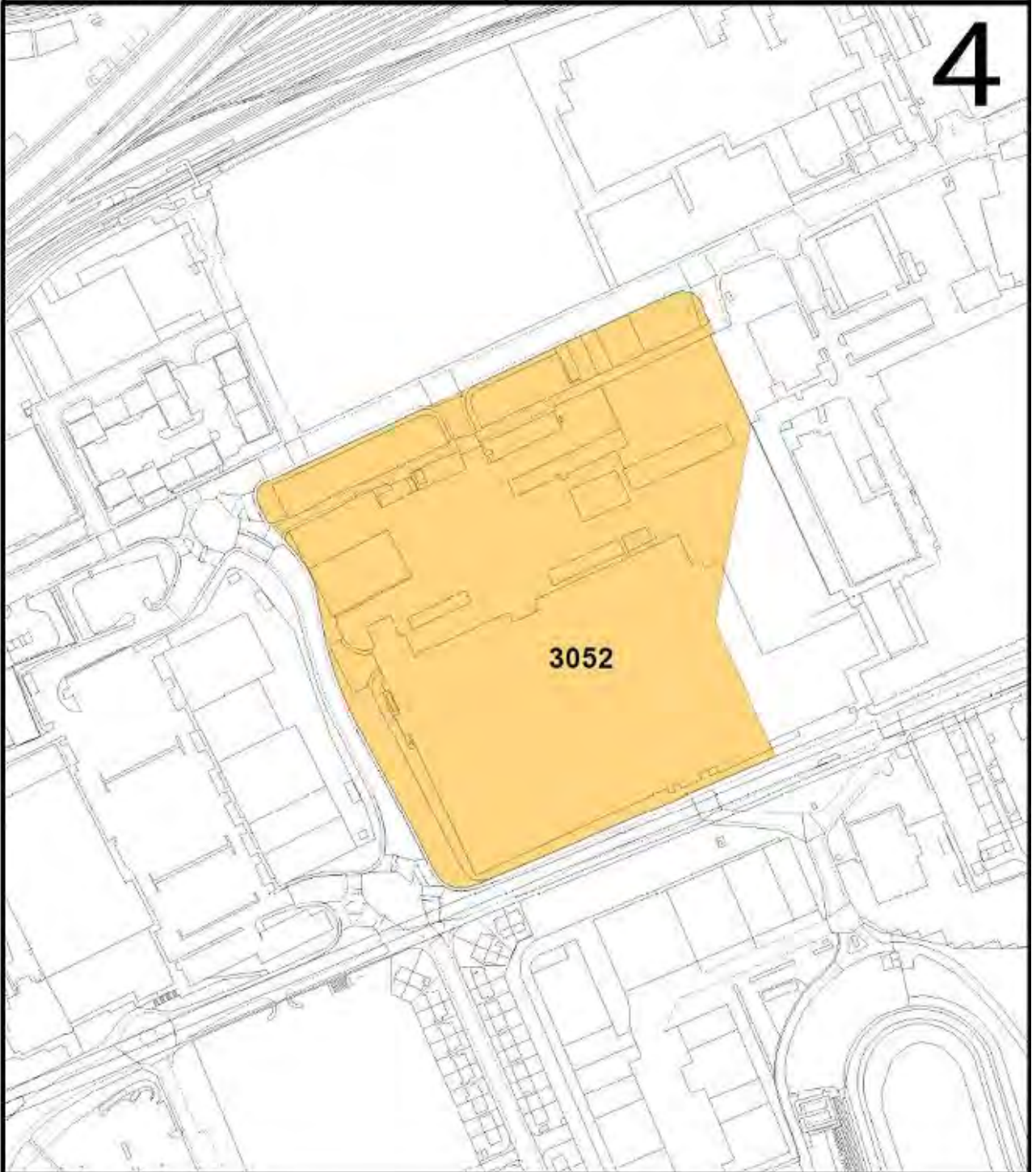
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4673: Walbottle Colliery Farm			
Area (hectares)	35.10ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Greenfield site. (0)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated Green Belt. (1)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Currently used as agricultural land. Landowner has indicated that the site could come forward within a year of the grant of planning permission. (4)
	√			
Internal Environment	Good	Average	Poor	Agricultural. (3)
		√		
External Environment	Good	Average	Poor	Residential to the southern boundary. . (3)
		√		
Road Access	Good	Average	Poor	Close proximity to the A69 (2)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade D. (2)
		√		
Market Attractiveness	Good	Average	Poor	Site could be brought forward by the private sector without public sector intervention. (4)
		√		
Overall Assessment	Good	Average	Poor	The site is allocated Green Belt and is therefore unacceptable in planning policy terms. (2)
			√	

TOTAL SCORE	20
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(Scoring: 5 = best, 1 = worst)

4



Address : **Siemens
Shields Road South**

Area (Ha) : 6.41

Map : NZ 2765 SE

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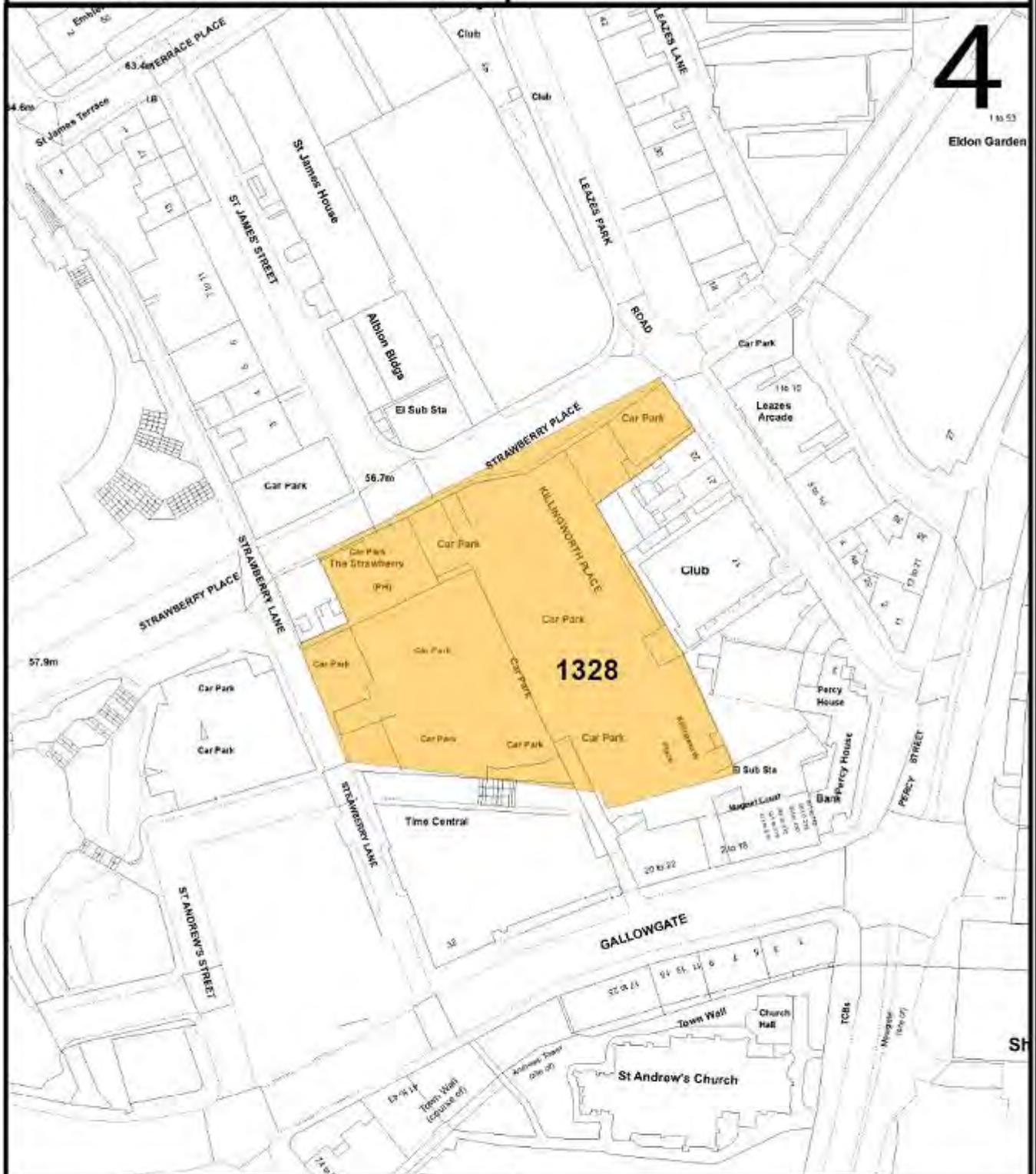
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3052: Siemens (South), Shields Road			
Area (hectares)	6.41ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Large cleared site, former industrial site. (3)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Site allocated under ED3.1 (32) to be retained for employment use. Sequential test would be required for B1 uses. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Flat site, no major topographical features. Ground contamination possible. (2)
		√		
External Environment	Good	Average	Poor	Industrial and retail parks. Close proximity to Shields Road retail centre. (3)
		√		
Road Access	Good	Average	Poor	Via Shields Road/and or Fossway to the south. Junction improvements required to facilitate redevelopment. (2)
		√		
Public Transport	Good	Average	Poor	Close proximity to Chillingham Road Metro. (5)
		√		
Market Attractiveness	Good	Average	Poor	Council owned. Unlikely to come forward for employment use in the short to medium term. Site may be more suited to residential use. (1)
		√		
Overall Assessment	Good	Average	Poor	The Council's Urban Design Team are preparing a strategic framework for the Fossway Development Area. This involves looking at the development blocks on the IRDL and the two Siemens sites, links between them, and to the surrounding area. Improvements to the highway network are crucial to this process. (3)
		√		

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



<p>Address : Strawberry Place</p>	<p>Area (Ha) : 0.63</p>	<p>Map : NZ 2464</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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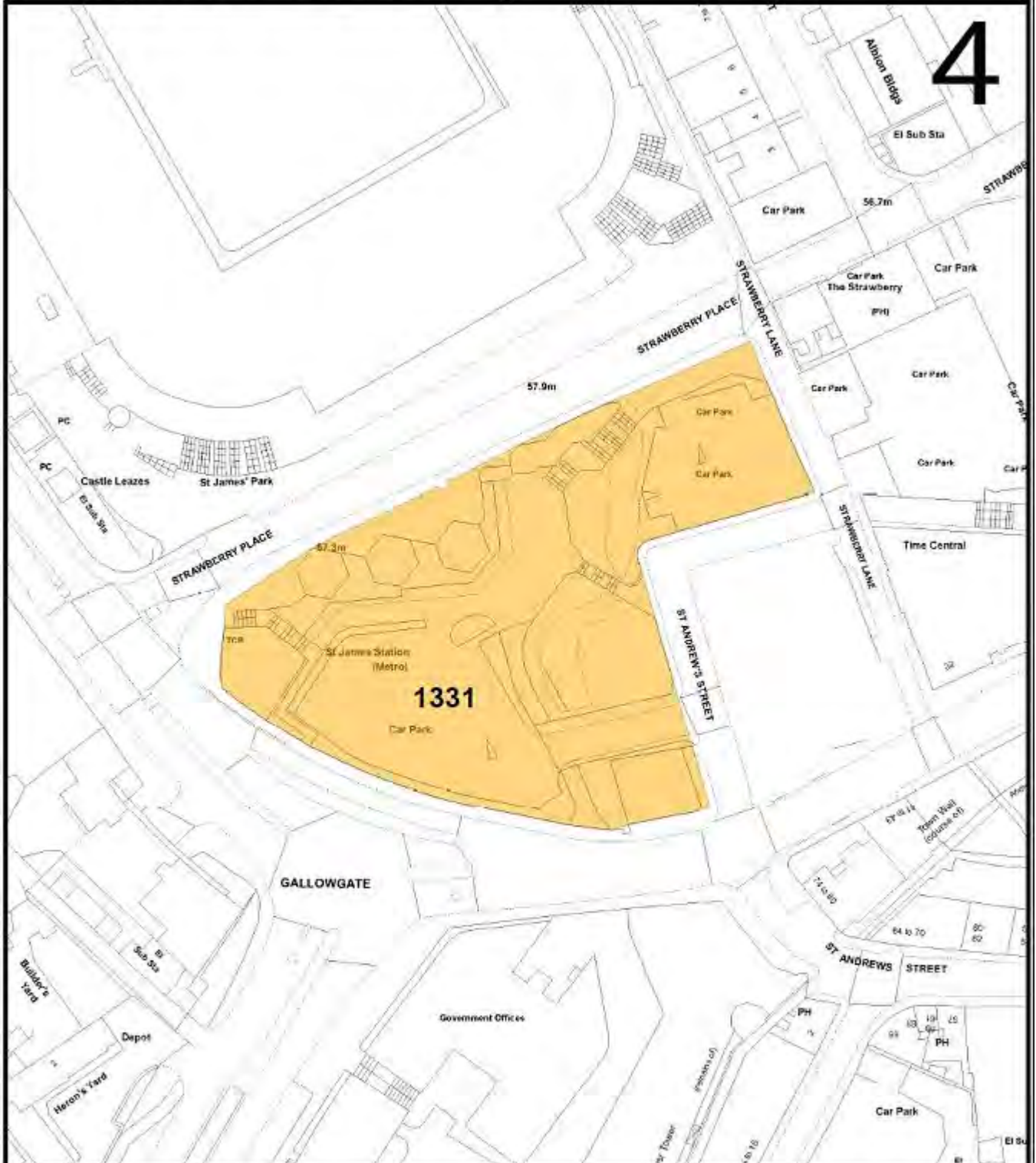
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1328: Strawberry Place			
Area (hectares)	0.63ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant land, formally used as surface car parking. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Extant planning permission indicates appropriate uses. (5)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Planning permission granted for mixed use scheme in January 2007 (13,250 sq.m. office space, 160 bed hotel and 663 sq.m. hotel). (5)
		√		
Internal Environment	Good	Average	Poor	Cleared site. (3)
			√	
External Environment	Good	Average	Poor	Predominantly offices and commercial uses. (5)
	√			
Road Access	Good	Average	Poor	From north via Strawberry Place only, restriction to southerly access due to Gallowgate traffic management issues. (3)
		√		
Public Transport	Good	Average	Poor	Readily accessible. Adjacent Metro Station (St James). Parking provision on site as per planning application for 110 spaces. (5)
	√			
Market Attractiveness	Good	Average	Poor	Viability affected by the recession. Developer requires substantial pre-lets for B1 (circa 60%) to trigger development on site. (3)
	√			
Overall Assessment	Good	Average	Poor	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term. (4)
	√			

TOTAL SCORE	36
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(Scoring: 5 = best, 1 = worst)

4



Address : St James Metro Station	Area (Ha) : 0.90	Map : NZ 2464 NW/SW
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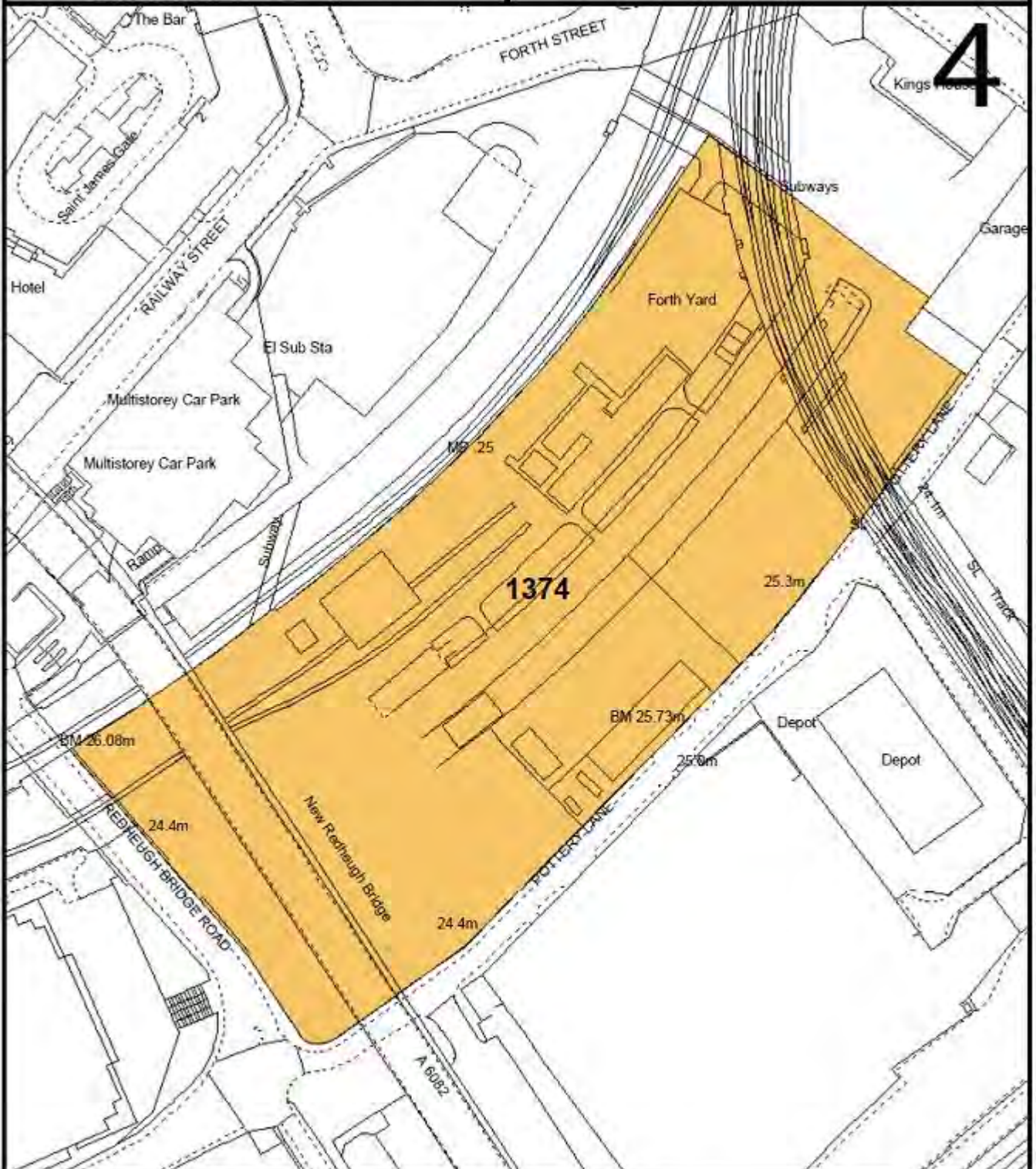
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1331 St James Metro Station, Gallowgate		
Area (hectares)	0.90ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
	N/A	N/A	N/A
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
			√
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		
Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipate that the site will come forward in the short to medium term. (4)			

TOTAL SCORE	31
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Forth Goods Yard (East side)

Area (Ha) : 2.77

Map : NZ 2463 NE/SE
NZ 2463 NW/SW

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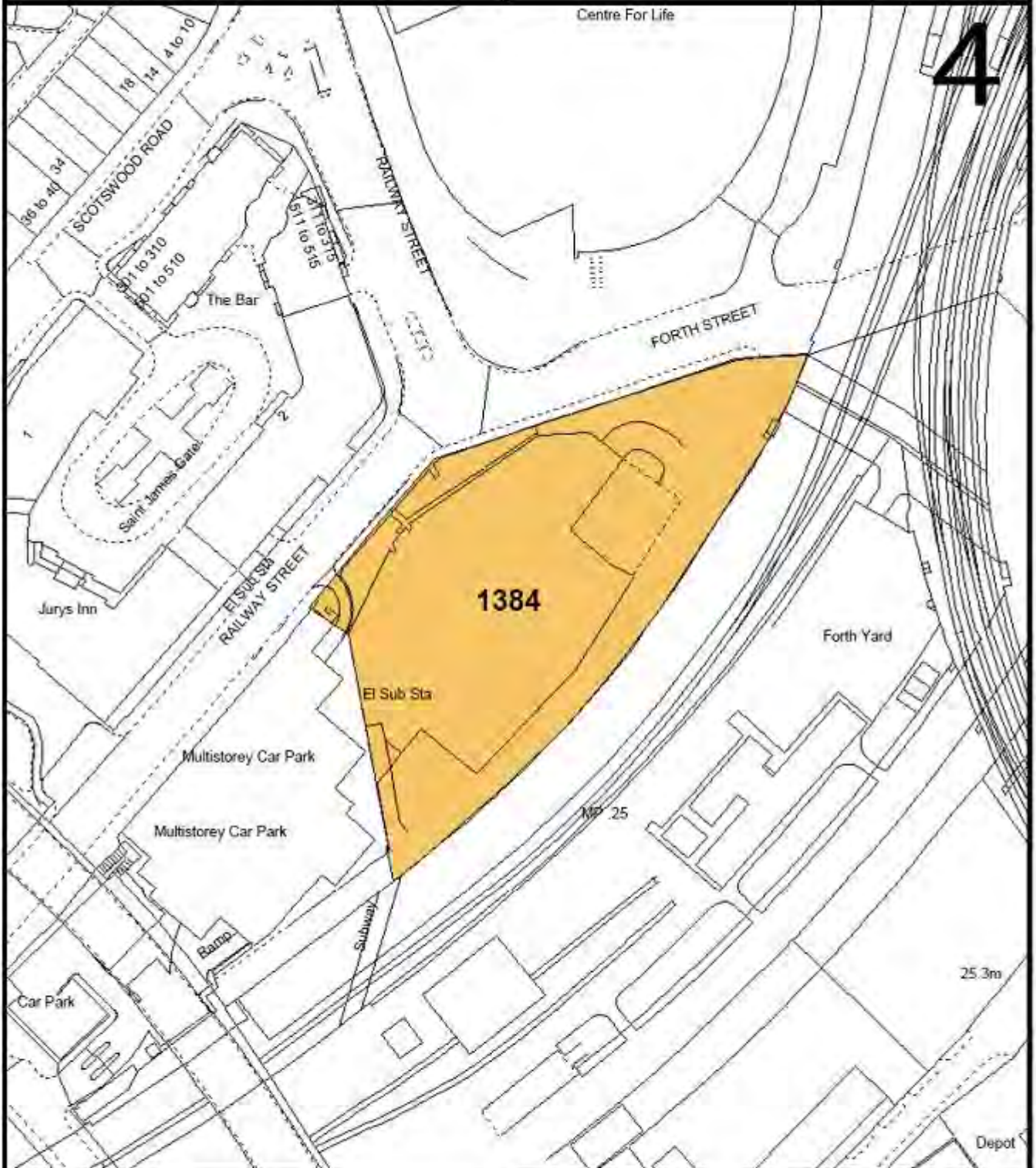
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1374: Forth Goods Yard (East Side)			
Area (hectares)	2.77ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Large underused site with existing railway sidings and surface parking. 4 th Yard Study (2007) indicates site for office led development. (4)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Mainly disused/vacant site though some railway maintenance in situ and operational. This requires relocation prior to any marketing and redevelopment. Located to south west of Central Station. No sequential test needed. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	The site is owned by Network Rail, who are reluctant to market/release northern part of site. To transfer rail infrastructure is estimated to cost £1-1.5 million. Site disposal is also tied up with the future decision on franchising with Train Operators. (1)
			√	
Internal Environment	Good	Average	Poor	Mainly disused/vacant site. Contamination anticipated. Convoluted access. Highly visible site. (2)
			√	
External Environment	Good	Average	Poor	Surrounding uses a mixture of commercial uses and vacant underused sites and premises. No potential conflicting uses. (2)
			√	
Road Access	Good	Average	Poor	Access to the site can be gained via Forth Banks underneath the railway bridge. Height restrictions apply. In order to gain consent for network closure a case would need to be made to the Office for Rail Regulators. (2)
		√		
Public Transport	Good	Average	Poor	Public transport accessible within 5 minutes walking distance. (5)
	√			
Market Attractiveness	Good	Average	Poor	Network Rail issues to be resolved. Unlikely to be viable in the short to medium term. (2)
		√		
Overall Assessment	Good	Average	Poor	Large site with major constraints and infrastructure issues. Long term and uncertain. (2)
			√	

TOTAL SCORE	22
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(Scoring: 5 = best, 1 = worst)



Address : **Safestore
Forth Street**

Area (Ha) : 0.68

Map : **NZ 2463 NW
NZ 2463 SW**

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Scale : 1:1,250 @ A4

Date of
Publication: 04/06/2009

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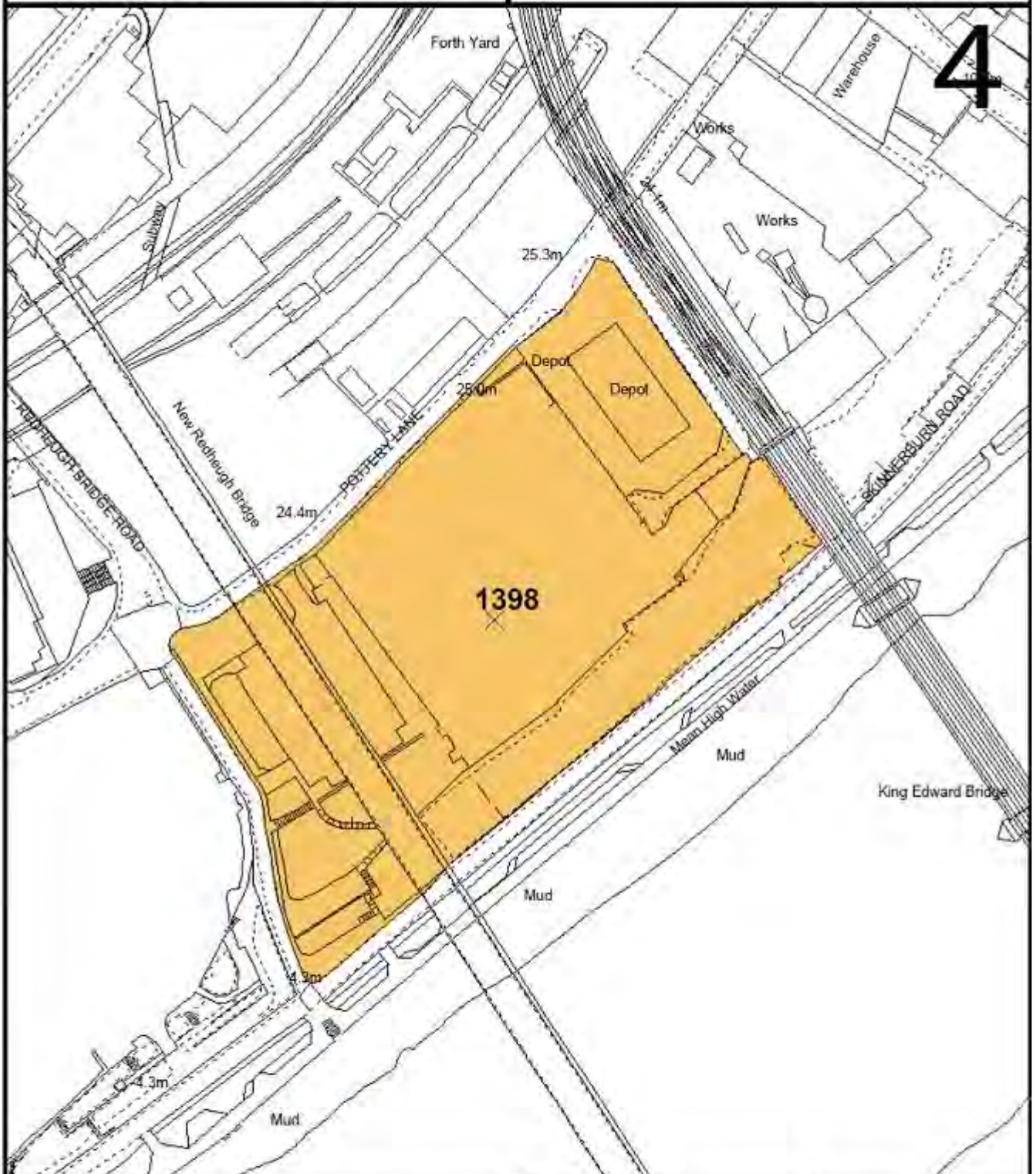
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1384 Safestore (Former Herons Garage)		
Area (hectares)	0.68ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
			√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	√

TOTAL SCORE	25
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land east of Shot Factory Lane
south of Pottery Lane

Area (Ha) : 3.15

Map : NZ 2463 SW
NZ 2463 SE

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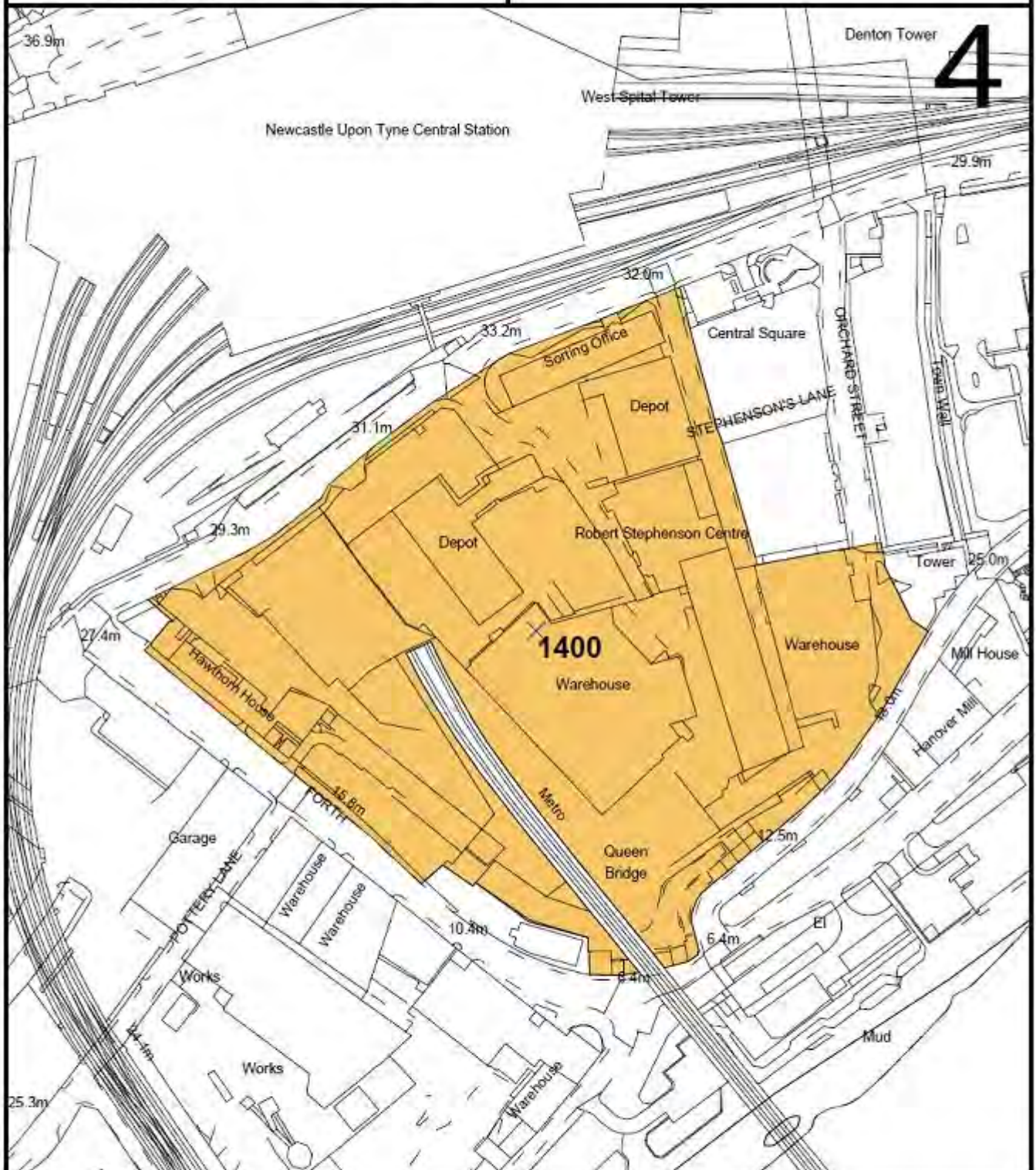
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A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1398: Land south of Pottery Lane			
Area (hectares)	3.15ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant/derelict site (not allocated in UDP). Also includes former PO depot and overspill car park for Arena. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant/derelict site. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Considered in 4th Yard Study (2007) for mixed use office led development. Sequential test not required. (4)
			√	
Internal Environment	Good	Average	Poor	Relatively flat site though at southern extremity land falls away sharply (being part of the northern escarpment to Tyne Gorge). Ground contamination – former uses metallurgical industries. (2)
			√	
External Environment	Good	Average	Poor	Adjacent to the Arena. (3)
		√		
Road Access	Good	Average	Poor	Via Pottery Lane / Redheugh Bridge Road. Generally poor access to strategic highway network. (2)
			√	
Public Transport	Good	Average	Poor	5 minutes walk to rail / metro / bus. (5)
	√			
Market Attractiveness	Good	Average	Poor	It is anticipated that the site would come forward as part of the Forth Yard redevelopment. (3)
			√	
Overall Assessment	Good	Average	Poor	Not viable in current climate. Principle of locating a casino within the 4th Yard site agreed by the Council. part of a longer term comprehensive redevelopment. (2)
			√	

TOTAL SCORE	27
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(Scoring: 5 = best, 1 = worst)



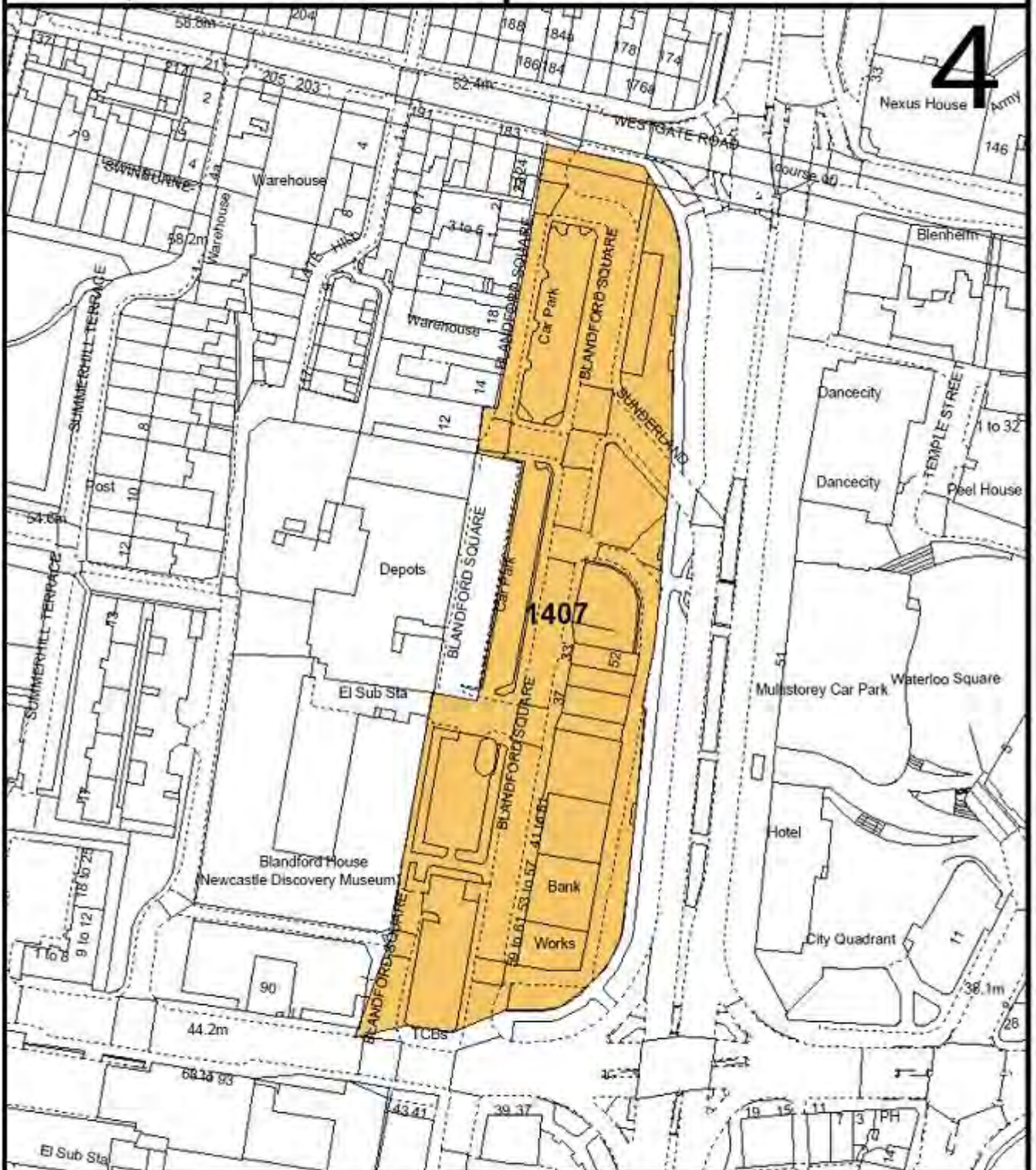
<p>Address : Stephenson Quarter south of Forth Street</p>	<p>Area (Ha) : 4.13</p>	<p>Map : NZ 2463 NE</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I., Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1400: Stephenson Quarter, South of Forth Street			
Area (hectares)	4.13 ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Former mixed industrial/commercial area with number of buildings in situ including former railway works, warehousing and post office sorting depot. (3)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Former commercial / industrial area. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	PO sorting depot still in use. Some of the buildings will be retained as part of mixed use redevelopment (Hawthorn House). Remainder of 4ha site predominantly vacant pending redevelopment. (2)
	√	√		
Internal Environment	Good	Average	Poor	Number of buildings in situ, ground contamination associated with previous industrial operations. (2)
		√		
External Environment	Good	Average	Poor	East – B1 offices, north and west Railway Station and sidings. (3)
	√			
Road Access	Good	Average	Poor	Main access via Forth Street only. Site not well located in relation to strategic highway network. S106 highways improvements requirement. (3)
		√		
Public Transport	Good	Average	Poor	Within 5 minutes of walk of public transport including Central Station. (5)
	√			
Market Attractiveness	Good	Average	Poor	Development on site has stalled due to the recession and issues with the PO sorting depot. (3)
		√		
Overall Assessment	Good	Average	Poor	Anticipated that the site will come forward when the market retains and the PO is relocated. (3)
		√		

TOTAL SCORE	27
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land at Blandford Square

Area (Ha) : 1.32

Map : NZ 2463 NW
NZ 2464 SW

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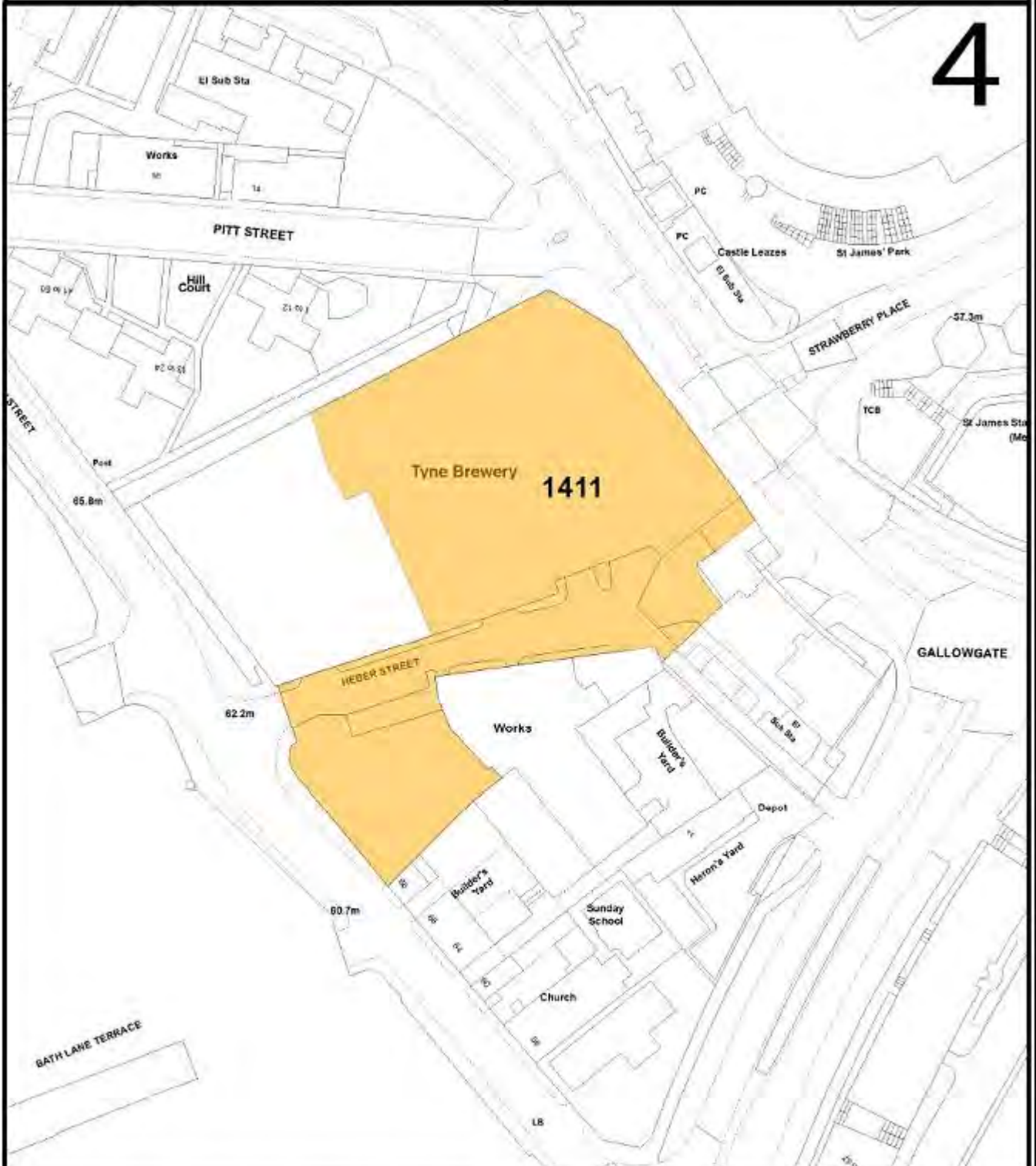
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1407: Blandford Square			
Area (hectares)	1.32ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Located adjacent to St James Boulevard. The area comprises of a number of surface car parks. The south east of the site contains a number of commercial buildings still in occupation. (3)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated in UDP Policy ED2.2 for mixed use development. Approved Development Brief July 2000. Civic space / public square to be provided at southern end of site. No sequential test required. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	1.32ha available for redevelopment. Site clearance / land assembly issues to be resolved. (2)
			√	
Internal Environment	Good	Average	Poor	Surface car parks and a number of warehouses. (3)
		√		
External Environment	Good	Average	Poor	Adjacent to St James Boulevard, commercial area. (4)
	√			
Road Access	Good	Average	Poor	Via Blandford Square. (4)
	√			
Public Transport	Good	Average	Poor	Site located next to main public transport routes. (5)
	√			
Market Attractiveness	Good	Average	Poor	Viability affected by the recession. Existing commercial buildings need to be relocated to provide for comprehensive redevelopment. (2)
	√			
Overall Assessment	Good	Average	Poor	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site could come forward in part for B1 uses, subject to land assembly. However, it is questionable whether the site will come forward within the plan period. (2)
	√			

TOTAL SCORE	29
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(Scoring: 5 = best, 1 = worst)

4



Address : Former Brewery Bottling Plant	Area (Ha) : 0.80	Map : NZ 2464 SW
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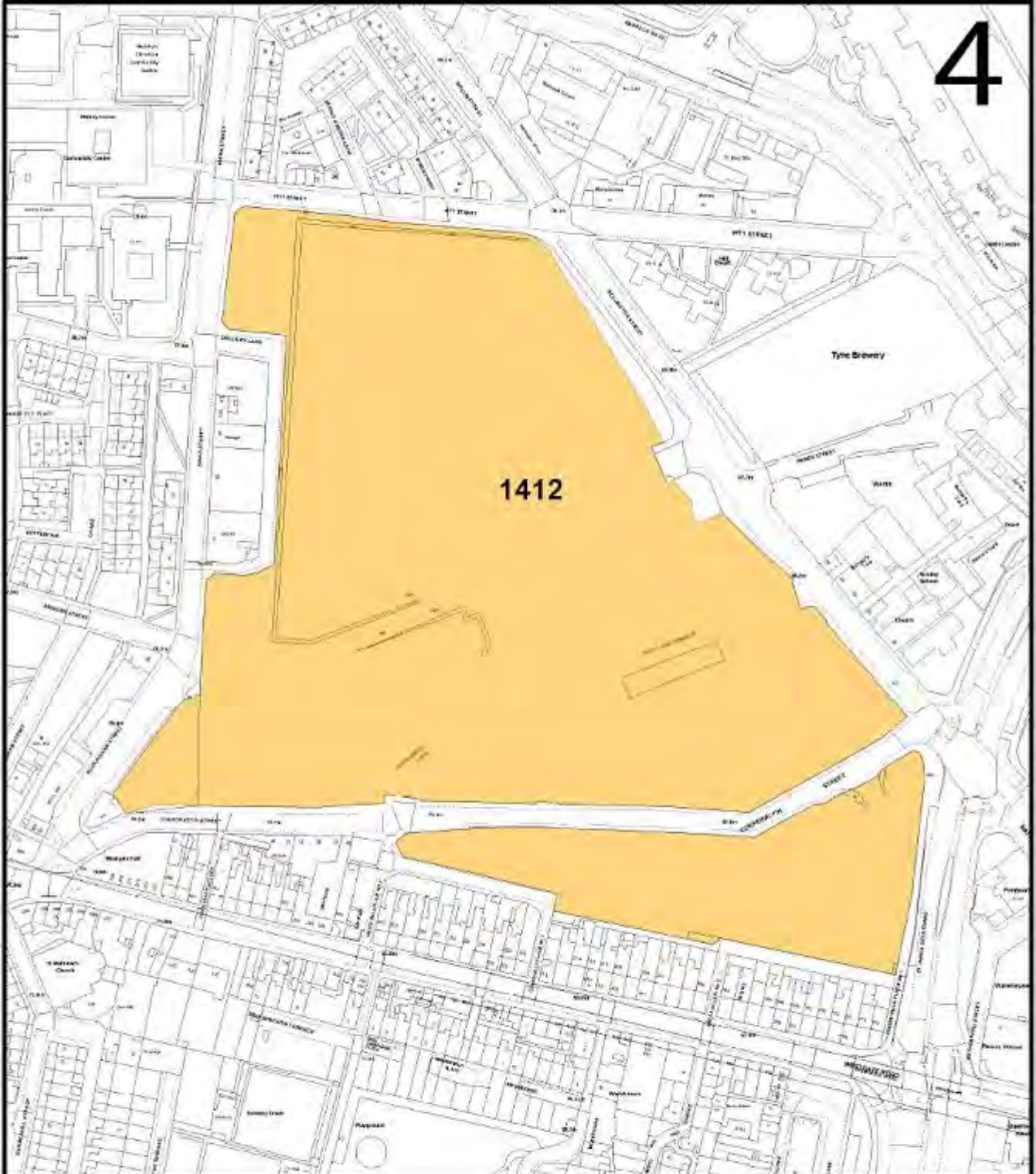
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1411: Former Brewery Bottling Plant			
Area (hectares)	0.80ha			Comments
Current Use	Office	Industrial	Mixed	Vacant recently cleared site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Suitable for mixed use development. Commercial B1(a). Detailed permission for mixed use development. Includes 25,000 sq.m. of B1(a) in two blocks, and hotel and student accommodation. (5)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Science Central – refer to Site Reference 1412 (5)
	√	√	√	
Internal Environment	Good	Average	Poor	Cleared site. (5)
	√			
External Environment	Good	Average	Poor	Former industrial area to the west (main brewery site) now cleared, Football Stadium to the north. Pitt Street flats (due to be cleared in the long term). (3)
		√		
Road Access	Good	Average	Poor	Main access via Barrack Road / Pitt Street. (5)
	√			
Public Transport	Good	Average	Poor	Close to metro interchange. (4)
	√			
Market Attractiveness	Good	Average	Poor	B1 component – viable. Potential competing uses for student housing and hotel/leisure uses in particular. Development now on site. (4)
	√			
Overall Assessment	Good	Average	Poor	Potential high demand for B1, need to ensure occupiers are science related. (4)
	√			

TOTAL SCORE	38
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(Scoring: 5 = best, 1 = worst)

4



Address : Main Brewery Site

Area (Ha) : 7.83

Map : NZ 2464 NW/SW
NZ 2364 NE/SE

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Date of
Publication: 17/03/2010

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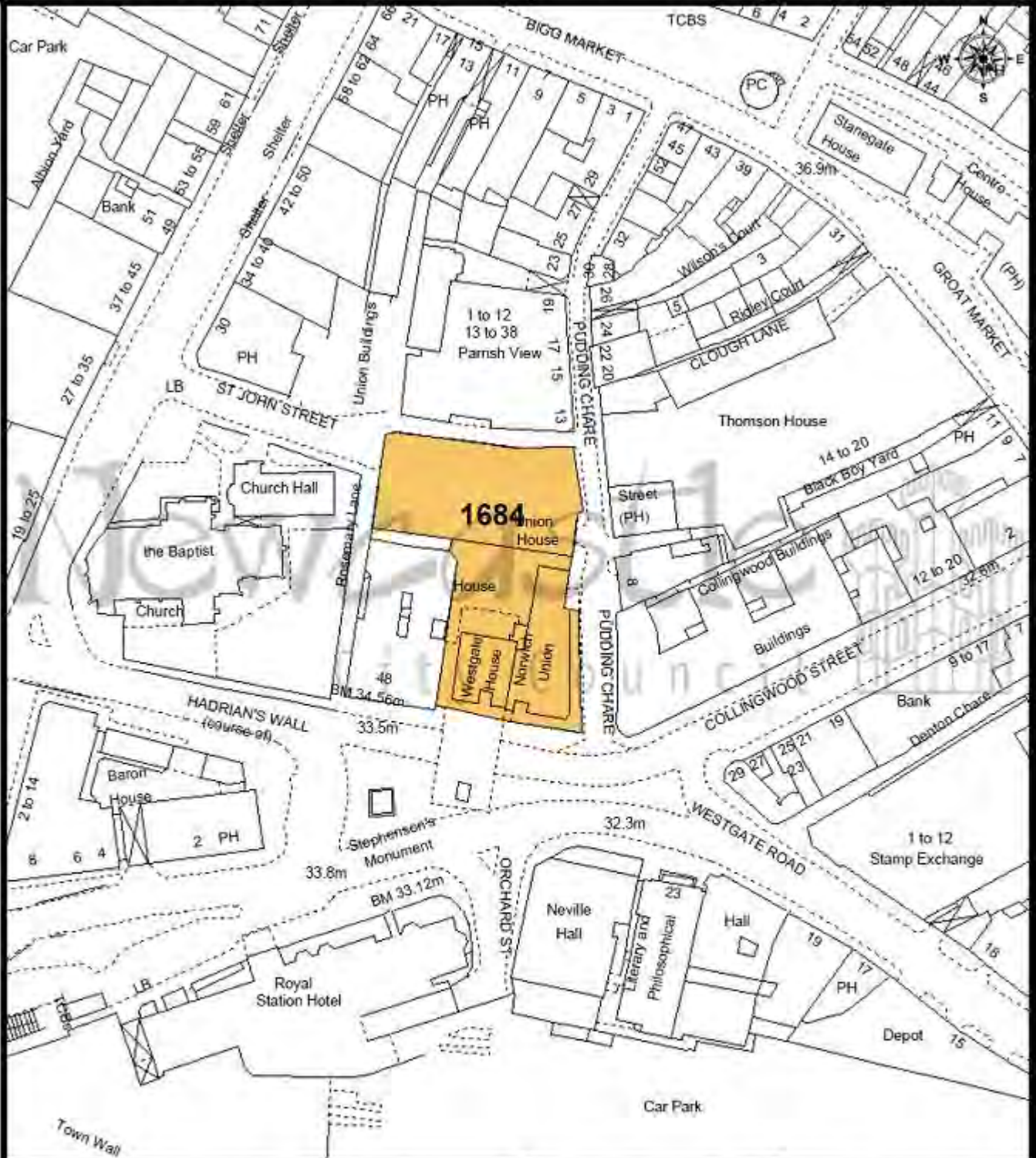
Drawn By:
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1412: Former Main Brewery Site			
Area (hectares)	7.83ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Cleared former industrial site. (3)
	N/A	N/A	N.A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Masterplan for Science Central, includes major academic/research space with significant B1 (a, b and c) uses as part of overall concept for other more general mixed use development. No sequential test due to location. However, scale of development needs careful consideration as to impact on supply, etc of B1 and residential uses. (5)
		N/A		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Part of Science Central – refer also to Site Reference 1411. (5)
	√	√	√	
Internal Environment	Good	Average	Poor	Cleared site. (5)
	√			
External Environment	Good	Average	Poor	B1, some B2 (subject to redevelopment long term?), Westgate Hill residential area to the south/west. (3)
	√			
Road Access	Good	Average	Poor	Via Wellington Street/St James Boulevard. Concerns over adequacy given likely scale of development on the site. (5)
		√		
Public Transport	Good	Average	Poor	Close to Metro interchange. (4)
	√			
Market Attractiveness	Good	Average	Poor	B1(a) proposed uses to mainly front St James Boulevard area. Elsewhere B1a – c closely linked to university expansion cross subsidisation. Public subsidy will facilitate the development going forward, however too much B1a could restrict B1(a) developments in the pipeline. (4)
	√			
Overall Assessment	Good	Average	Poor	Development over 7 – 20 year period up to 2030. (4)
	√			

TOTAL SCORE	38
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(Scoring: 5 = best, 1 = worst)



Address : Westgate House, Norwich Union House
and land to rear
Westgate Road

Area (ha) : 0.24

Map : NZ 2464 SE
NZ 2463 NE

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Date : 10/06/2005

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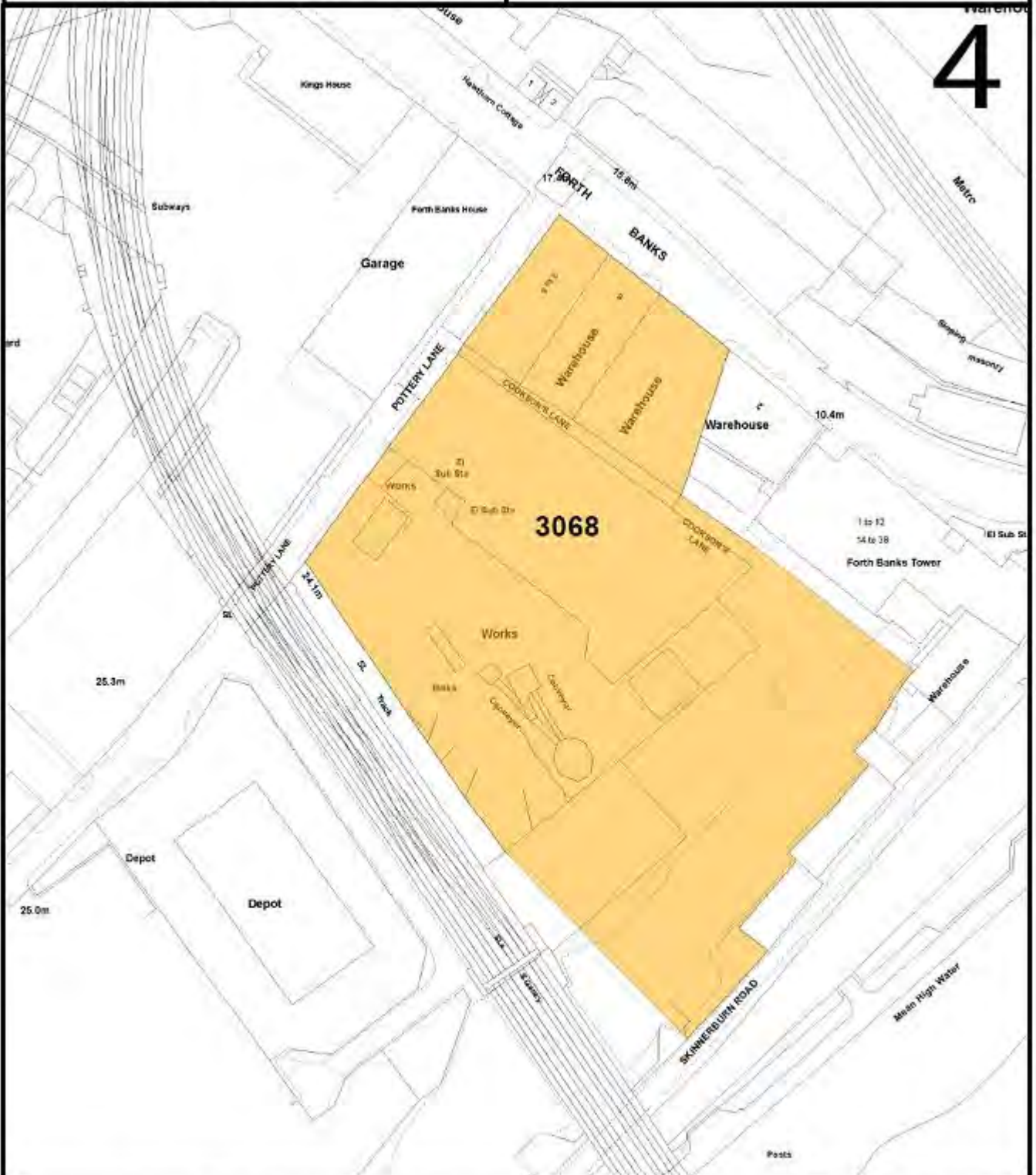
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1684: Westgate House (& Norwich Union House and land to the rear), Westgate Road		
Area (hectares)	0.24ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
	√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
	√		
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		

TOTAL SCORE	30
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(Scoring: 5 = best, 1 = worst)



Address : Cement Works and scrap yard Pottery Lane East	Area (Ha) : 1.42	Map : NZ 2463 NE/SE
--	-------------------------	----------------------------

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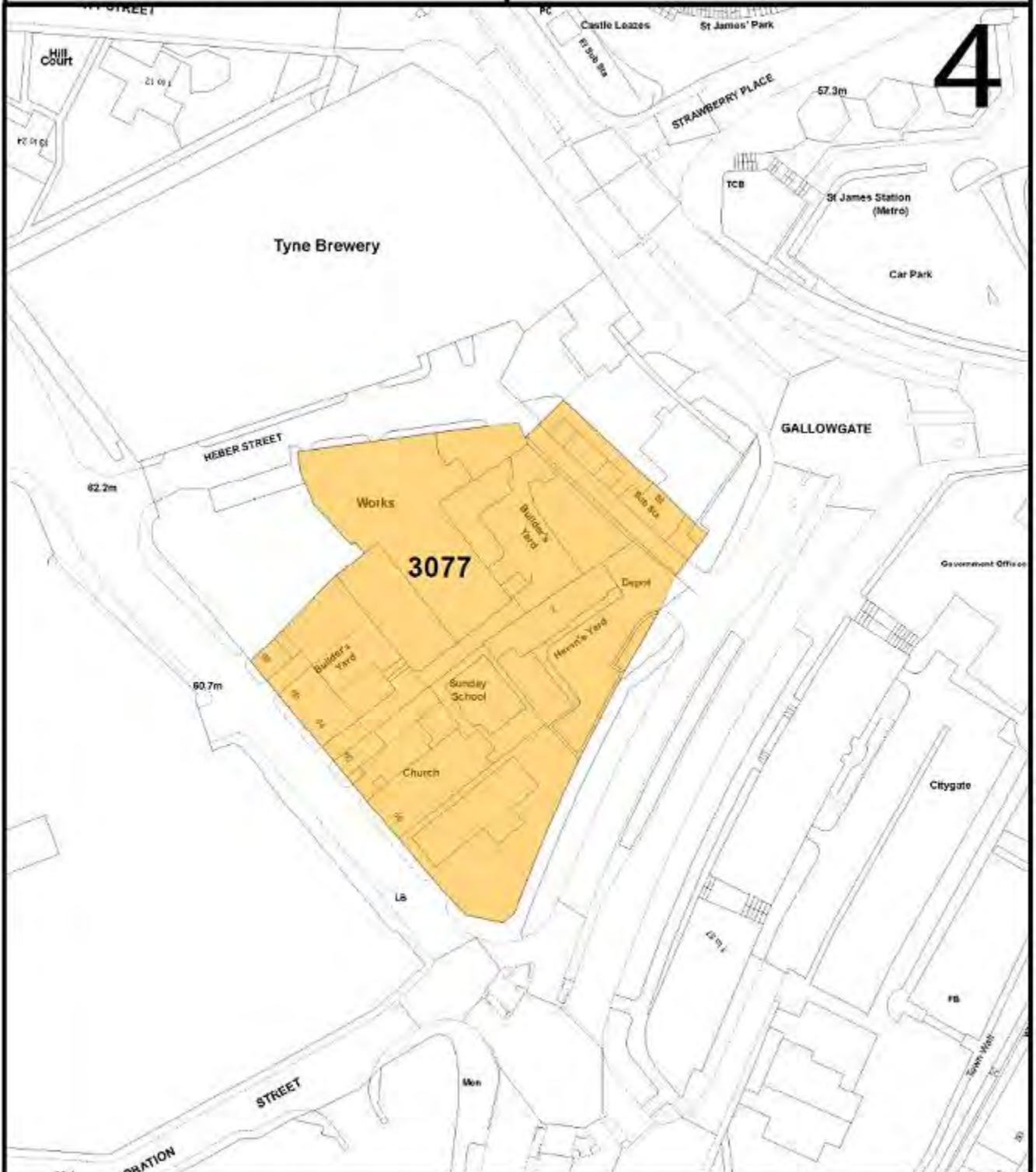
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3068: Cement Works and Scrap Yard off Forth Banks and Pottery Lane			
Area (hectares)	1.42ha			
Current Use	Office	Industrial	Mixed	Mixed industrial / commercial area includes former scrap yard and concrete batching plant. (2)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Unallocated white land. Considered as part of the 4 th Yard Study (2007). (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Of 1.46ha site approximately one third vacant (former scrap yard). Existing buildings on site adjacent Forth Banks appear to be still in use for small workshop type B2 uses. (2)
		√	√	
Internal Environment	Good	Average	Poor	Gentle slope from north to south. At southern edge site falls away dramatically (escarpment) towards the River Tyne. Electrical substation located adjacent existing concrete batching plant. Likely contamination throughout the site. (2)
			√	
External Environment	Good	Average	Poor	Mainly B1/B2/B8 to north and east. Rail viaduct to west. (3)
		√		
Road Access	Good	Average	Poor	Via Pottery Lane. (3)
			√	
Public Transport	Good	Average	Poor	5 minutes walk to Central Station (rail/metro/bus). (3)
	√			
Market Attractiveness	Good	Average	Poor	Planning application progressed by Metier comprising a 120 -150 bed hotel, up to 800 student housing units with operator interest and speculative office. Under current market conditions speculative office development unlikely. (3)
Overall Assessment	Good	Average	Poor	Proposal for housing. Identified in the SHLAA (3)

TOTAL SCORE	24
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(Scoring: 5 = best, 1 = worst)



4

<p>Address : Heber Street and brewery offices</p>	<p>Area (Ha) : 0.78</p>	<p>Map :NZ 2464 SW</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I., Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

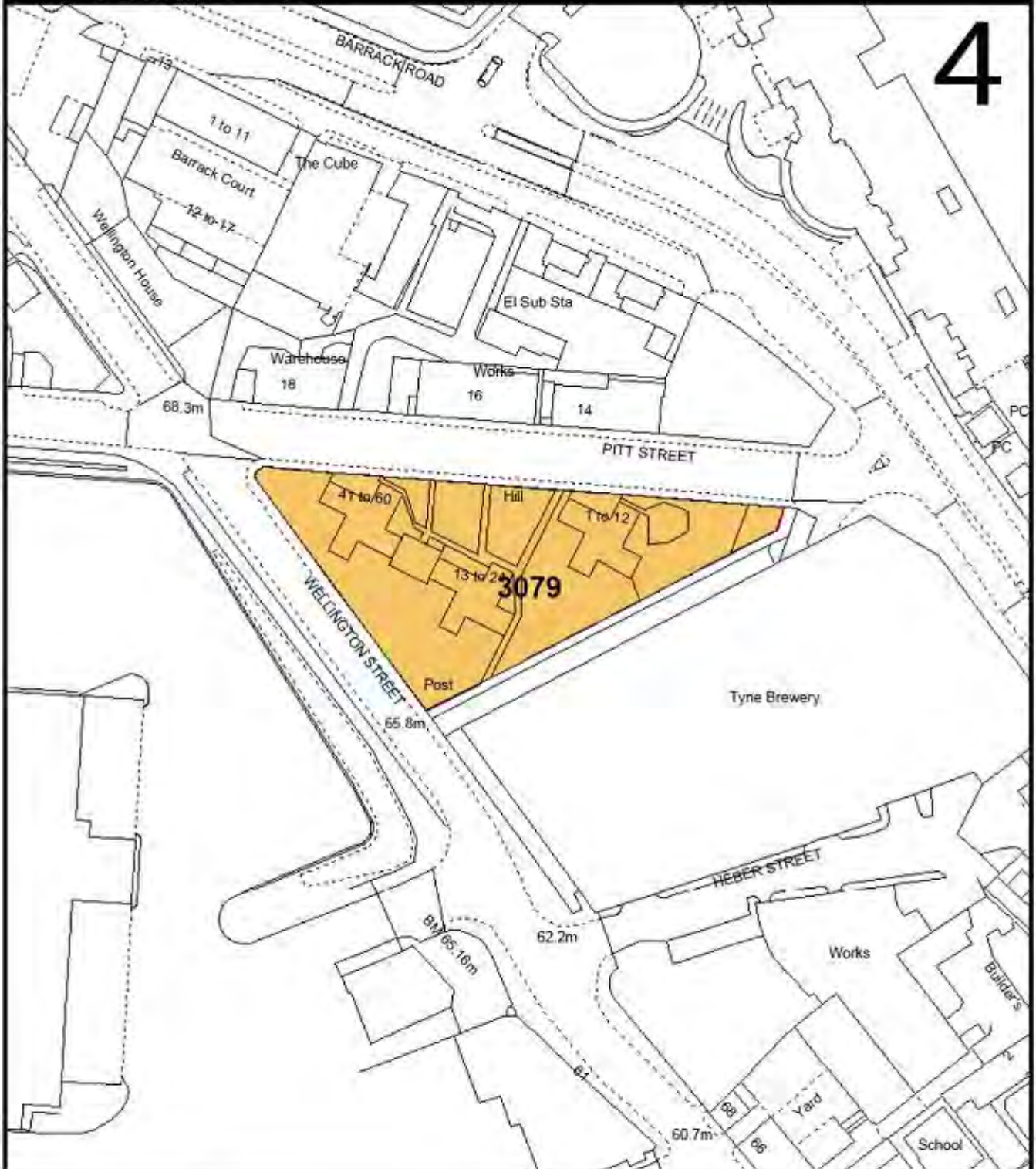
Site Reference & Address	3077: Heber Street and Brewery Offices			
Area (hectares)	0.78ha		Comments & Score out of 5	
Current Use	Office	Industrial	Mixed	Includes listed church, National Tyres and Heron's yard. (3)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Majority of the site is allocated for employment use (Policy ED3.1 of UDP). (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Previous works and yard has been cleared for development. Considered as part of the EDAW Science Central Masterplan area. Location is a critical link through Science Central from Gallowgate. (4)
	√	√	√	
Internal Environment	Good	Average	Poor	Possible ground contamination. (2)
		√		
External Environment	Good	Average	Poor	Mainly mixed commercial or cleared sites. (4)
		√		
Road Access	Good	Average	Poor	Restricted access from St James Boulevard. Main access via Wellington Street. (3)
		√		
Public Transport	Good	Average	Poor	5 minutes walk to bus / metro. Accessibility Grade A. (5)
		√		
Market Attractiveness	Good	Average	Poor	Prime location, well serviced and accessed. (5)
	√			
Overall Assessment	Good	Average	Poor	Part of Science Central. (5)
	√			

TOTAL SCORE	35
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(Scoring: 5 = best, 1 = worst)



4



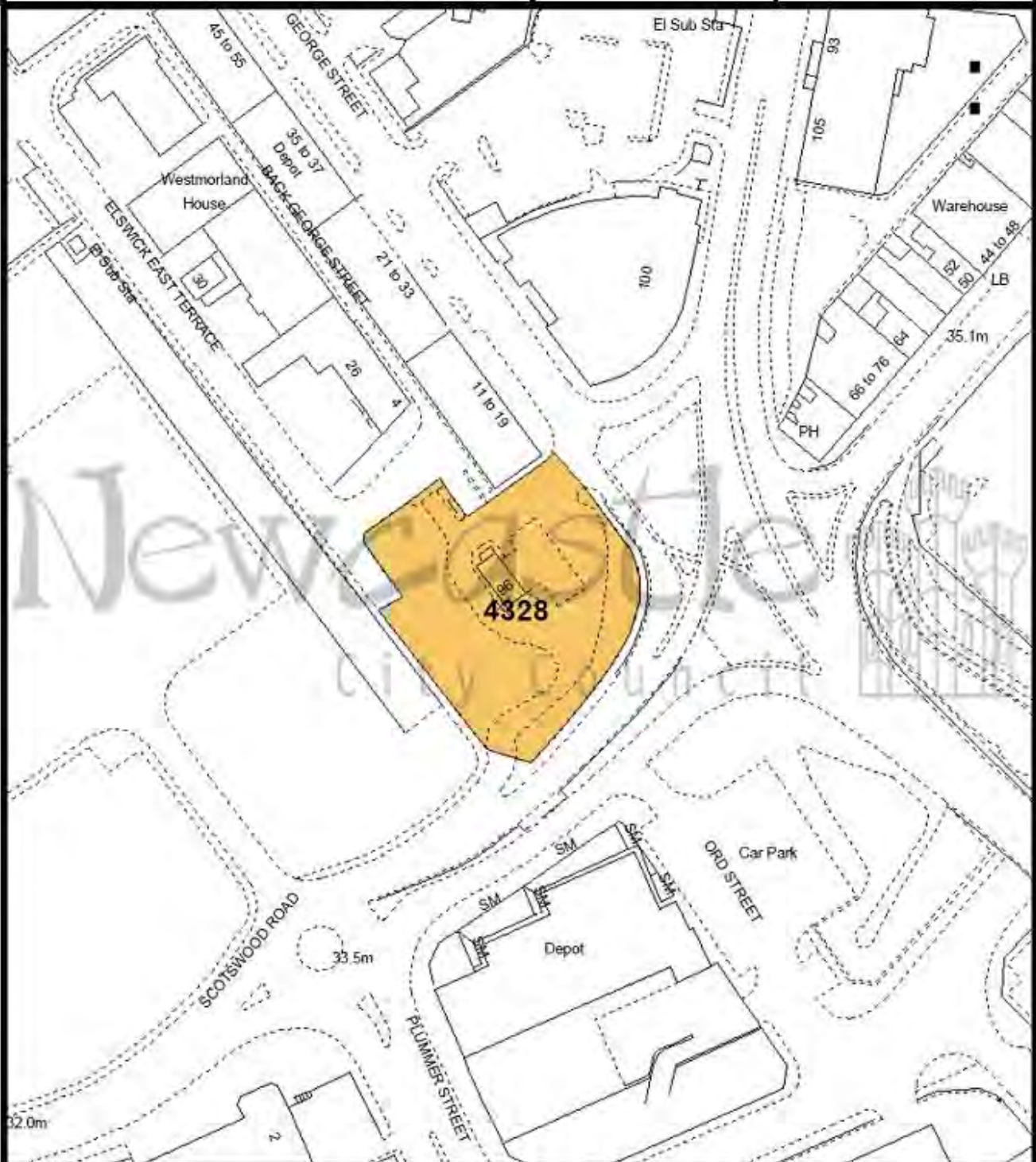
<p>Address : Hill Court Pitt Street</p>	<p>Area (Ha) : 0.38</p>	<p>Map : NZ 2464 SW</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3079: Pitt Street Site			
Area (hectares)	0.37 ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Existing block of flats in 3 blocks for short stay / homeless. Due to relocate such facilities for better serviced site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Considered as part of the EDAW Science Central Masterplan area. B1 uses or student housing. Site also considered as part of the SHLAA. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Requires site clearance. (2)
	√	√	√	
Internal Environment	Good	Average	Poor	Slopes from west to east. Abuts site 1411 to south which creates opportunities to link development. (3)
		√		
External Environment	Good	Average	Poor	Cleared sites, football stadium. B1, student housing, leisure in the future. (4)
		√		
Road Access	Good	Average	Poor	Via Pitt Street. (3)
	√			
Public Transport	Good	Average	Poor	Adjacent public transport routes. Accessibility Grade A (5)
	√			
Market Attractiveness	Good	Average	Poor	Prime location, well serviced and accessed. Site would function particularly well as purpose built student accommodation. (5)
	√			
Overall Assessment	Good	Average	Poor	Site will benefit from the proximity to Science Central and is unlikely to come forward for employment. (5)
		√		

TOTAL SCORE	33
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(Scoring: 5 = best, 1 = worst)



Address : Former petrol filling station
George Street/Scotswood Road

Area (ha) : 0.30

Map : NZ 2463 NW

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Date : 19/09/2006

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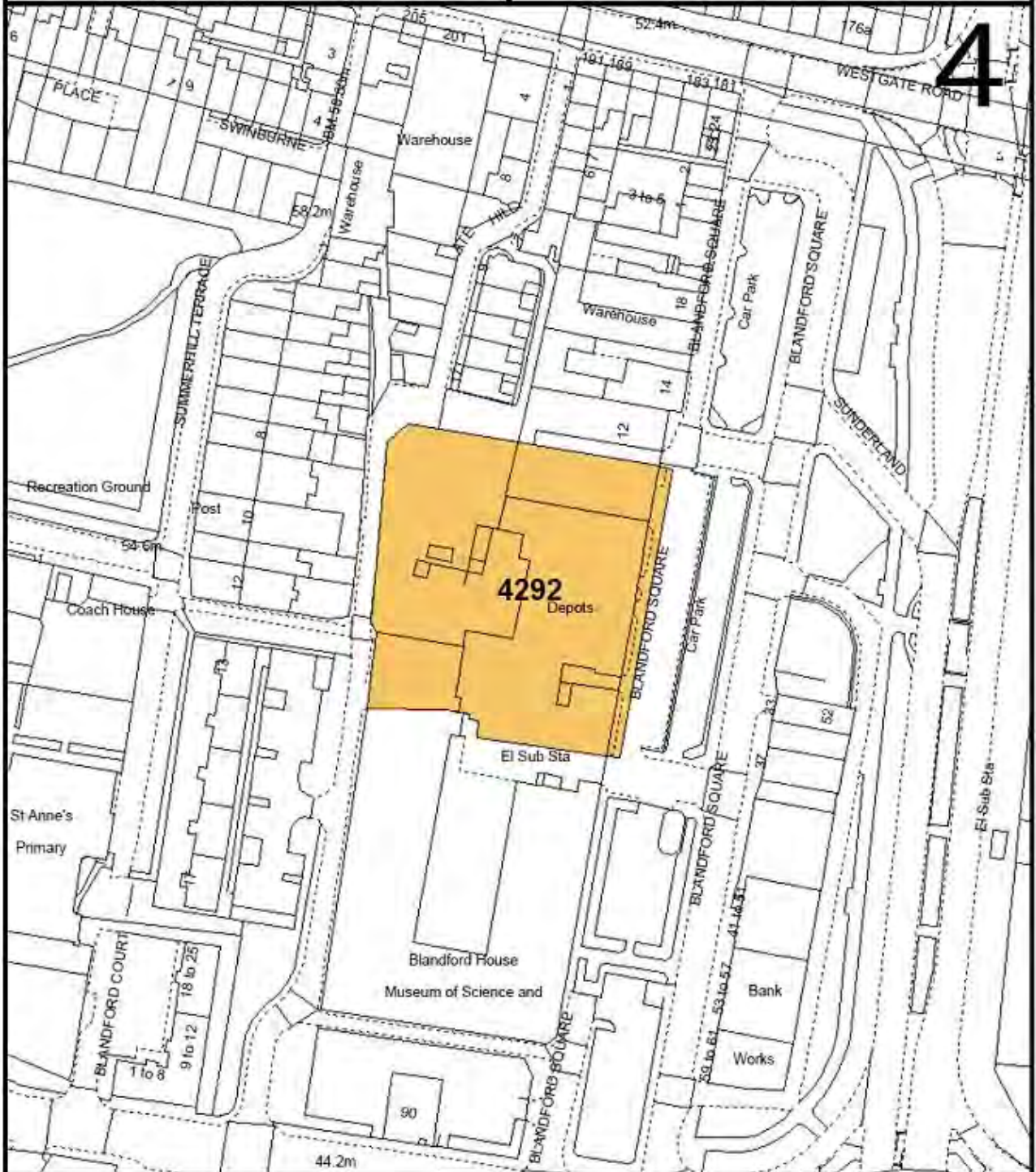
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4328: Former BP Petrol Filling Station, George Street			
Area (hectares)	0.30ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Cleared site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	No overriding policy constraints. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Cleared site. (4)
	√	√	√	
Internal Environment	Good	Average	Poor	Heavy tree cover to the southern boundary. Footpath dissects site. (3)
		√		
External Environment	Good	Average	Poor	Adjacent to Newcastle College. (3)
		√		
Road Access	Good	Average	Poor	Close proximity to the A1 and Scotswood Road (3)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade A. (5)
		√		
Market Attractiveness	Good	Average	Poor	Vacant site which has been identified for employment use. (4)
		√		
Overall Assessment	Good	Average	Poor	Due to proximity to Newcastle College the likelihood is that the site will be brought forward for educational use. (2)
			√	

TOTAL SCORE	30
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(Scoring: 5 = best, 1 = worst)



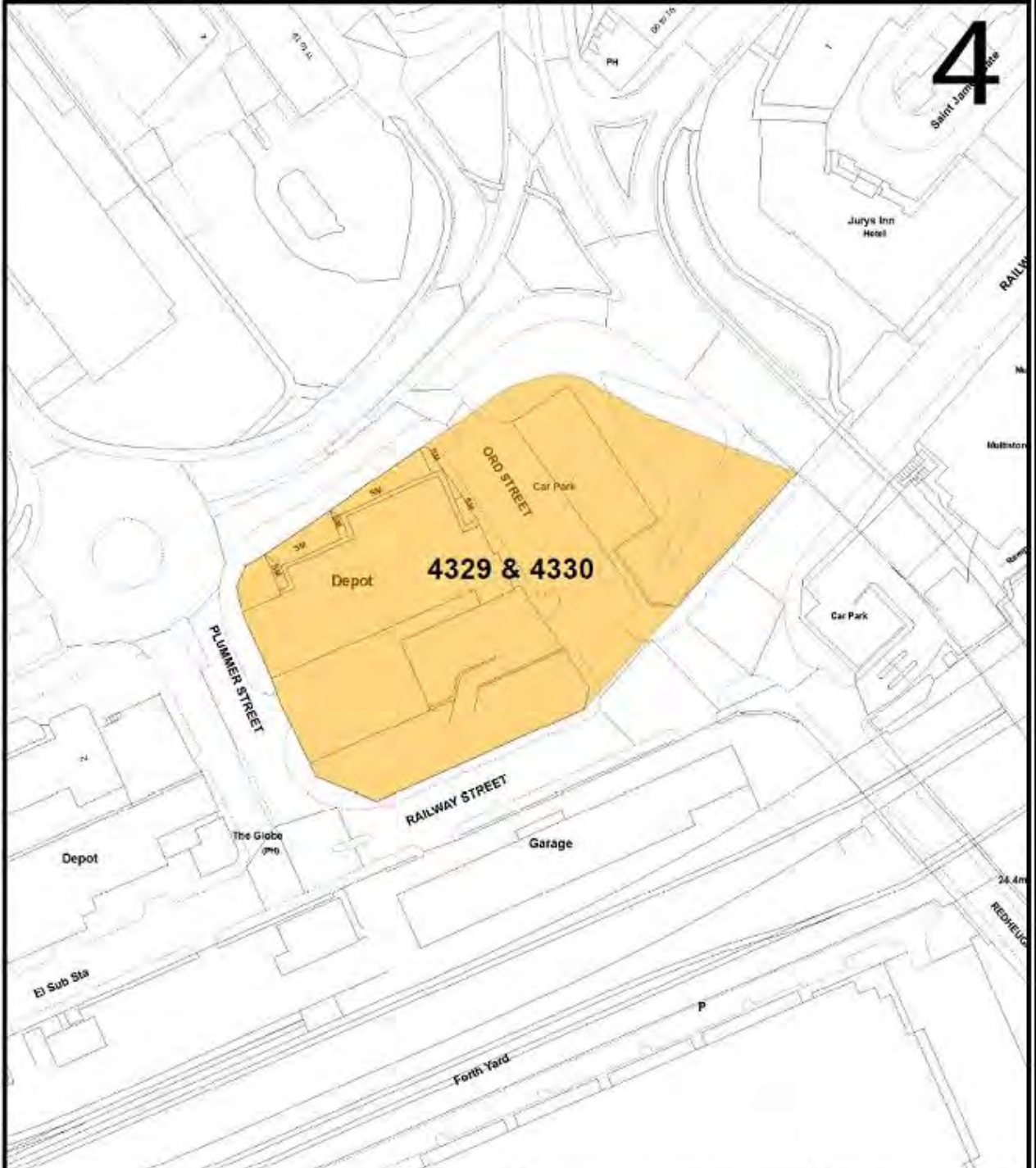
<p>Address : CWS Depot Blandford Square</p>	<p>Area (Ha) : 0.45</p>	<p>NZ 2464 SW Map : NZ 2463 NW</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I., Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4292: CWS Engineering Depot, Blandford Square, St James Boulevard		
Area (hectares)	0.45ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **NCC Coach Park
and WH Smith Depot**

Area (Ha) : **0.78**

Map : **NZ 2463 NW/SW**

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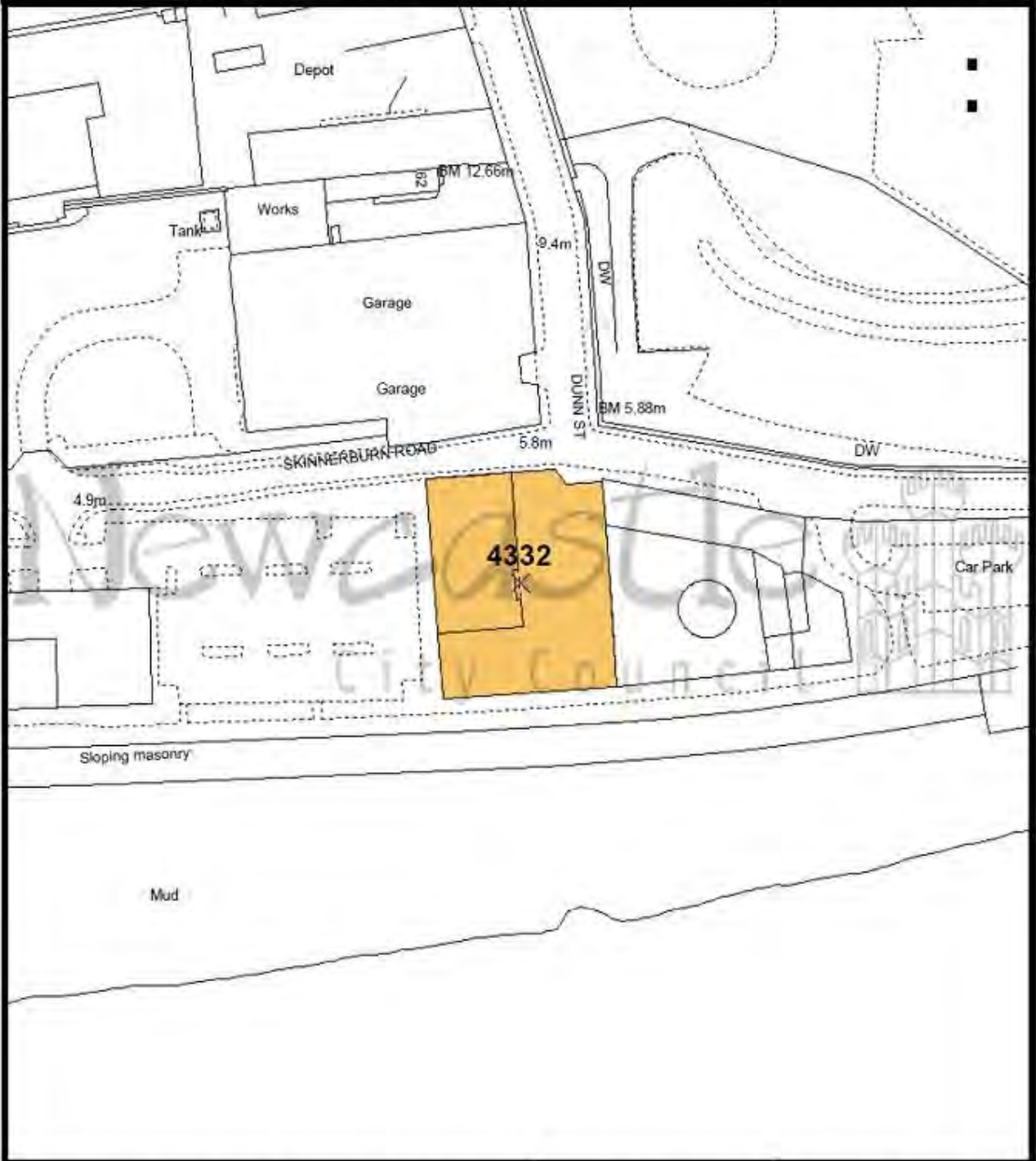
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4329 & 4330: Former WHS depot and coach park.		
Area (hectares)	0.78ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
			√
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	
Partially vacant warehouse on site. Remainder is existing coach park. (3)			
Depot allocated under ED3.1 of the UDP for employment. Considered as part of the 4 th Yard Study (2007). (3)			
Partially vacant. Depot site 4,200 sq.m in temporary use, coach park 1,393 sq.m. (2)			
Ord Street is a public highway and will need stopped up to facilitate development. (2)			
Mainly commercial and highways. Newcastle College to the north. (3)			
From Railway Street. Access not possible from Scotswood Road. (3)			
Highly accessible and central site. (Grade A+). (5)			
Recognised as a key site within the 4th Yard Masterplan Vision. Aspirations by McAleer and Rushe to progress a commercial and office development to include a hotel. (4)			
Prominent location, high potential demand. Existing occupiers would need to be relocated. (4)			

TOTAL SCORE	29
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(Scoring: 5 = best, 1 = worst)



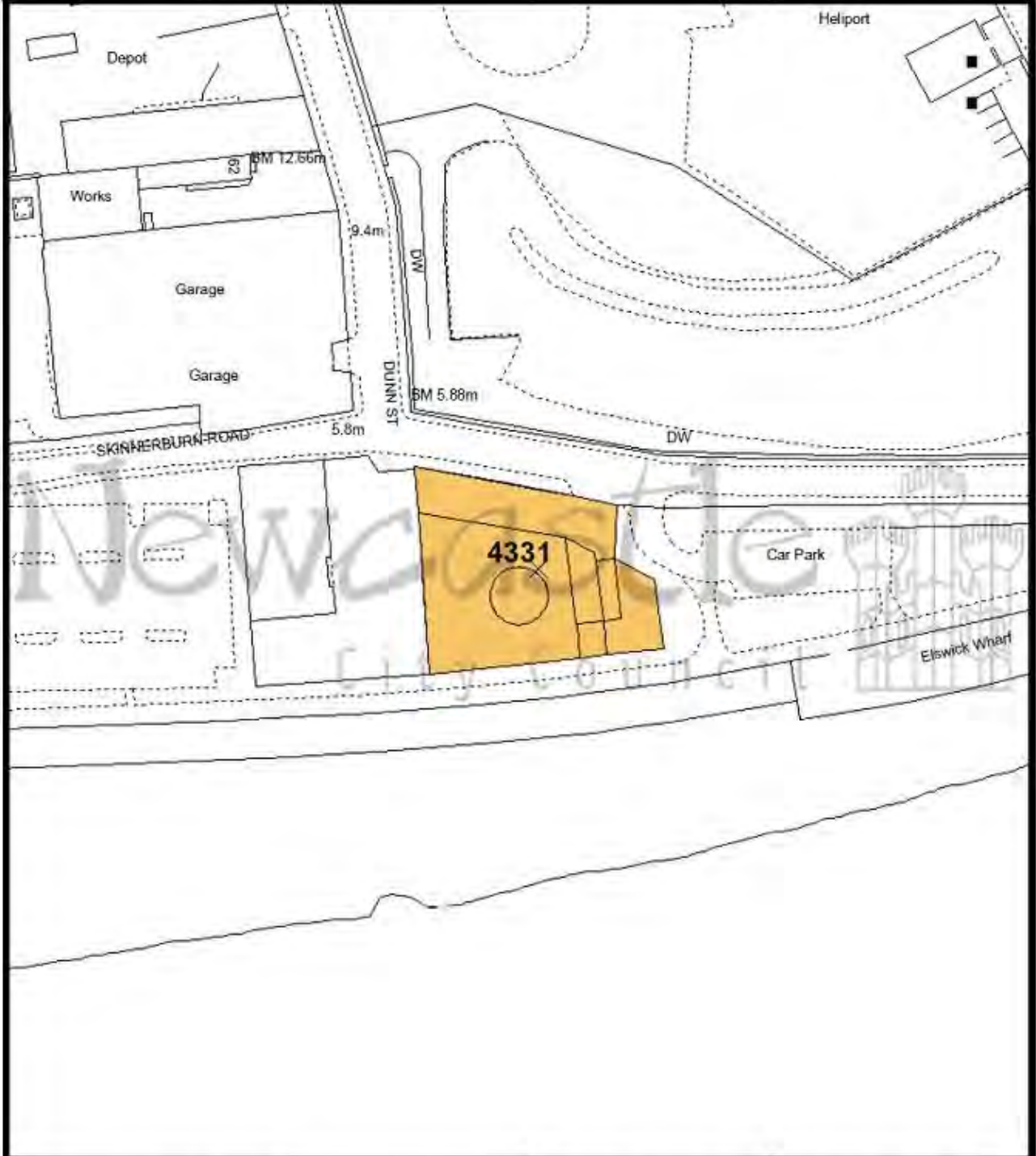
<p>Address : Land south of junction of Dunn Street and Skinnerburn Road</p>	<p>Area (ha) : 0.22</p>	<p>Map : NZ 2362 NE</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I., Head of Planning & Transportation Newcastle City Council, Civic Centre, Newcastle upon Tyne NE1 8PH</p>		<p>Tel: 0191 232 8520 Fax: 0191 211 4998</p>
<p>Scale : 1:1,250</p>	<p>Date : 20/09/2006</p>	<p>Drawn by : AM <small>Based on the 2006 Ordnance Survey Map with the permission of the Controller of H. M. S. O. Crown Copyright Reserved. LS 100010559. Newcastle City Council.</small></p>

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4332: Skinnerburn Road A			
Area (hectares)	0.21ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Unallocated in the UDP. Somewhat distant from urban core. (2)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant site, western section is vacant. Remains from a previous building are still visible on site. This section is derelict, overgrown and covered with rubbish. (3)
			√	
Internal Environment	Good	Average	Poor	Ground contamination. Previous industrial uses including oil storage facility. Site of archaeological interest and potential flood risk. (1)
			√	
External Environment	Good	Average	Poor	Surrounded by vacant land. (3)
		√		
Road Access	Good	Average	Poor	From Skinnerburn Road only. (3)
		√		
Public Transport	Good	Average	Poor	Grade B on the Public Accessibility Model. (4)
	√			
Market Attractiveness	Good	Average	Poor	Historic enquiries for B1 development, unlikely to come forward in the current climate. (2)
			√	
Overall Assessment	Good	Average	Poor	Fairly isolated and peripheral site though within city centre boundary – discount. (2)
			√	

TOTAL SCORE	23
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land south of
Skinnerburn Road

Area (ha) : 0.22

Map : NZ 2362 NE

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Date : 20/09/2006

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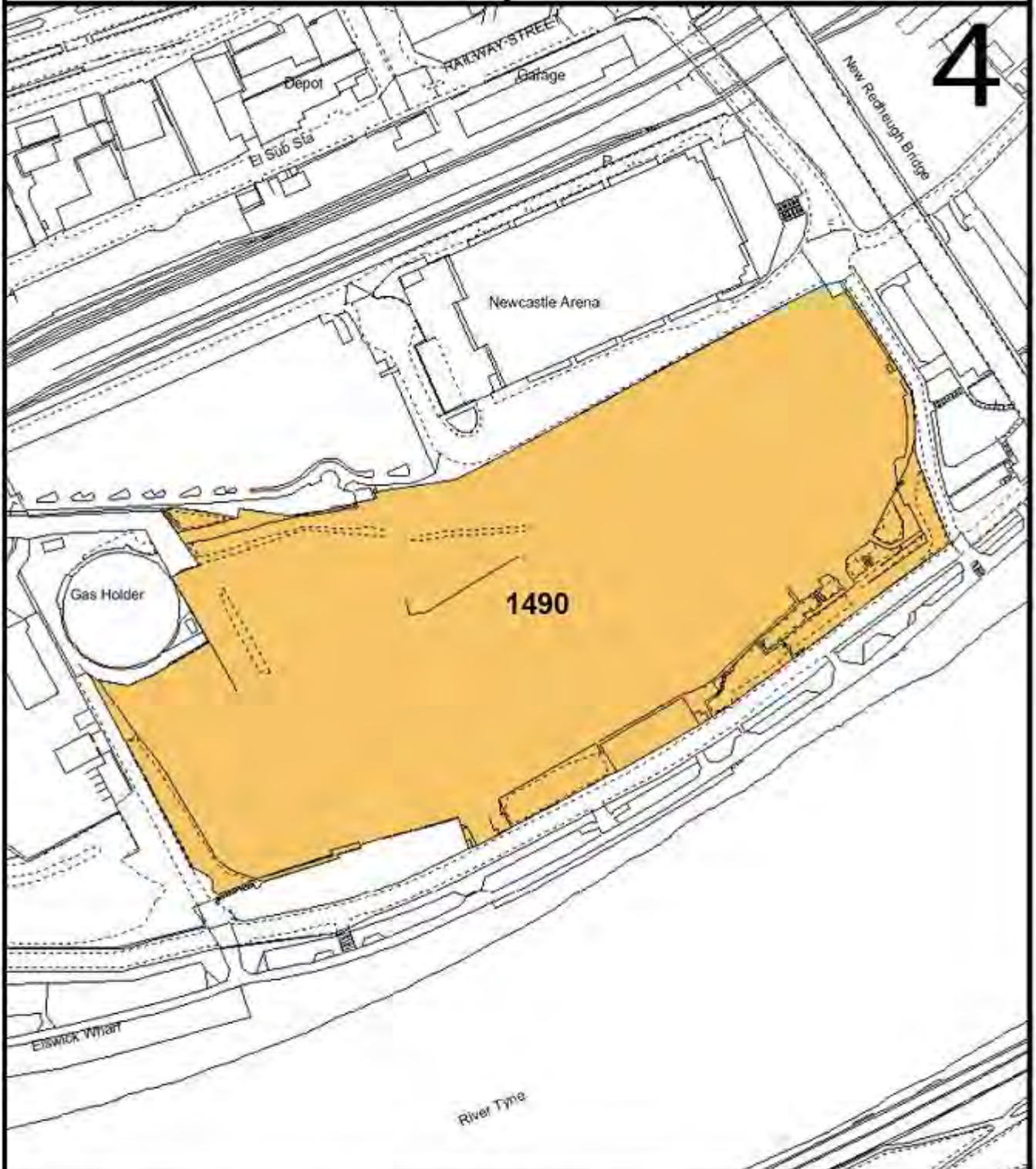
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4332: Skinnerburn Road B			
Area (hectares)	0.21ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Unallocated in the UDP. Somewhat distant from urban core. (2)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant site, western section is vacant. Remains from a previous building are still visible on site. This section is derelict, overgrown and covered with rubbish. (3)
			√	
Internal Environment	Good	Average	Poor	Ground contamination. Previous industrial uses including oil storage facility. Site of archaeological interest and potential flood risk. (1)
			√	
External Environment	Good	Average	Poor	Surrounded by vacant land. (3)
		√		
Road Access	Good	Average	Poor	From Skinnerburn Road only. (3)
		√		
Public Transport	Good	Average	Poor	Grade B on the Public Accessibility Model. (4)
	√			
Market Attractiveness	Good	Average	Poor	Historic enquiries for B1 development, unlikely to come forward in the current climate. (2)
			√	
Overall Assessment	Good	Average	Poor	Fairly isolated and peripheral site though within city centre boundary – discount. (2)
			√	

TOTAL SCORE	23
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Calder Industrial Materials
Skinnerburn Road**

Area (Ha) : 6.20

Map : **NZ 2363 SE
NZ 2463 SW**

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Date of
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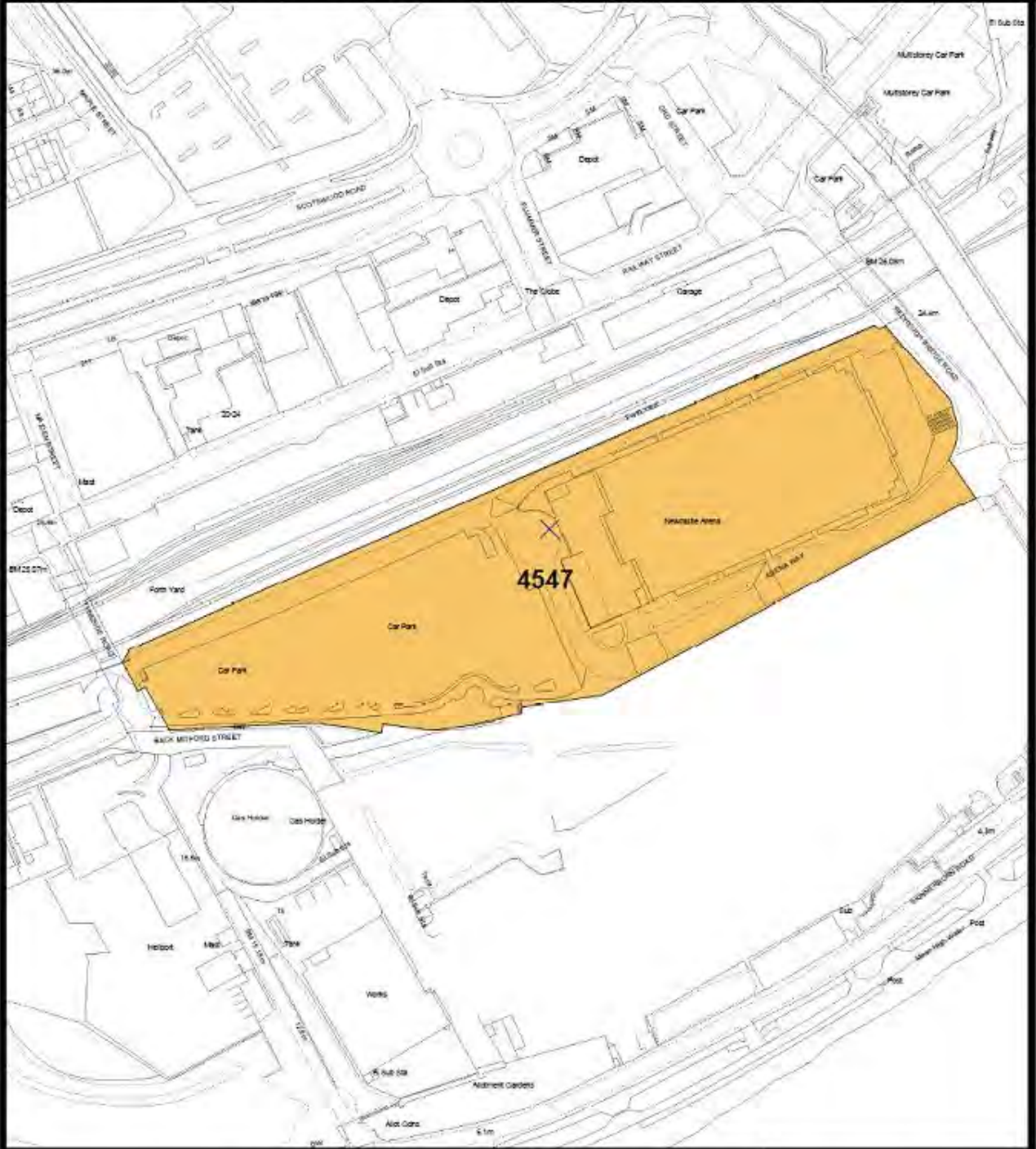
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1490: Calder Industrial Materials			
Area (hectares)	6.20ha			
Current Use	Office	Industrial	Mixed	Vacant commercial. (4)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	No overriding policy constraints. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Subject to the land owner bringing the site forward. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Remains of previous buildings are still available on site. (3)
		√		
External Environment	Good	Average	Poor	Adjacent to gas holder and railway line. Former leadworks – significant contamination and access issues. (1)
		√		
Road Access	Good	Average	Poor	Close proximity to the A1 and Scotswood Road. (3)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade A. (5)
		√		
Market Attractiveness	Good	Average	Poor	Viability an issue due to current market conditions and costs to de-risk the site. (4)
		√		
Overall Assessment	Good	Average	Poor	The site has planning permission for housing but ultimately may come forward for mixed use. (2)
			√	

TOTAL SCORE	26
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Metro Radio Arena
Arena Way

Area (ha) : 3.66

Map : NZ 2363 SE
NZ 2463 SW

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Date of
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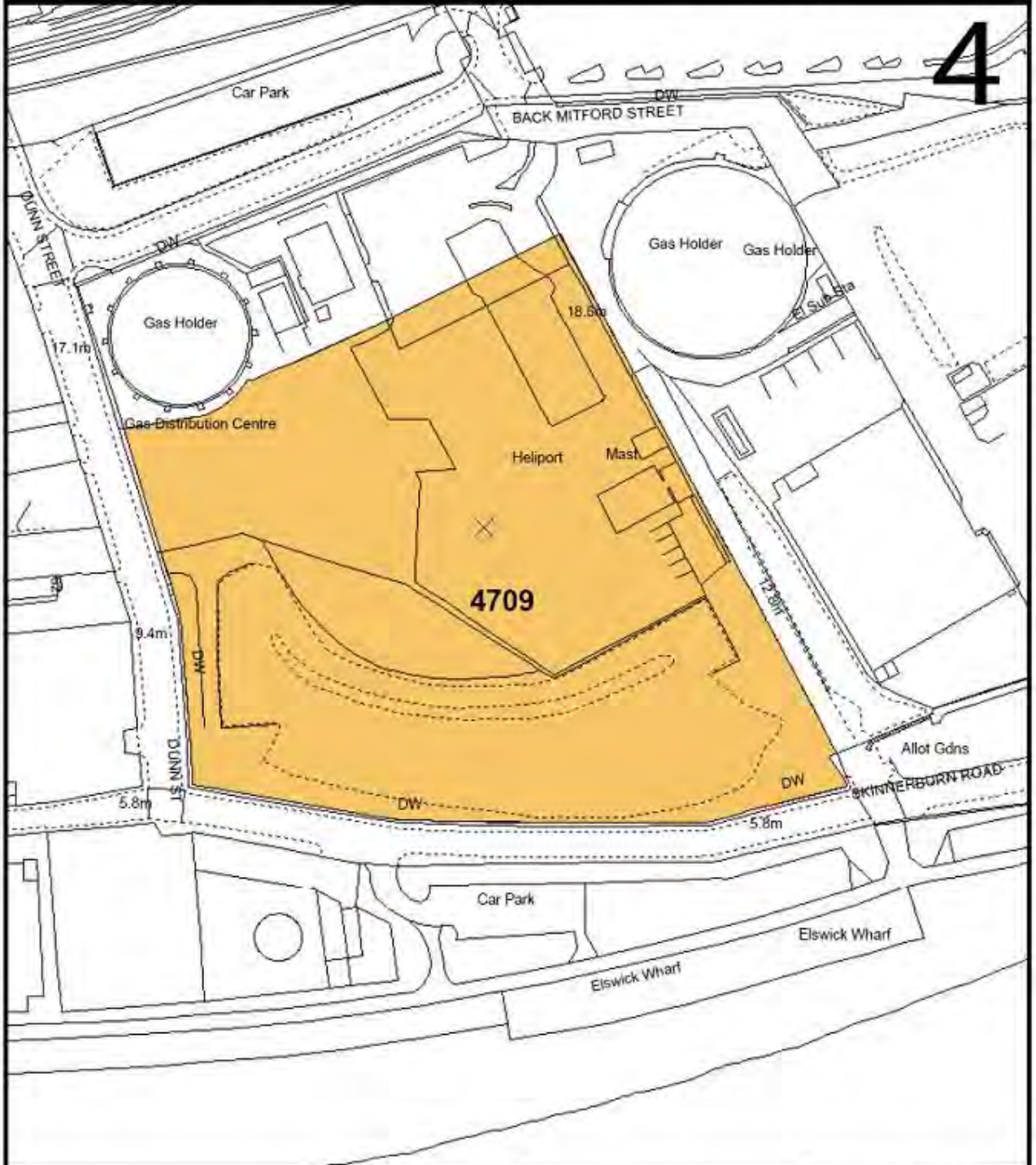
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4547: Metro Radio Arena			
Area (hectares)	3.65ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Current location of Arena and car park. (3)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. Considered as part of the 4 th Yard Study (2007) (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Metro Arena would require a new site. (0)
			√	
Internal Environment	Good	Average	Poor	Level site on raised plateau above, adjacent former leadworks site. Approx two thirds of the site constitutes surface parking. (2)
		√		
External Environment	Good	Average	Poor	Railway/industrial to north, east and west. (2)
		√		
Road Access	Good	Average	Poor	Via Redheugh Bridge Road to east and Dunn Street to west. Both have headroom issues if connecting to wider strategic highways network. (2)
		√		
Public Transport	Good	Average	Poor	5 minutes to Central Station. Public Transport Accessibility Grade A. (5)
	√			
Market Attractiveness	Good	Average	Poor	Previously proposals / aspirations included a potential regional casino bid and scope to upgrade to a 10,000 seater with moveable seats in the style of an amphitheatre. (2)
		√		
Overall Assessment	Good	Average	Poor	Remove from database and retain as Arena. (0)

TOTAL SCORE	19
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Newcastle City Heliport
Skinnerburn Road

Area (Ha) : 2.31

Map : NZ 2363 SE
NZ 2463 SW
NZ 2362 NE
NZ 2462NW

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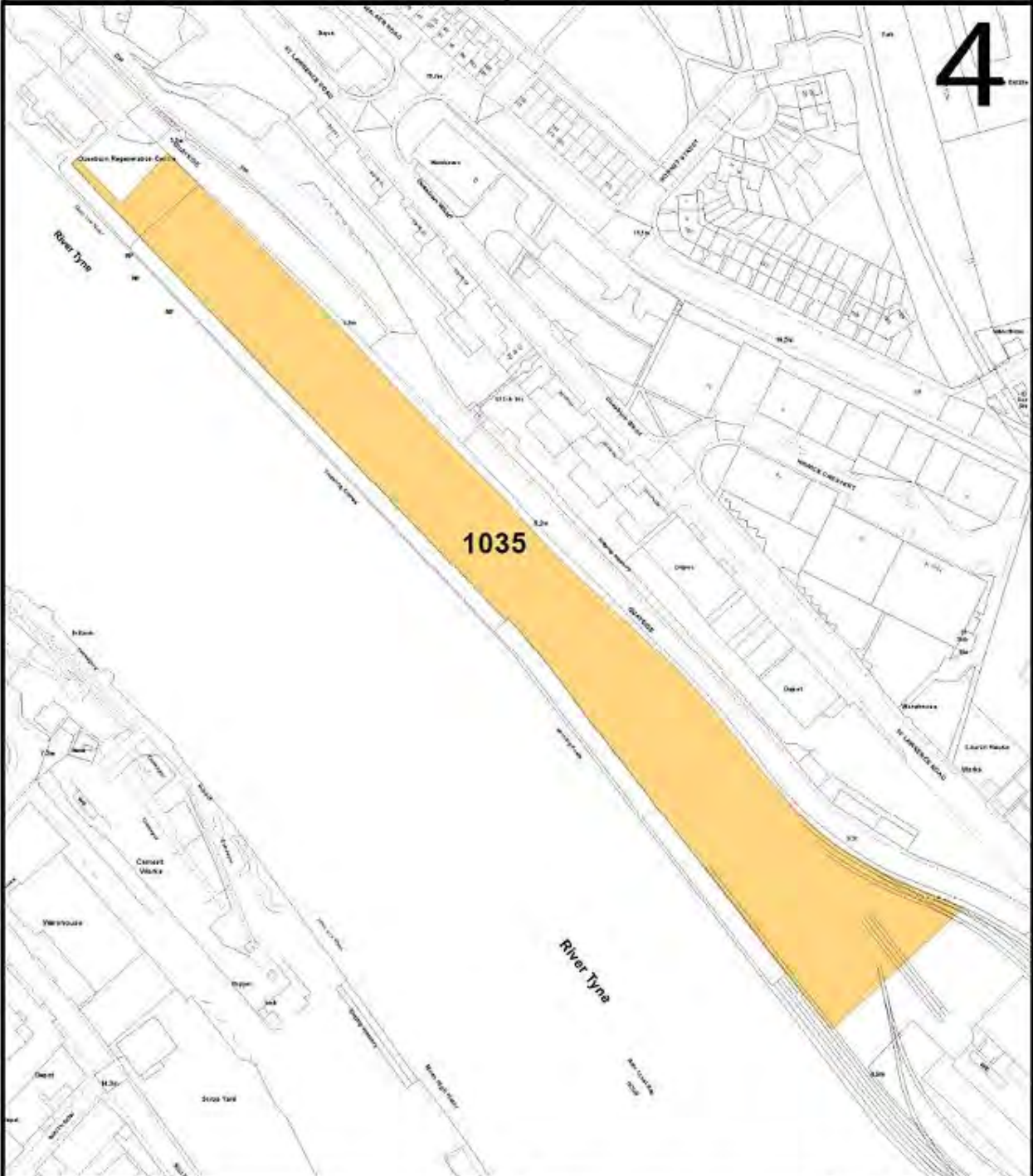
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4709: Newcastle Heliport			
Area (hectares)	2.31			
Current Use	Office N/A	Industrial N/A	Mixed N/A	Operational heliport. (3)
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Subject to the heliport being relocated. (2)
Internal Environment	Good	Average	Poor	
External Environment	Good	Average	Poor	Flat site, but set at height due to topography of the land. Large retaining wall to Skinnerburn Road making site highly visible from Gateshead. (2)
Road Access	Good	Average	Poor	
Public Transport	Good	Average	Poor	Gas holder which also shares access. Site within red and green zones - see http://www.hse.gov.uk/landuseplanning/padhi.pdf for zones and uses. (1)
Market Attractiveness	Good	Average	Poor	
Overall Assessment	Good	Average	Poor	Limited height access due to railway bridges, but otherwise good access to the strategic road network. (2)
				Public Transport Accessibility Grade A. (5)
				Landowner submitted site for consideration for housing as part of SHLAA call-out. (2)
				Likely to remain in existing use due to viability constraints and the adjacent gas holder. (2)

TOTAL SCORE	22
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : Spillers Quay

Area (Ha) : 1.54

Map : NZ 2663 NE
NZ 2664 SE

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Scale : 1:2,000 @ A4

Date of
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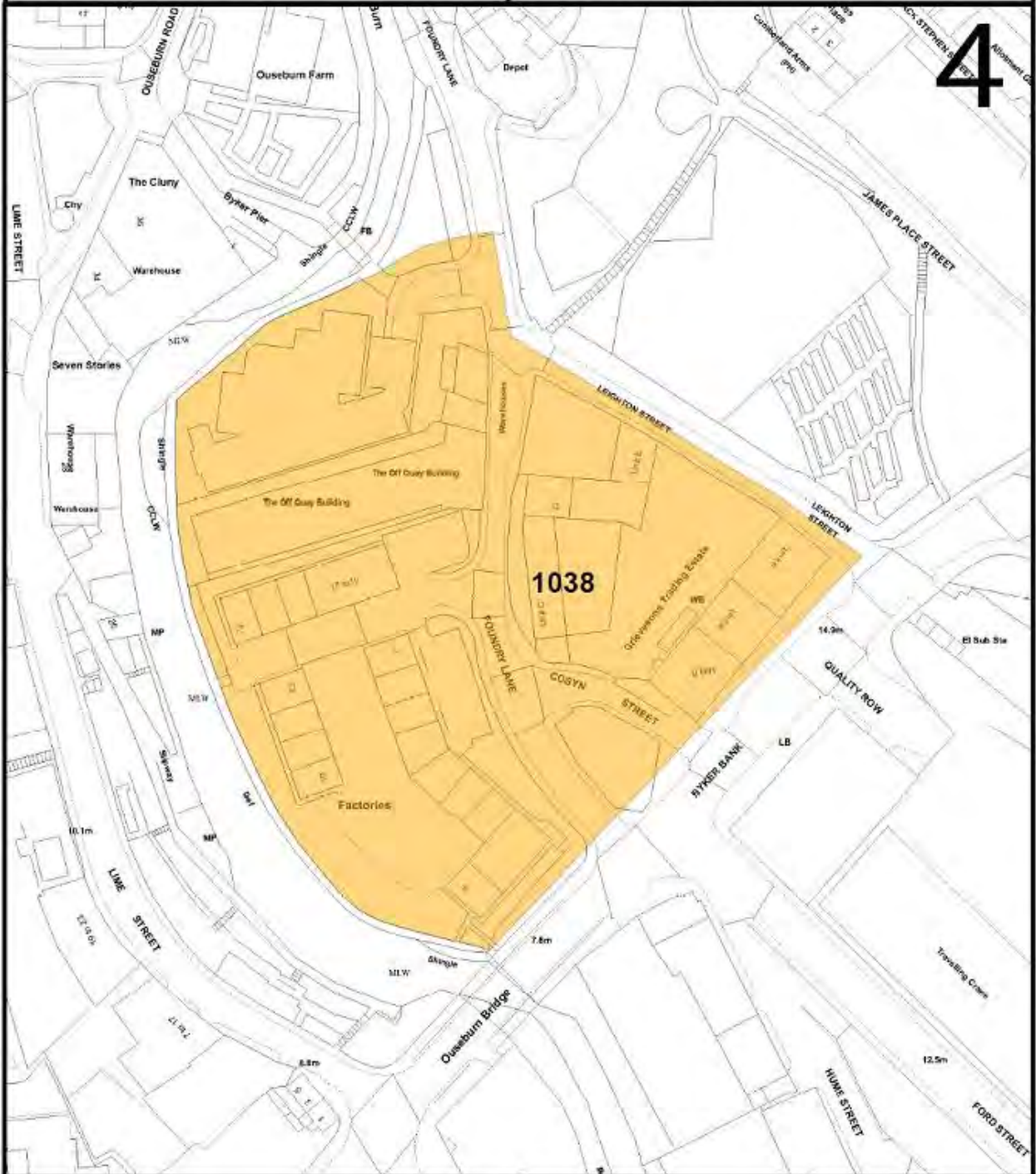
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1035: Spillers Quay			
Area (hectares)	1.54ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Vacant land, former deep water berth for shipping. Part of the UCAAP. (4)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Unallocated within UDP. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' to come forward for leisure and commercial uses. 3,150 sq.m and potentially 6,505 sq.m of B1 floorspace. (5)
	√	√		
Internal Environment	Good	Average	Poor	Vacant land, flood risk. (3)
		√		
External Environment	Good	Average	Poor	Principally commercial adjacent to Spillers Mill which is one of 5 priorities being brought forward by 1NG under Phase 1 of the 'Ouseburn and East Quayside Development Framework'. (3)
		√		
Road Access	Good	Average	Poor	St Lawrence Road & Quayside. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink bus service. (4)
	√			
Market Attractiveness	Good	Average	Poor	Made land – not suitable (1)
	√			
Overall Assessment	Good	Average	Poor	Not suitable. (1)
		√		

TOTAL SCORE	27
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : Ouseburn Central

Area (Ha) : 1.66

Map : NZ 2664 NW SW

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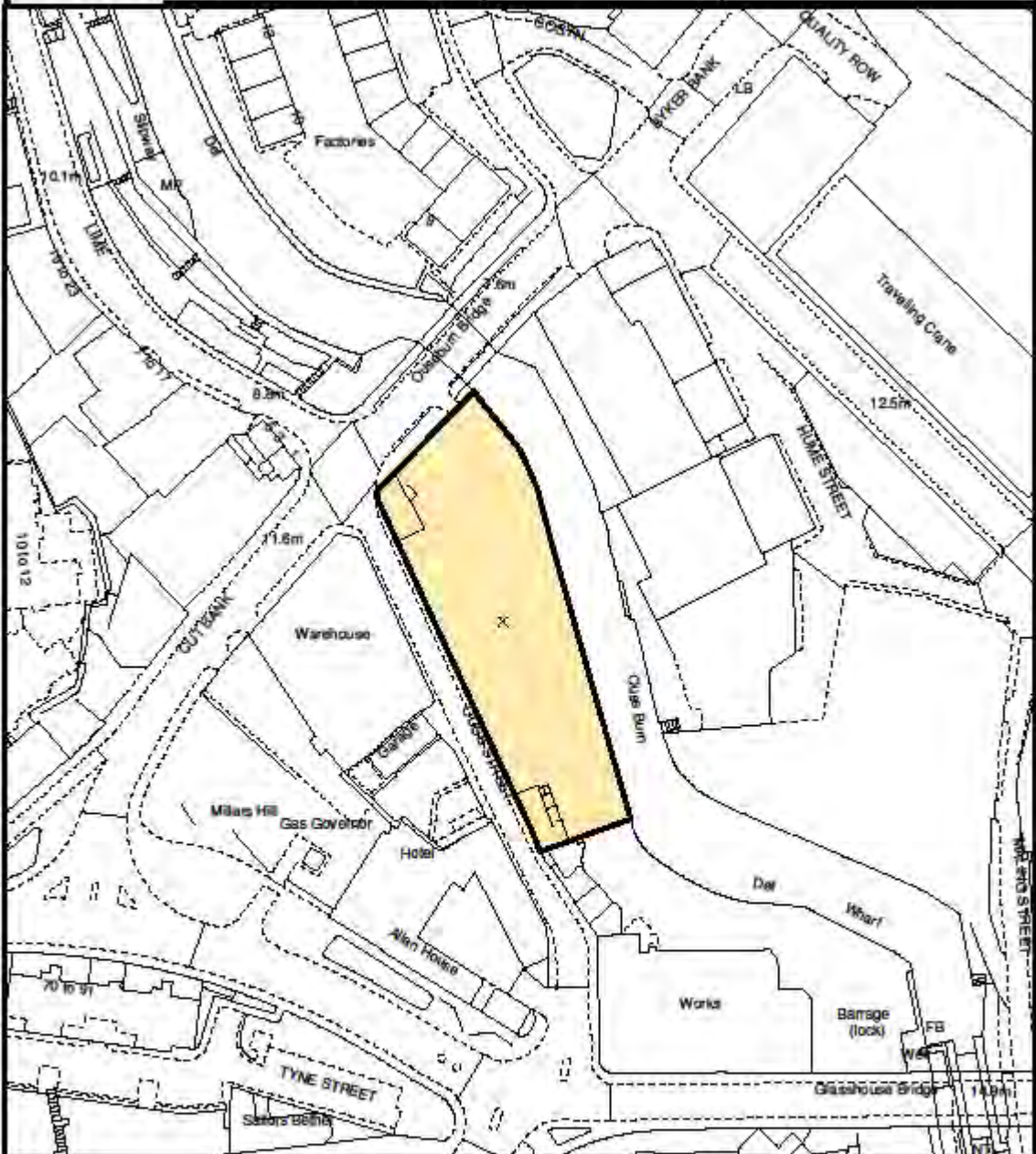
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1038: Ouseburn Central		
Area (hectares)	1.66ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		
Used as a surface car park, small business workshops including Off Quay Building and older industrial units at Brewery Yard area. (3)			
Central Ouseburn SPD identifies site for B1 led redevelopment. (4)			
1NG study by GVA Grimley (May 2009) identifies Ouseburn Central as accommodating up to 4,000 sq.m of B1/SME floorspace. (4)			
Former McPhees Yard contaminants on site. (2)			
Principally commercial. (4)			
Foundry Lane runs through the site. (3)			
Quaylink bus service.(4)			
High demand anticipated as part of wider regeneration of the area.(4)			
The regeneration of the Ouseburn is a medium / long term prospect for the city and specific land use proposals should be flexible and respond to the market. However, this site is already developed with starter units. It is in multiple ownership and is unlikely to be deliverable. (2)			

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Steenbergs Lower Yard Ouse Street	Area (Ha) : 0.31	Map: 2664SW
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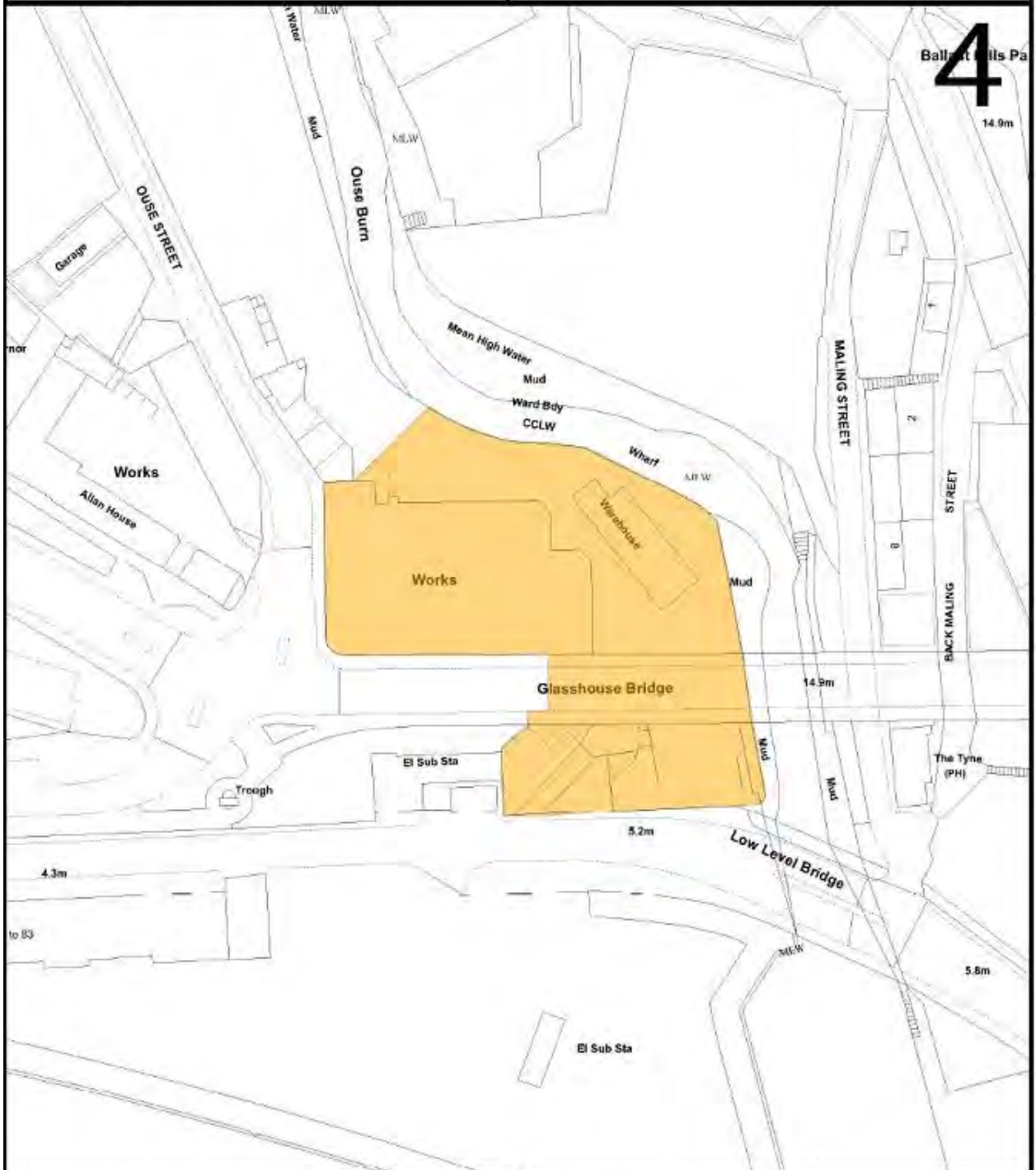
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5290: Lower Steenberg's Yard			
Area (hectares)	0.31ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant, partially cleared site. The Lower Steenberg's area is adjacent to the historic Toffee Factory, Glasshouse Bridge and the land between the Ouseburn quay walls and Ouse Street. (5)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' to come forward for commercial uses (4,744 sq.m. of B1 floorspace). (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant, partially cleared site. The redevelopment of Lower Steenberg's will follow the Toffee Factory. (4)
		√		
Internal Environment	Good	Average	Poor	Severely contaminated. 1NG commissioning remediation and de-risking works. Site is within EA flood zone. (3)
		√		
External Environment	Good	Average	Poor	Part of Ouseburn and East Quayside Regeneration area. (4)
	√			
Road Access	Good	Average	Poor	Via Ouse Street. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink bus service. (4)
	√			
Market Attractiveness	Good	Average	Poor	High demand anticipated as part of the wider regeneration of the Ouseburn. Likely to come forward for mixed use offices / residential (4)
	√			
Overall Assessment	Good	Average	Poor	The Lower Steenberg's quay will provide a green ecological edge to contrast the more urban public space on the east bank. (4)
	√			

TOTAL SCORE	35
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Toffee Factory

Area (Ha) : 0.43

Map : NZ 2664 SW

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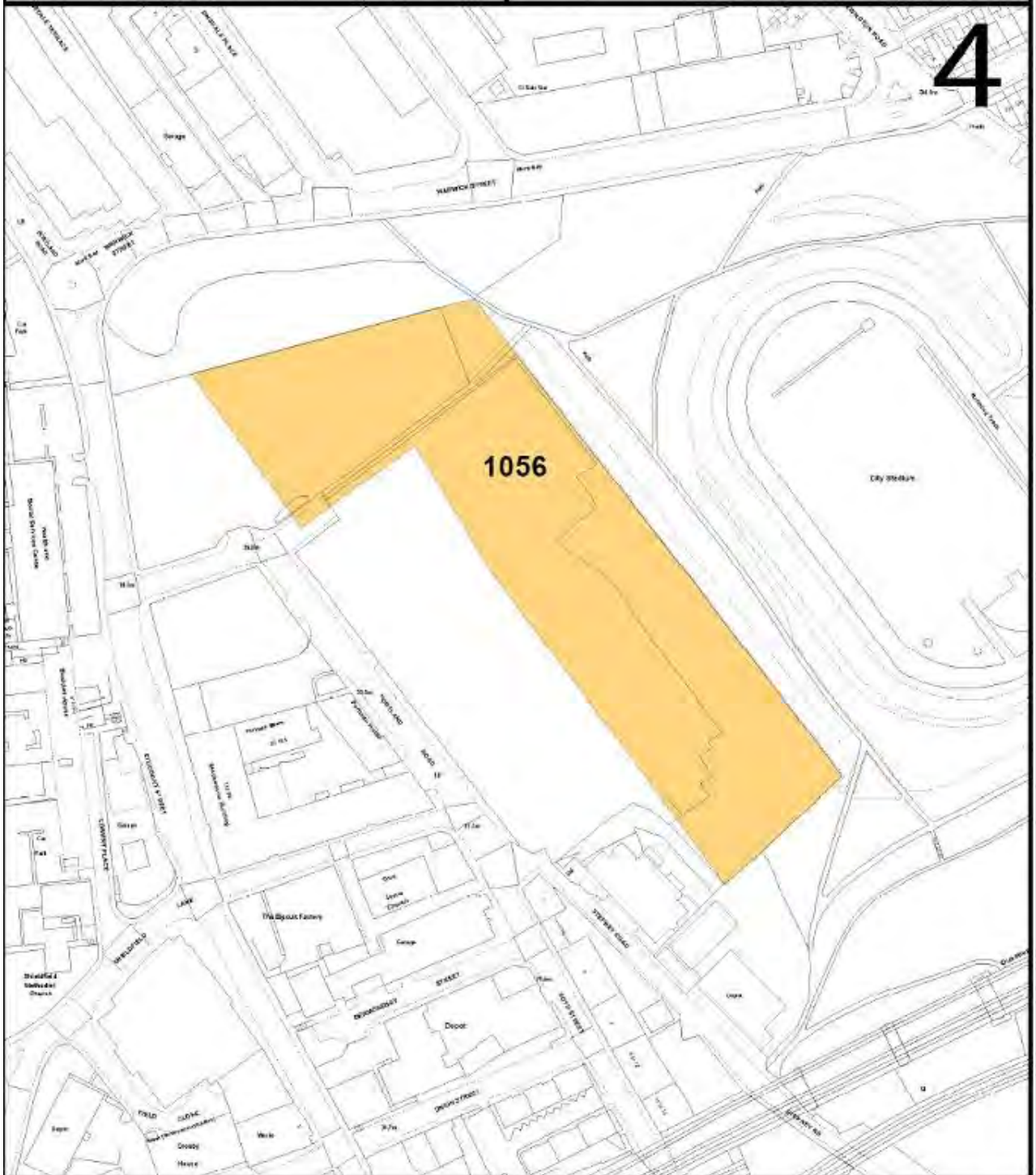
Drawn By:
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1039: Toffee Factory			
Area (hectares)	0.43ha			
Current Use	Office	Industrial	Mixed	Vacant, partially cleared site. The Lower Steenbergers area include the historic Toffee Factory adjacent to Glasshouse Bridge and the land between the Ouseburn quay walls and Ouse Street. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' to come forward for commercial uses (2,584 sq.m. of B1 floorspace). (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	As above. Application submitted for 2010/0151/01/DET 4,976 sq.m (2,367 sq.m office space / 2,609 sq.m. B1). (5)
	√			
Internal Environment	Good	Average	Poor	Severely contaminated. 1NG commissioning remediation and de-risking works. (2)
		√		
External Environment	Good	Average	Poor	Part of Ouseburn and East Quayside Regeneration area. (5)
	√			
Road Access	Good	Average	Poor	Via Ouse Street. (5)
		√		
Public Transport	Good	Average	Poor	Public Transport Accessibility Grade A. Quaylink bus service. (5)
		√		
Market Attractiveness	Good	Average	Poor	High demand anticipated as part of the wider regeneration of the Ouseburn. (5)
	√			
Overall Assessment	Good	Average	Poor	The Toffee Factory provides a unique structure which is to be refurbished as business space. This provides a great opportunity for 'second move' employment accommodation from those who have outgrown the Quayside Business Development Centre. (5)
	√			

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Portland Road
Phase 2**

Area (Ha) : **1.75**

Map : **NZ 2564 NE
NZ 2664 NW**

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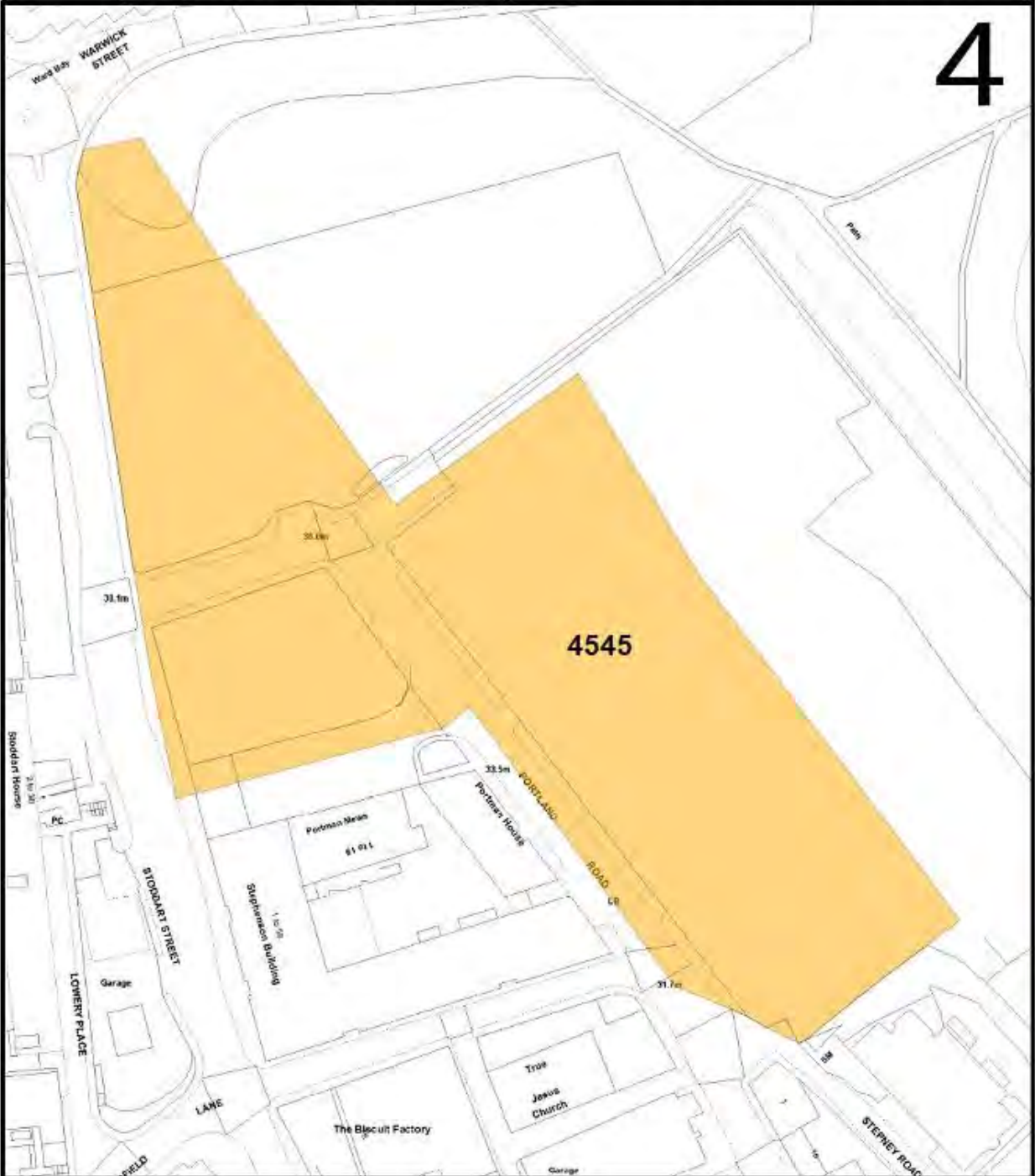
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1056: Portland Road Phases 2			
Area (hectares)	1.75ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant land at present. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Existing permission (2008/0758/01/DET) for B1 office space (11,425sq.m.) and 2,000 student bed spaces. (4)
	√	√		
Internal Environment	Good	Average	Poor	Contamination anticipated. Internal highways to be retained. (3)
		√		
External Environment	Good	Average	Poor	Adjacent to purpose built student accommodation. (3)
		√		
Road Access	Good	Average	Poor	Portland Road. (3)
	√			
Public Transport	Good	Average	Poor	Highly accessible location, close proximity to the City Centre. (3)
	√			
Market Attractiveness	Good	Average	Poor	Development has stalled due to current market conditions. (2)
		√		
Overall Assessment	Good	Average	Poor	Site is to be comprehensively redeveloped, mainly for student housing. B1 development looks uncertain. (2)
		√		

TOTAL SCORE	26
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : **Portland Road
Phase 1A and 1B**

Area (Ha) : 1.76

Map : NZ 2564 NE

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Scale : 1:1,250 @ A4

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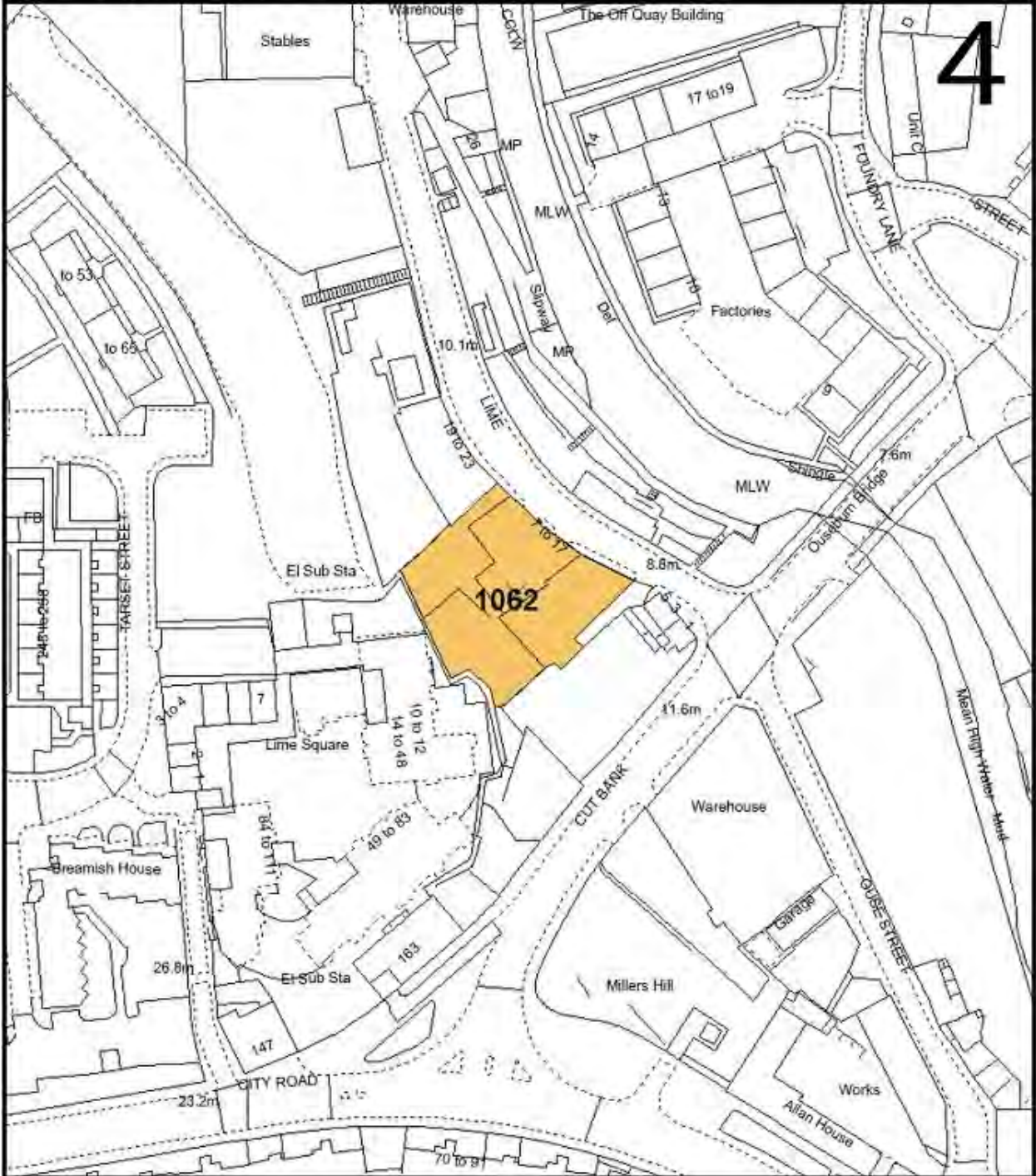
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4545: Portland Road Phases 1A and 1B			
Area (hectares)	1.76ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant land at present. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Existing permission (2007/2238/01/DET) for B1 office space, small supermarket and parking. (3)
	√	√		
Internal Environment	Good	Average	Poor	Contamination anticipated. Internal highways to be retained. (2)
		√		
External Environment	Good	Average	Poor	Adjacent to purpose built student accommodation. (2)
		√		
Road Access	Good	Average	Poor	Via Portland Road. (3)
	√			
Public Transport	Good	Average	Poor	Highly accessible location, close proximity to the City Centre. (5)
	√			
Market Attractiveness	Good	Average	Poor	Development has stalled due to current market conditions. (3)
		√		
Overall Assessment	Good	Average	Poor	Site is to be comprehensively redeveloped, mainly for student housing. B1 development in the short term looks unlikely. (3)
		√		

TOTAL SCORE	27
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Site of 7 - 17 Lime Street

Area (Ha) : 0.16

Map : NZ 2664 SW

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Date of
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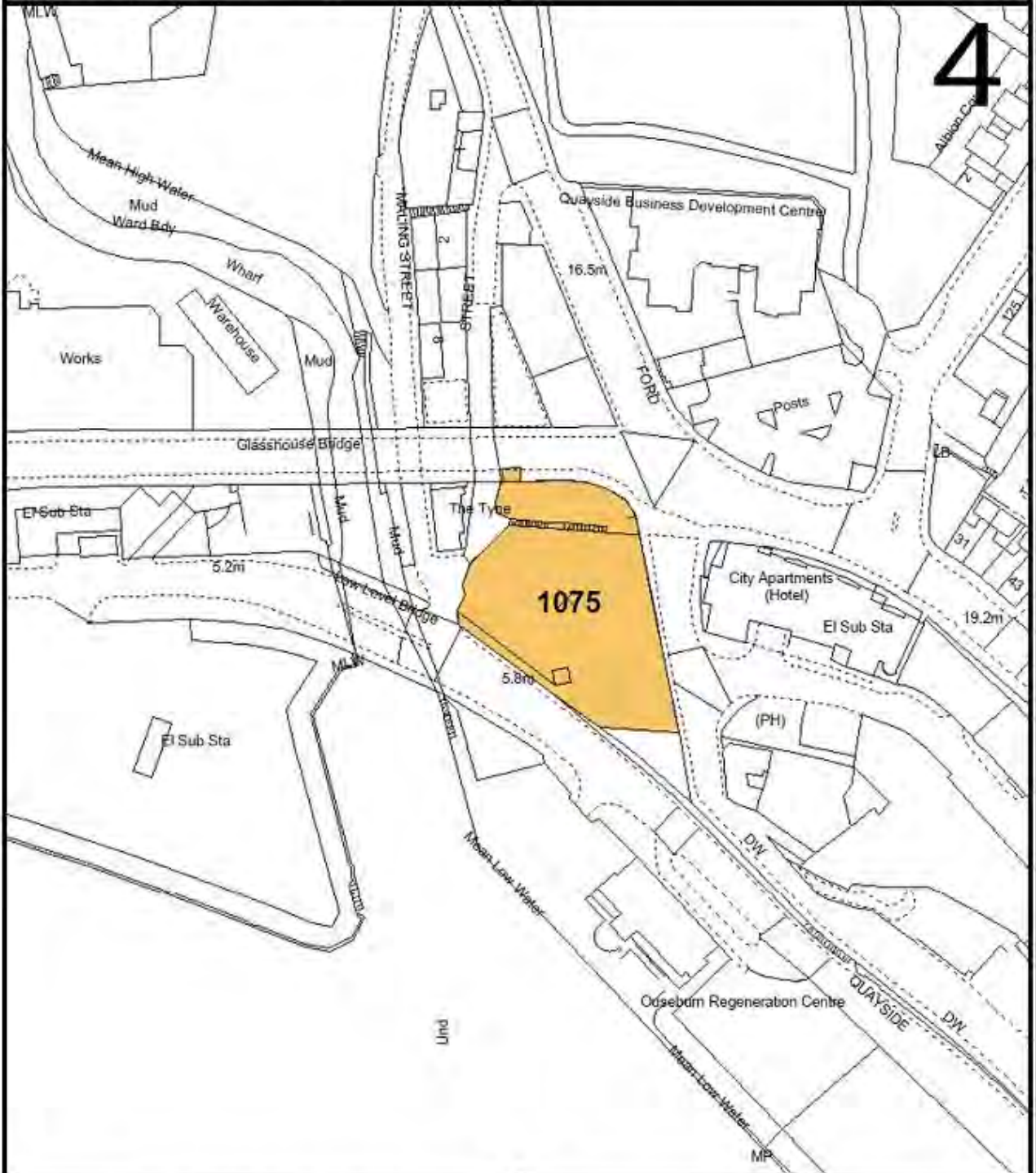
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1062: 7 – 17 Lime Street		
Area (hectares)	0.16ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	
			<p>Vacant former garage premises. (3)</p> <p>Lower Ouseburn Conservation area. Application (withdrawn) 2006/1241/01/DET for 4/6 storey building retail, office and 30 flats. (3)</p> <p>Vacant site. (3)</p> <p>Site lies at the foot of a steep bank. (2)</p> <p>Vacant B1/B8 land uses. (3)</p> <p>From Lime Street only. (3)</p> <p>Quaylink bus service. (4)</p> <p>Unlikely to come forward in the short term due to current market conditions. (1)</p> <p>The regeneration of the Ouseburn is a long term prospect for the city and specific land use proposals should be flexible and respond to the market. The site is too small for inclusion within the Employment Land Review and has therefore been discounted. (3)</p>

TOTAL SCORE	27
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land west of the Free Trade Inn
Saint Lawrence Road

Area (Ha) : 0.22

Map : NZ 2664 SW
NZ 2664 SE

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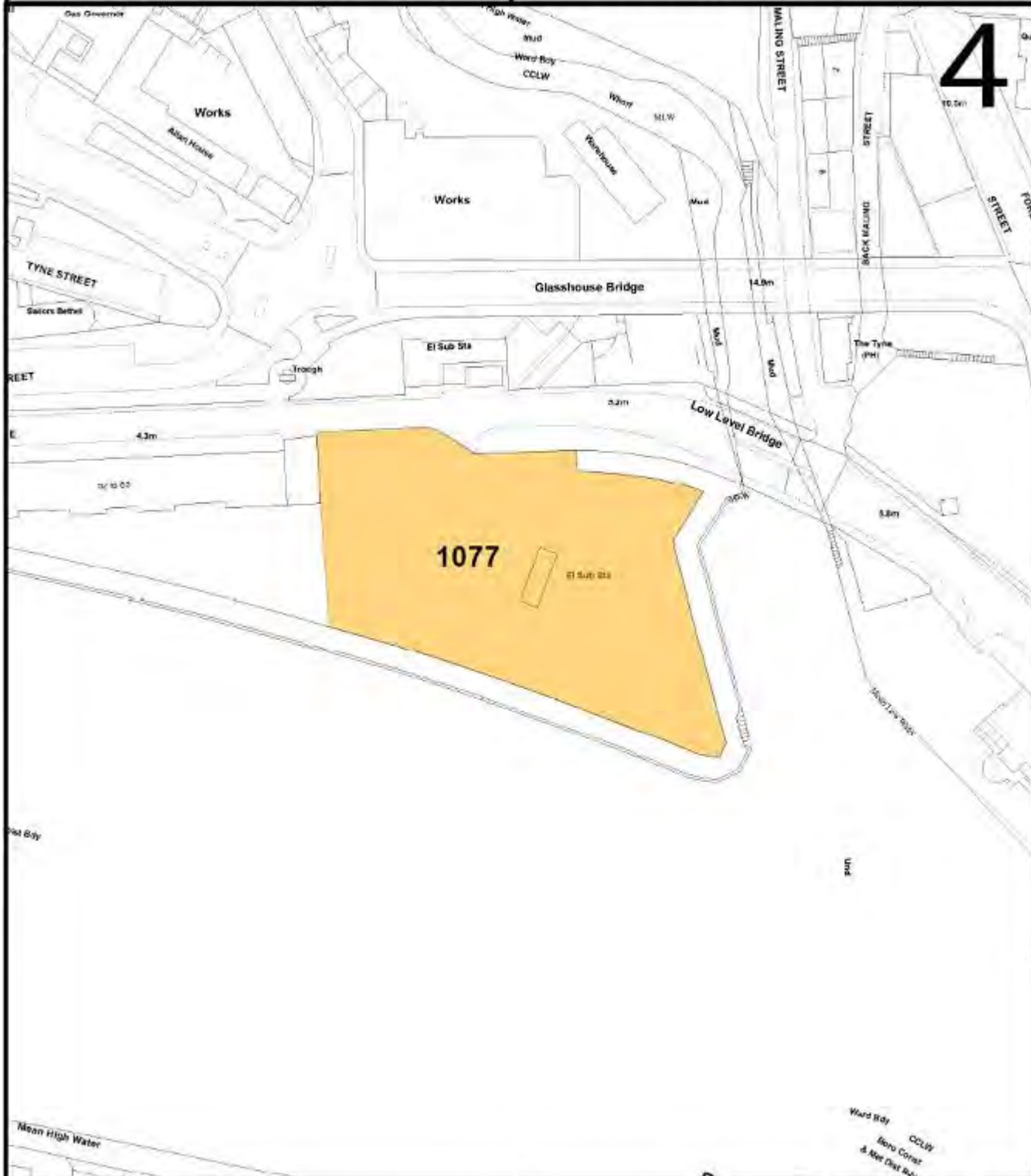
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A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1075: Land West of the Free Trade, St Lawrence Road			
Area (hectares)	0.22ha		Comments	
Current Use	Office	Industrial	Mixed	Vacant site, site lies above the mouth of the River Ouseburn. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant land. Site is in the Ouseburn Design Competition for housing. The site has been submitted for inclusion within the SHLAA. (2)
	√	√	√	
Internal Environment	Good	Average	Poor	Steep gradient from north to east and retaining walls to the south boundary. (3)
		√		
External Environment	Good	Average	Poor	Residential / Public House to the east. (3)
		√		
Road Access	Good	Average	Poor	Via St Lawrence Road. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink and City Road bus links. (4)
	√			
Market Attractiveness	Good	Average	Poor	Site flagged as relocation site for Jesmond YHA. Possible B1 but limited in scope. (2)
			√	
Overall Assessment	Good	Average	Poor	Competing land uses mean the site may come forward for residential or employment uses. The site is also too small for inclusion within the Employment Land Review. (2)
			√	

TOTAL SCORE	25
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(Scoring: 5 = best, 1 = worst)



Address : Malmo Quay	Area (Ha) : 0.50	Map : NZ 2664 SW
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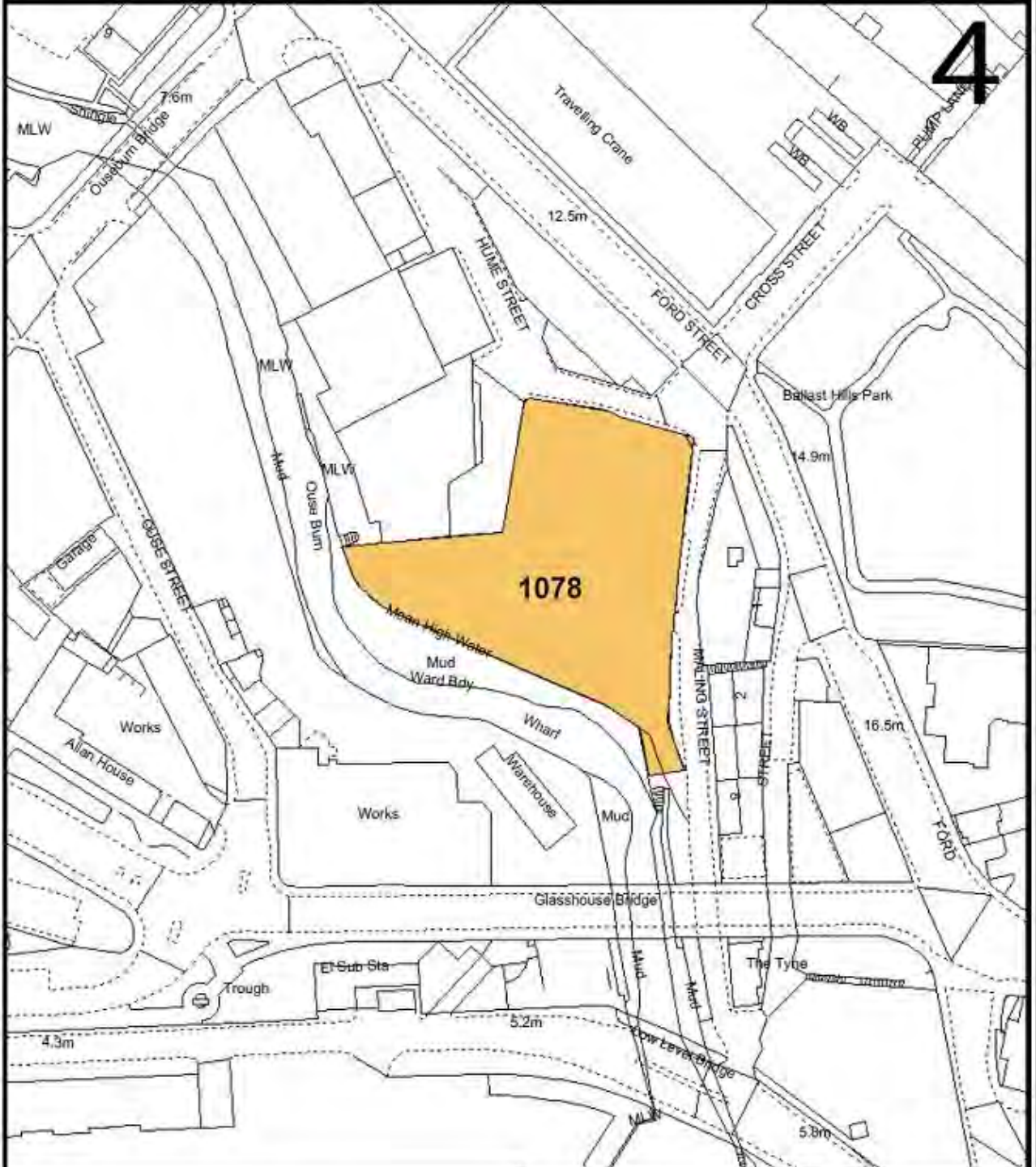
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1077: Malmö Quay			
Area (hectares)	0.5ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant, cleared site at the mouth of the Ouseburn and confluence of the River Tyne. (4)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Existing permission for mixed use scheme including B1 use. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' to come forward for residential and commercial floorspace. 960 sq.m. of B1 floorspace is proposed. (4)
	√			
Internal Environment	Good	Average	Poor	Ground condition / structural issues. (2)
			√	
External Environment	Good	Average	Poor	Principally commercial. Malmö Quay is one of 5 priorities being brought forward by 1NG under Phase 1 of the 'Ouseburn and East Quayside Development Framework'. (4)
		√		
Road Access	Good	Average	Poor	City Road / Glasshouse Street. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink bus service. (4)
	√			
Market Attractiveness	Good	Average	Poor	High demand anticipated as part of wider regeneration of the area. (4)
	√			
Overall Assessment	Good	Average	Poor	Likely to come forward for housing. The site has been identified in the SHLAA.
		√		

TOTAL SCORE	29
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : **Former Ice Factory**
Maling Street

Area (Ha) : 0.37

Map : NZ 2664 SW

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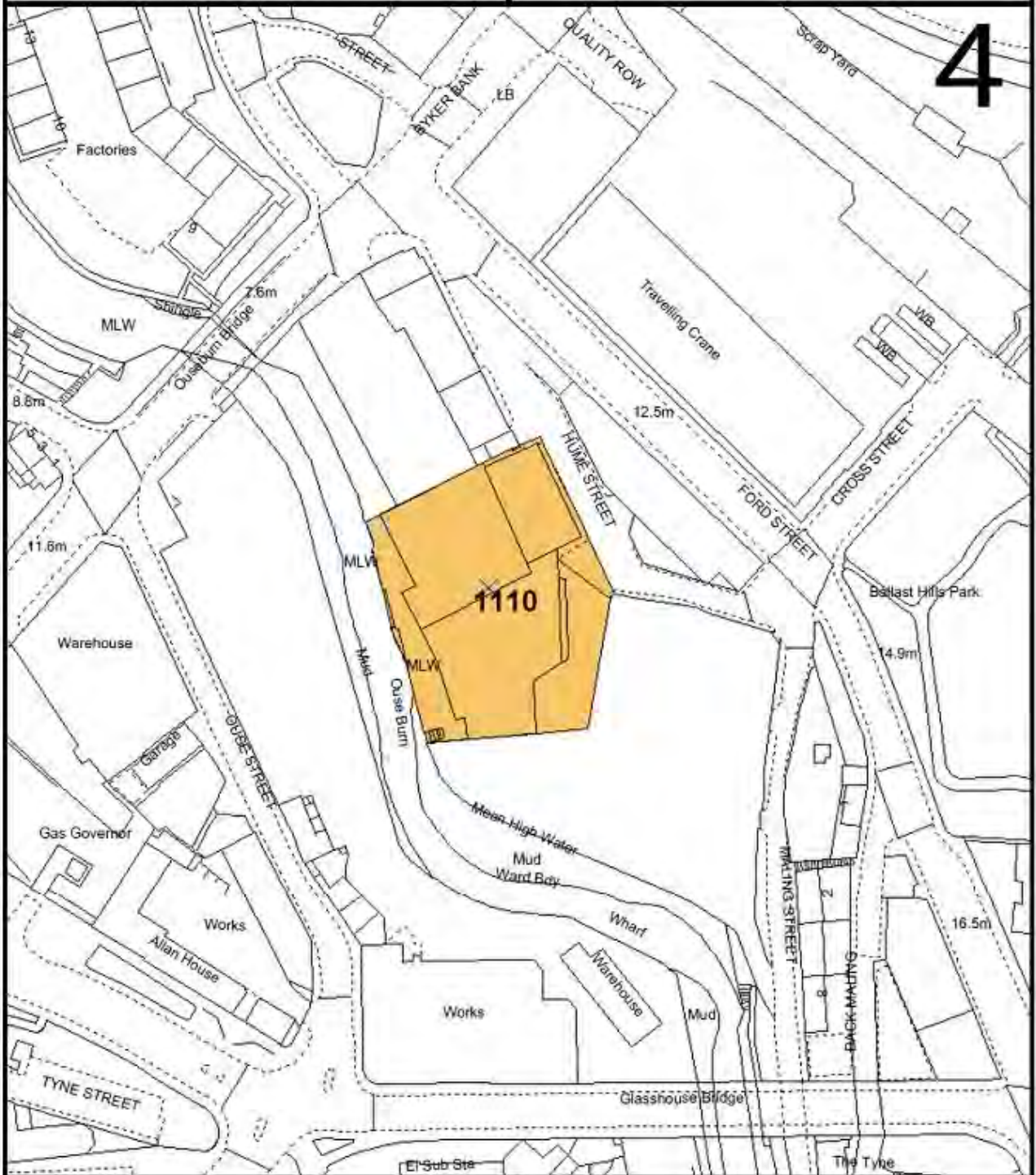
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1078: Former Ice Factory (East Bank), Maling Street		
Area (hectares)	0.37ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√		
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
			√
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
	√		
Commercial timber storage, depot and office space. (3)			
White land within Lower Ouseburn Conservation Area. (3)			
Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' as the 'East Bank' to come forward for residential and commercial uses. The former Ice Factory located on Quay Timber will be a perimeter block providing floorspace for live-work units. (4)			
Potential ground contamination. Improvements required to Quay Wall. (2)			
Predominantly B2/B8. (3)			
Via Ford Street. (3)			
Quaylink bus service. (4)			
High demand anticipated as part of wider regeneration of the area. (4)			
East Bank is one of three national public sector sites to be brought forward under the Public Sector Surplus Land initiative. The site is discounted as 1NG have indicated that the site will come forward for 'live-work' units. (5)			

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : Land west of Hume Street

Area (Ha) : 0.31

Map : NZ 2664 SW

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Date of
Publication: 19/05/2009

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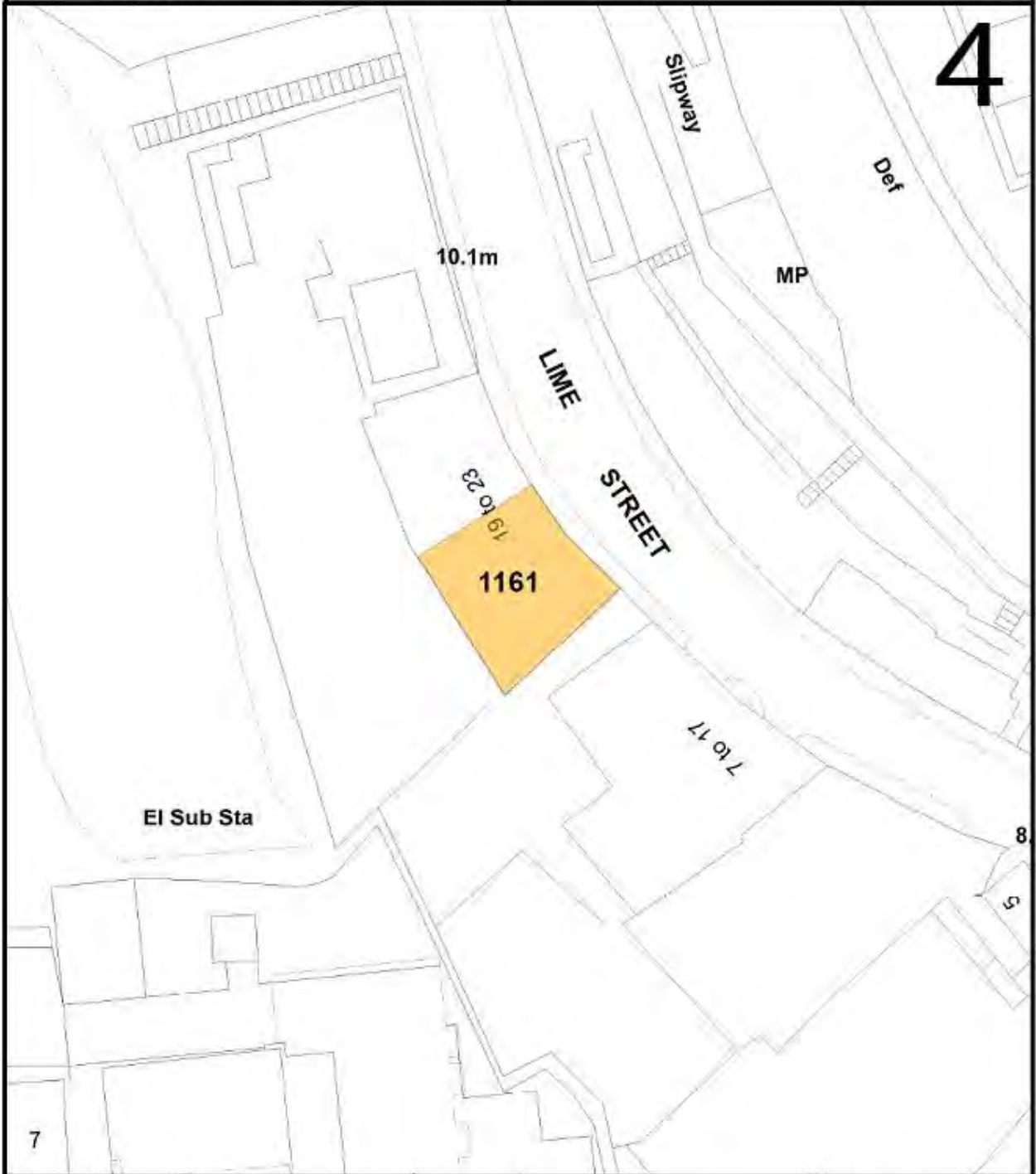
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1110: Heaney's (East Bank), Land west of Hume Street		
Area (hectares)	0.31		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√		
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
			√
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
	√		
<p>Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' as the 'East Bank' to come forward for residential and commercial uses. The Heaney site will be bought forward in the short term. (4)</p> <p>Potential ground contamination. Boundary abuts 1078. (2)</p> <p>Vacant, former commercial land. (3)</p> <p>Via Hume Street. (3)</p> <p>Quaylink bus service. (4)</p> <p>High demand anticipated as part of wider regeneration of the area. (4)</p> <p>East Bank is one of three national public sector sites to be brought forward under the Public Sector Surplus Land initiative. The site has been discounted as 1NG have indicated that the site will not come forward for commercial use. (5)</p>			

TOTAL SCORE	31
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(Scoring: 5 = best, 1 = worst)



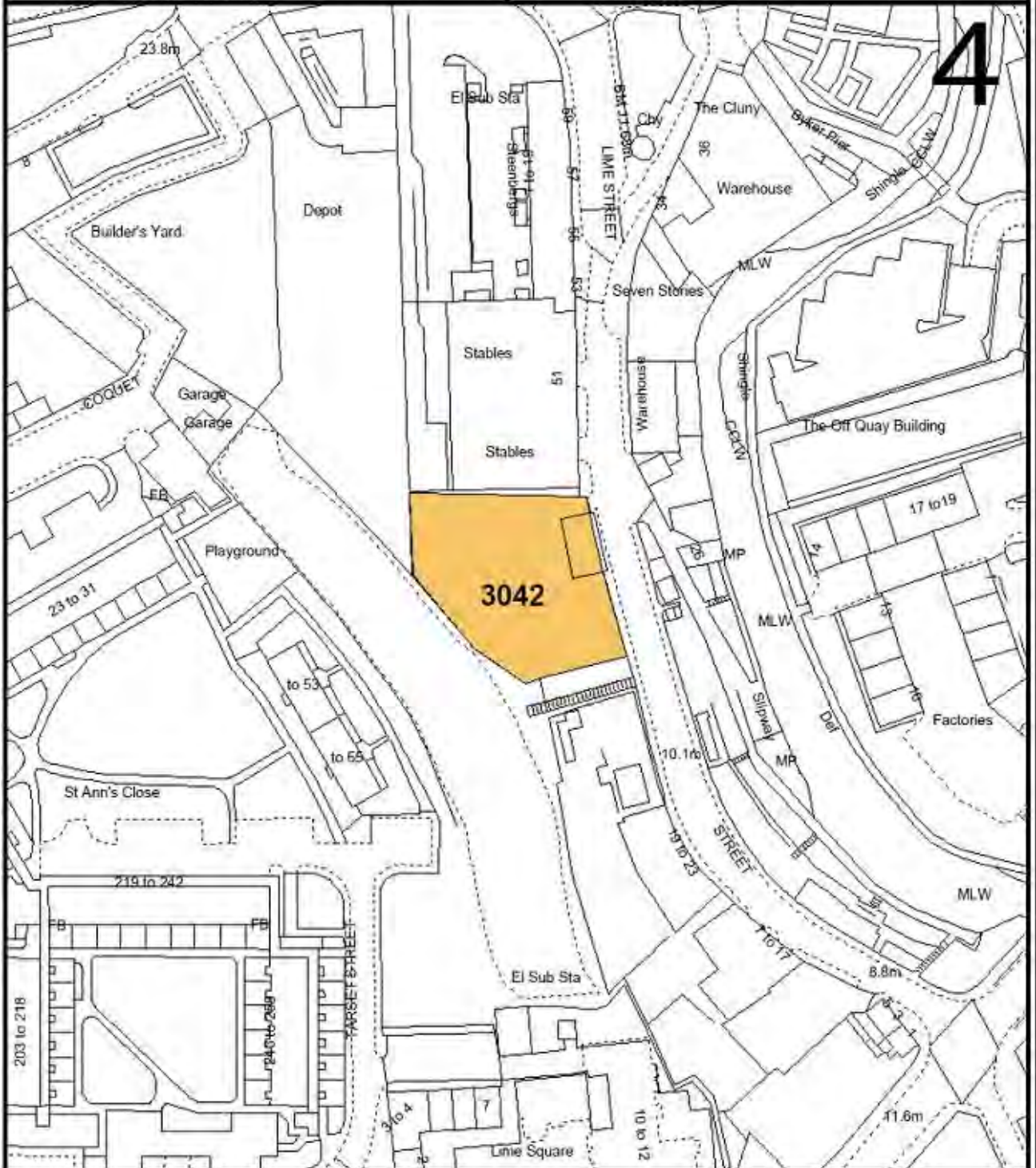
Address : Garage Lime Street	Area (Ha) : 0.02	Map : NZ 2664 SW
Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998		
Scale : 1:500 @ A4	Date of Publication: 19/03/2010	© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009. Drawn By: J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1161 Garage, Lime Street		
Area (hectares)	0.20ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
			√

TOTAL SCORE	24
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : 47 - 49 Lime Street
Byker

Area (Ha) : 0.18

Map : NZ 2664 SW

Harvey Emms, B. A (Hons), M.R.T.P.I.,
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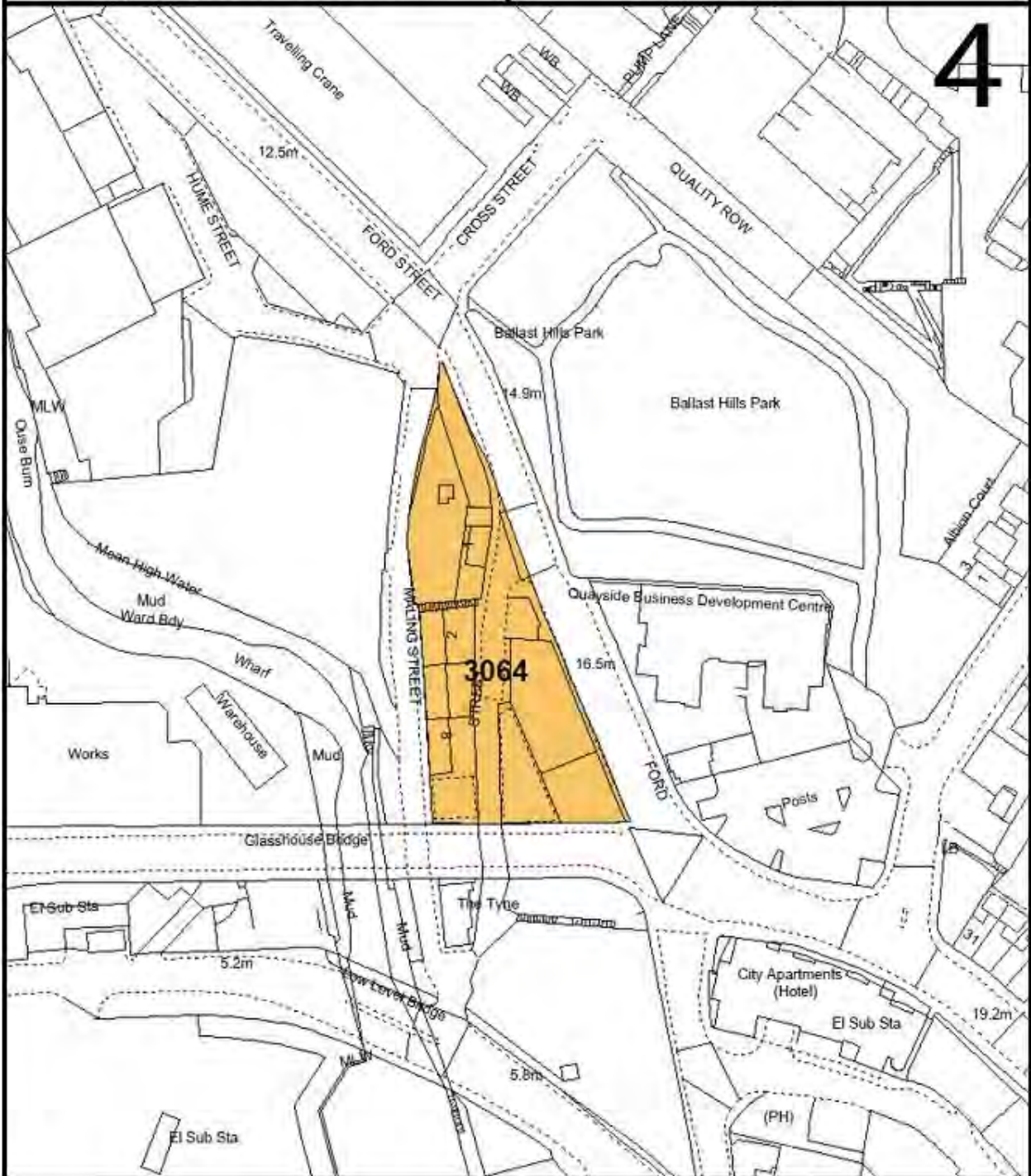
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3042: 47-49 Lime Street			
Area (hectares)	0.18ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	White land. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant land and buildings, subject of renovation by Ouseburn Trust. (3)
			√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Subject to the Ouseburn Trust. (2)
	√			
Internal Environment	Good	Average	Poor	Building with vacant land behind. Possible ground contamination. (2)
		√		
External Environment	Good	Average	Poor	B1/B2 – vacant land. (3)
		√		
Road Access	Good	Average	Poor	Lime Street only. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink bus services and City Road bus services. (5)
	√			
Market Attractiveness	Good	Average	Poor	Landowner unlikely to bring the site forward for redevelopment under current market conditions. (2)
		√		
Overall Assessment	Good	Average	Poor	The likelihood is that the site will be refurbished rather than redeveloped and the future use may not be employment. In addition the site is too small for inclusion in the Employment land Review. (1)
		√		

TOTAL SCORE	25
--------------------	----

(Scoring: 5 = best, 1 = worst)

4



Address : Land at Maling Street

Area (Ha) : 0.30

Map : NZ 2664 SW

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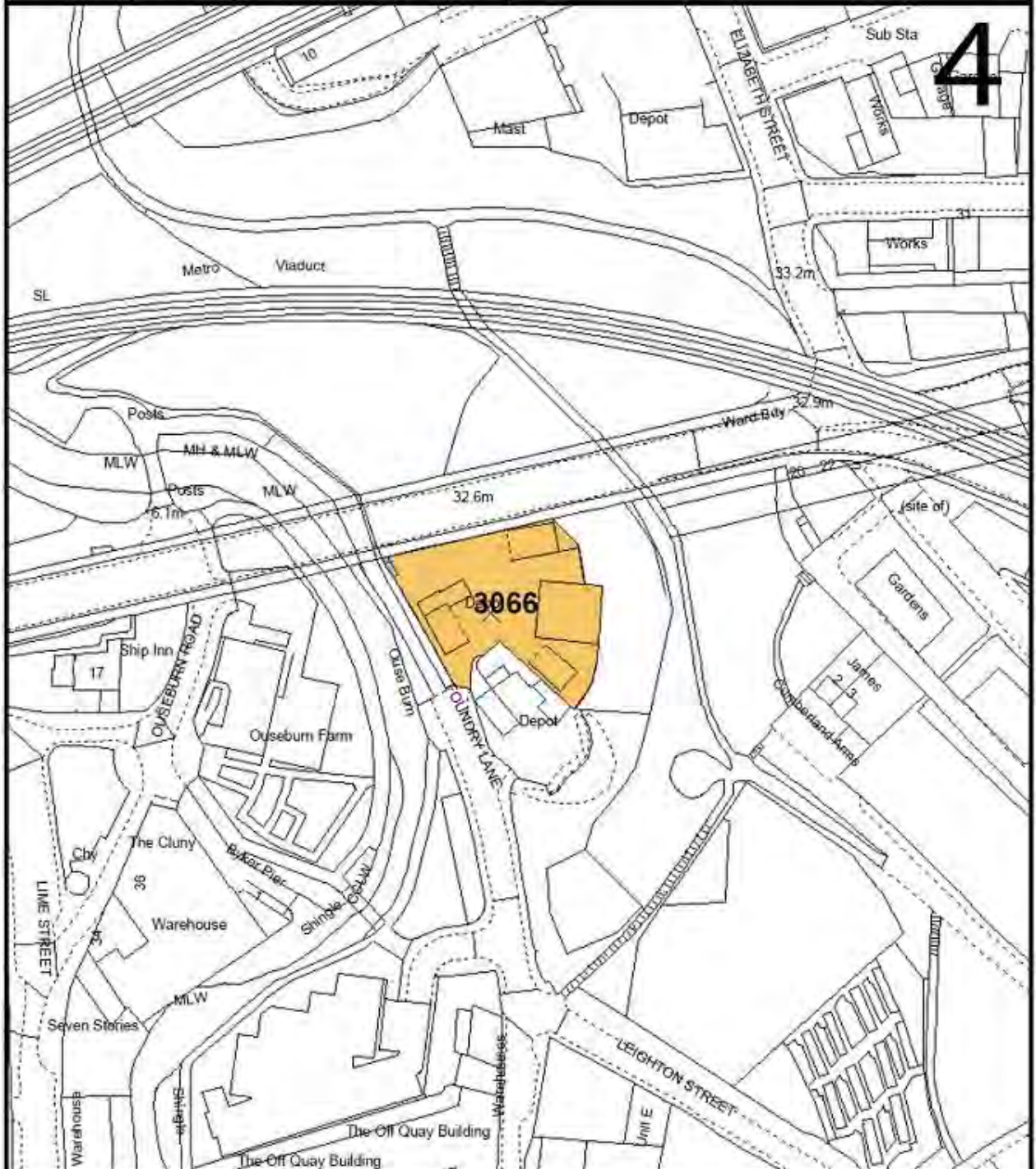
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3064: Maling Street			
Area (hectares)	0.30ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Fragmented, triangular site with mixed commercial buildings. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Mostly in active use, however Maling Street is identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' to come forward for residential and commercial uses. (2,032 sq.m. of B1). (4)
	√			
Internal Environment	Good	Average	Poor	Public highway dissects site. (2)
		√		
External Environment	Good	Average	Poor	Predominantly B1/B2. (3)
		√		
Road Access	Good	Average	Poor	Via Ford Street. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink bus services and City Road bus services. (5)
	√			
Market Attractiveness	Good	Average	Poor	High demand anticipated as part of wider regeneration of the area. (4)
	√			
Overall Assessment	Good	Average	Poor	Likely to come forward for commercial and leisure uses as part of the wider regeneration of the Ouseburn and East Quayside. (3)
		√		

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Stephen Easten
Foundry Lane**

Area (Ha) : **0.14**

Map : **NZ 2664 NW**

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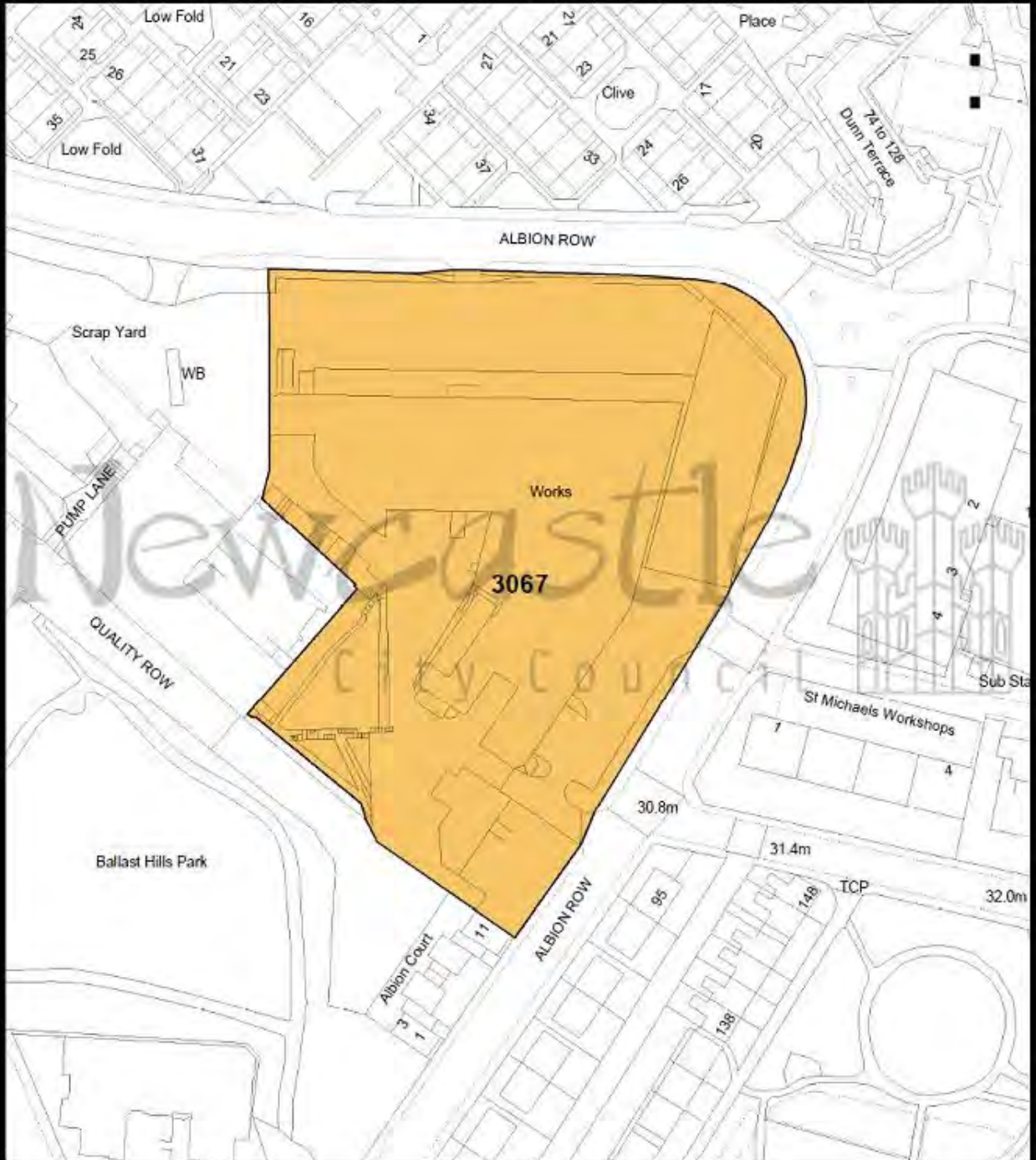
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3066: Stephen Easten/Kelly Plant		
Area (hectares)	0.14ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
			√
Vacant former builders depot and offices. (3) White land. (3) Vacant site. Proposed residential scheme by Byker Bridge (RSL) for the erection of 42 flats in 1 x 3 storey block and a 1 x 5 storey block with roof garden and associated access.(3) Overhead road and rail viaducts. Possible ground contamination. Flood zone, Hadrian's Wall (WHS). (2) Vacant land to the south, open space to north and east. (3) Via Foundry Lane. (3) Quaylink and City Road bus links. (4) Site may not come forward for employment uses and is unlikely to come forward in the short term due to current market conditions. (2) The regeneration of the Ouseburn is a long term prospect for the city and specific land use proposals should be flexible and respond to the market. The site is unlikely to come forward for employment use and is too small for inclusion in the Employment Land Review (2)			

TOTAL SCORE	29
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(Scoring: 5 = best, 1 = worst)



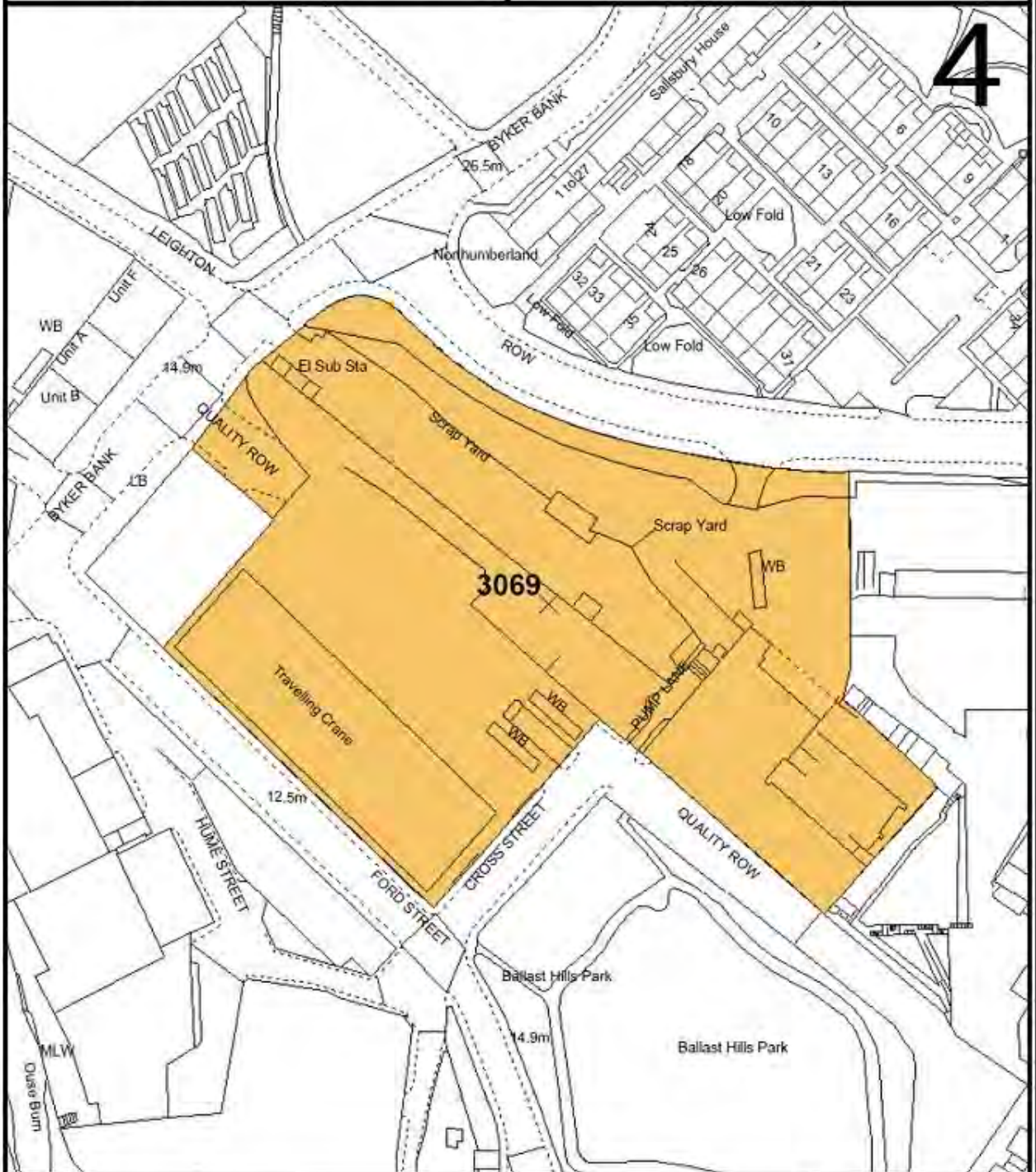
Address : Morleys Albion Row		Area (ha) : 1.42	Map : NZ 2664 SE
Harvey Emms, B A (Hons), M.R.T.P.I, Head of Planning & Transportation Newcastle City Council, Civic Centre, Newcastle upon Tyne NE1 8PH		Tel: 0191 232 8520 Fax: 0191 211 4998	
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3067: Morleys, Albion Row		
Area (hectares)	1.42ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
			√
Internal Environment	Good	Average	Poor
			√
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
			√
Industrial / warehousing site. Used for vehicle hire, repair and storage by Morley's B2 and B1(c). (3)			
White land, in commercial area. Part of Ouseburn Masterplan Area. (3)			
In use, however northern portion of site is underused. (3)			
Steep north to south slope, several level changes, land also drops from east to west. Heavy contamination anticipated. (2)			
West – scrap metal processing, residential / mixed use to north, south and east. (2)			
Via Albion Row. (3)			
Quaylink and City Road bus services. (4)			
Unlikely to come forward in the short / medium term due to availability and market conditions. (2)			
The likelihood is that the site will come forward for residential development. Heavy investment required to de-risk the site. (2)			

TOTAL SCORE	24
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **GD Metal Recycling**
Quality Row

Area (Ha) : **1.57**

Map : **NZ 2664 SW**
NZ 2664 SE

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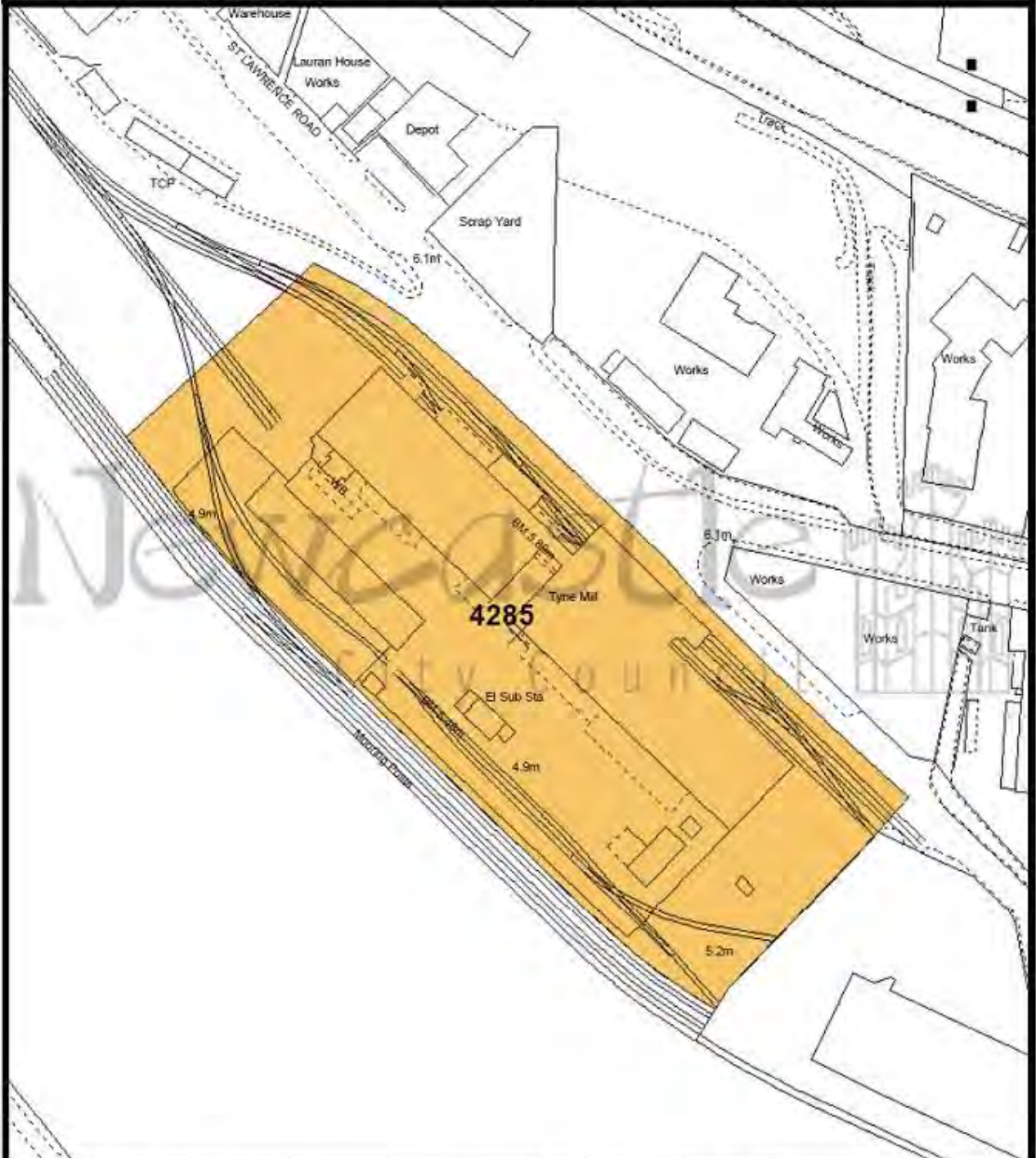
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3069: GD Metal Recycling, Quality Row		
Area (hectares)	1.57ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	√
Internal Environment	Good	Average	Poor
			√
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
			√
In use, mainly for metal recycling. Mainly B2, B1 uses. (3)			
White land. (3)			
Operational, however north east area of site is vacant. (2)			
Retaining wall runs from east to west through site. Heavily contaminated. (2)			
Residential to the north, remainder is commercial. (3)			
Ford Street and/or Byker Bank. (3)			
Quaylink or City Road bus links. (4)			
Unlikely to come forward in the short / medium term due to availability and market conditions. (3)			
Site fully operational for B2 and B1(c). Heavy investment required to de-risk the site. May come forward in the longer term for residential development. (3)			

TOTAL SCORE	26
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Spillers Mill
Quayside

Area (ha) : 1.98

Map : NZ 2663 NE
NZ 2763 NW

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Scale : 1:1,500

Date : 15/06/2006

Drawn by : AM

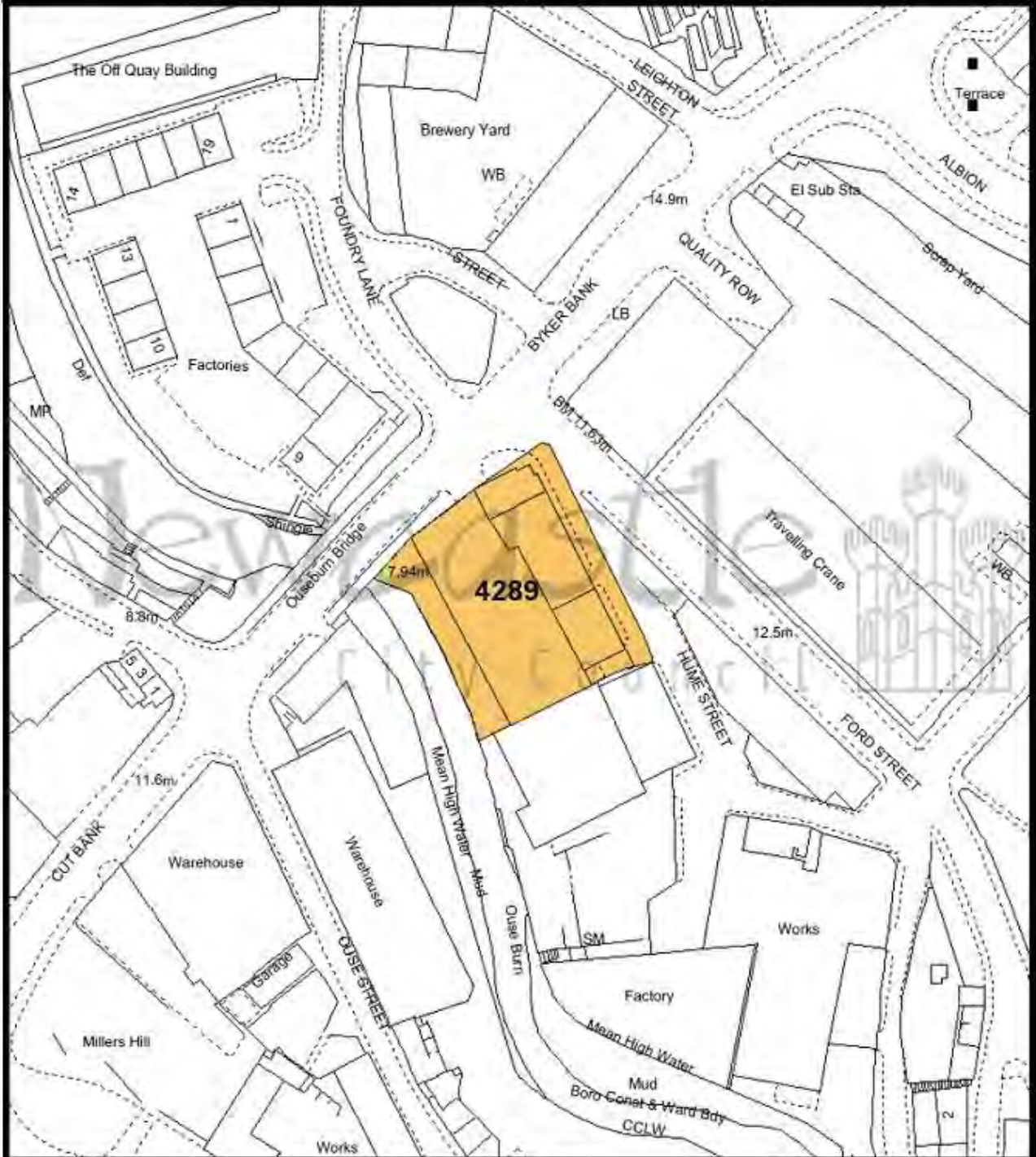
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4285: Spillers Mill			
Area (hectares)	1.98ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant land. (3)
	N/A	√	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Unallocated within UDP. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	The regeneration of Spillers Quay and Spillers Mill is a long prospect for the city. The 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' suggests the mill may provide a community / leisure use of national significance to compliment the existing offer on the south bank to come forward for leisure and community uses. (4)
	√	√		
Internal Environment	Good	Average	Poor	Vacant land, flood risk. (2)
		√		
External Environment	Good	Average	Poor	Principally commercial. Spillers Quay is one of 5 priorities being brought forward by 1NG under Phase 1 of the 'Ouseburn and East Quayside Development Framework'. (4)
		√		
Road Access	Good	Average	Poor	St Lawrence Road & Quayside. (3)
		√		
Public Transport	Good	Average	Poor	Quaylink bus service. (5)
	√			
Market Attractiveness	Good	Average	Poor	High demand anticipated as part of wider regeneration of the area. (4)
	√			
Overall Assessment	Good	Average	Poor	1NG have indicated the site will come forward for community / leisure facilities. (5)
	√			

TOTAL SCORE	32
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Quay Timber Site
Hume Street

Area (ha) : 0.25

Map : NZ 2664 SW

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Scale : 1:1,250

Date : 20/06/2006

Drawn by : AM


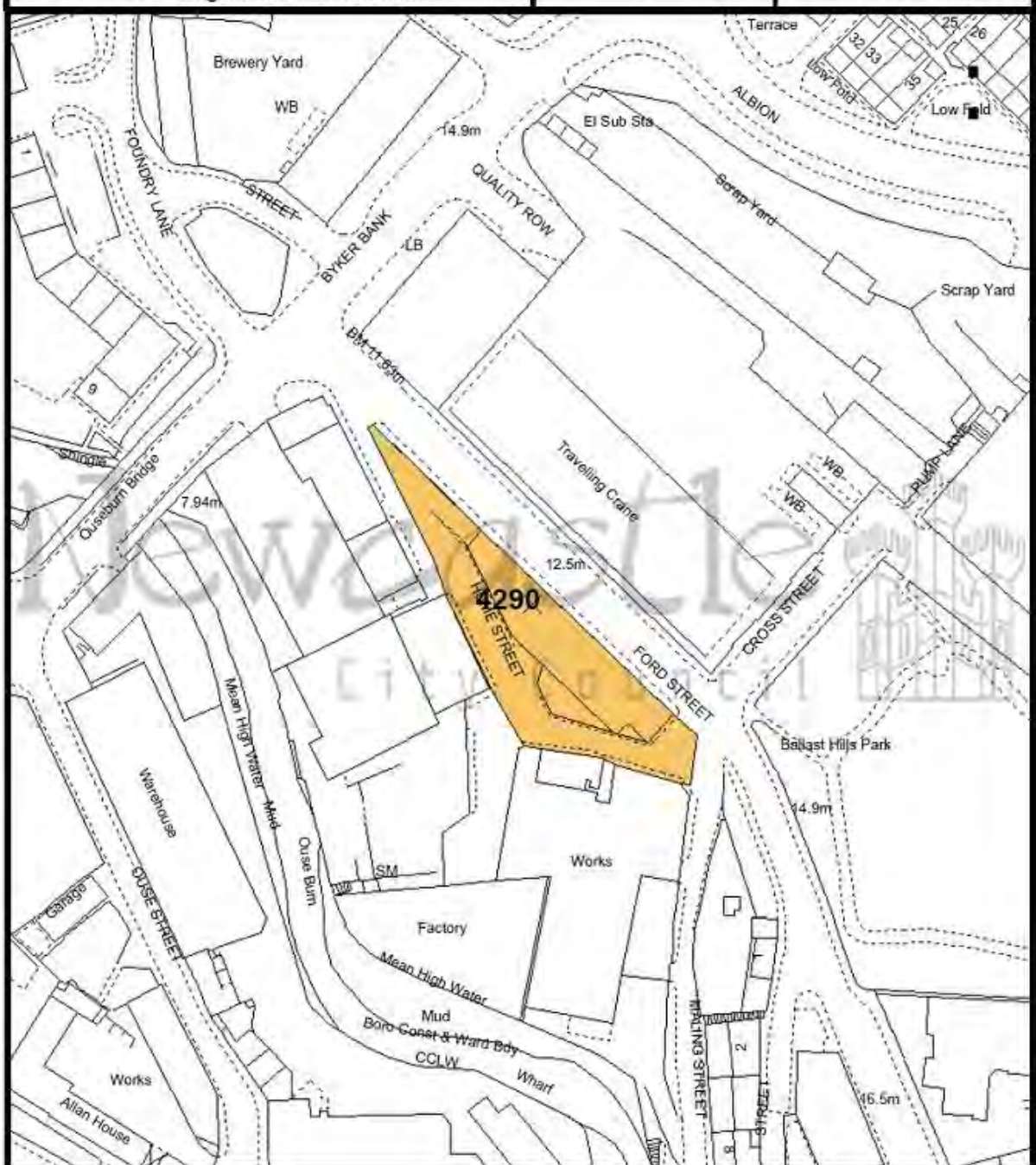
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4289: Quay Timber (East Bank), Hume Street		
Area (hectares)	0.24		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
			√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
			√
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
	√		
1NG have indicated this site will come forward for 'Live Work' units and as such is not available for employment use. In addition the site is below the threshold for inclusion within the Employment Land Review. (5)			

TOTAL SCORE	32
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(Scoring: 5 = best, 1 = worst)

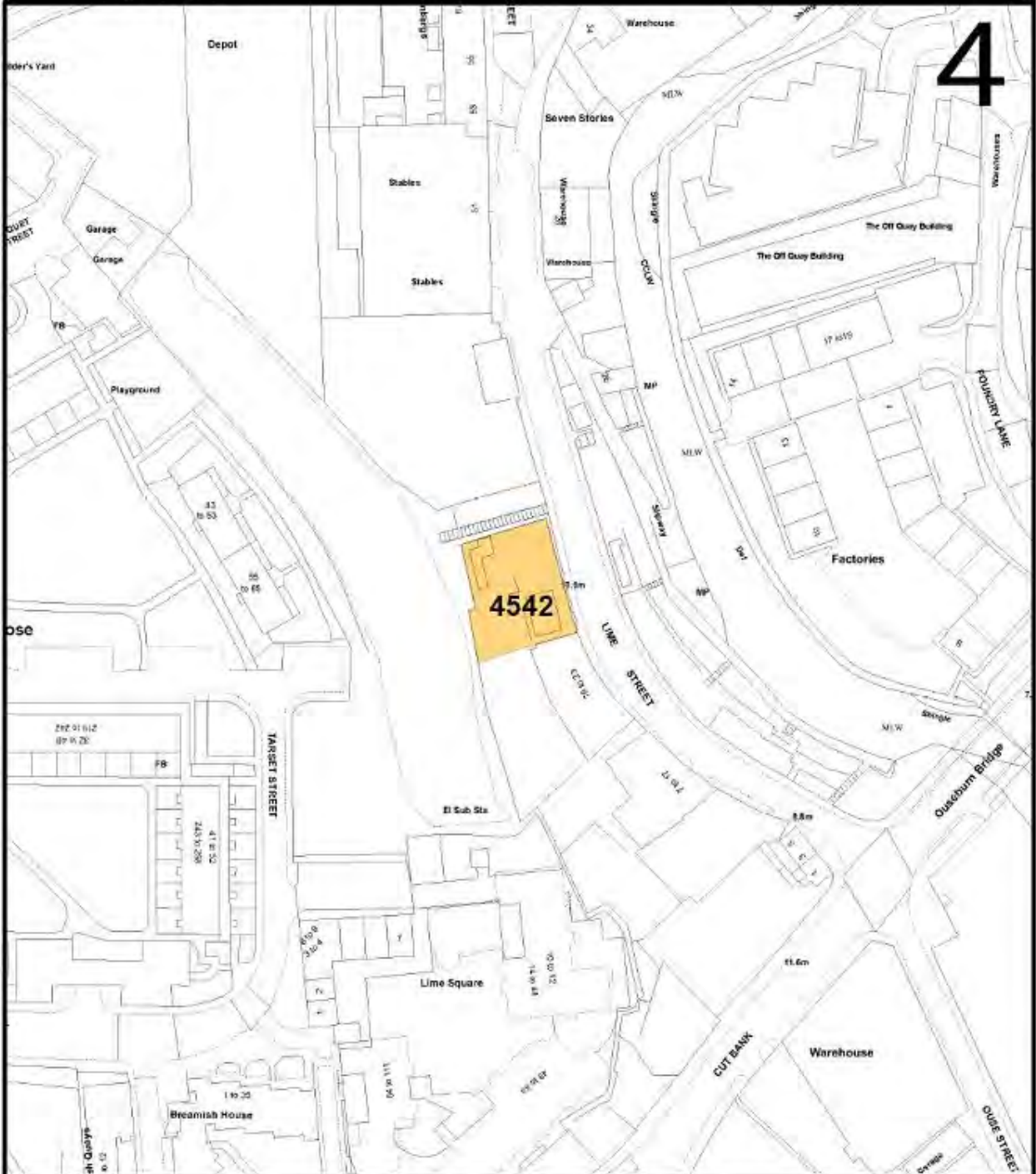
	Strategic Planning & Transportation Regeneration Directorate	Land Resource System	Site No : 4290
			
Address : Ince Building Hume Street		Area (ha) : 0.19	Map : NZ 2664 SW
Harvey Emms, B. A (Hons), M.R.T.P.I, Head of Planning & Transportation Newcastle City Council, Civic Centre, Newcastle upon Tyne NE1 8PH		Tel: 0191 232 8520 Fax: 0191 211 4998	
Scale : 1:1,250	Date : 20/06/2006	Drawn by : AM	<small>Based on the 2005 Ordnance Survey Map with the permission of the Controller of H. M. S. O. Crown Copyright Reserved LS 100016566, Newcastle City Council</small>

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4290 Ince Building (East Bank), Hume Street		
Area (hectares)	0.19		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
			√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
			√
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		
<p>Operational builders / timber yard. (2)</p> <p>White land within Lower Ouseburn Conservation Area. (2)</p> <p>Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' as the 'East Bank' to come forward for residential and commercial uses. The Ince Building provides a longer term opportunity to develop a commercial or residential offer on site and has previously gained consent for student purpose built accommodation (2008/1311/01/DET). Existing occupiers would need to be decanted. (3)</p> <p>Potential ground contamination. (2)</p> <p>Predominantly B2/B8. (4)</p> <p>Via Ford Street. (3)</p> <p>Quaylink bus service. Public Transport Accessibility Grade A (5)</p> <p>High demand anticipated as part of wider regeneration of the area. (4)</p> <p>East Bank is one of three national public sector sites to be brought forward under the Public Sector Surplus Land initiative. The site may not come forward for commercial use, and is too small for consideration as part of the Employment Land Review. (5)</p>			

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)



<p>Address : Pigeon Cress Lime Street</p>	<p>Area (Ha) : 0.06</p>	<p>Map : NZ 2664 SW</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
<p>Scale : 1:1,250 @ A4</p>	<p>Date of Publication: 19/03/2010</p>	<p>© Crown copyright. All rights reserved. Newcastle City Council, 100019669, 2009. Drawn By: J McLaughlin</p>

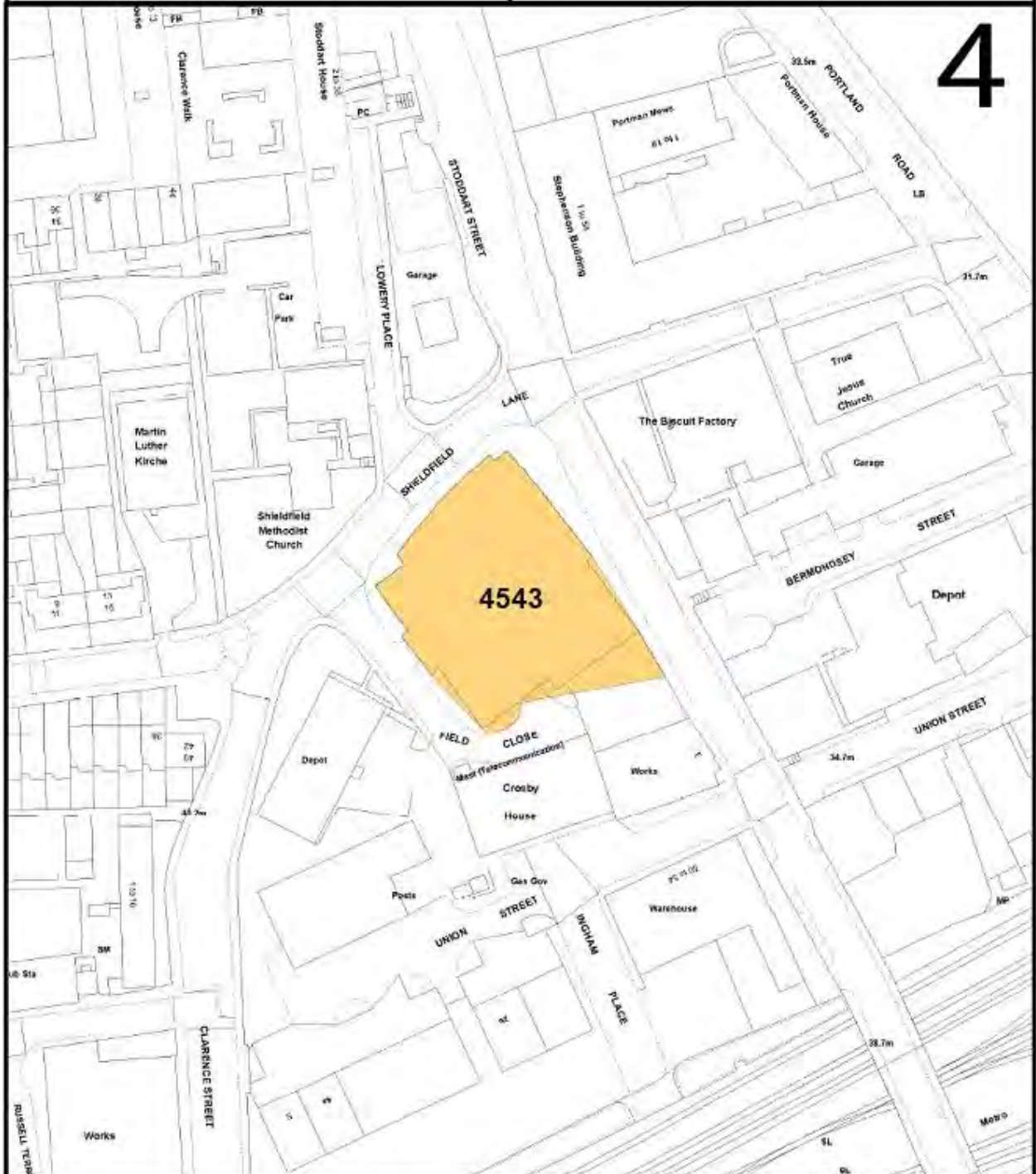
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4542: Lime Street, Pigeon Crees		
Area (hectares)	0.06ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	√
Internal Environment	Good	Average	Poor
			√
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
			√
Site too small to be considered as part of the Employment Land Review. Unlikely to come forward for development in the short to medium term. (1)			

TOTAL SCORE	22
--------------------	-----------

(Scoring: 5 = best, 1 = worst)

4



Address : **Winns Products**
Shieldfield Industrial Estate

Area (Ha) : 0.25

Map : NZ 2564 NE

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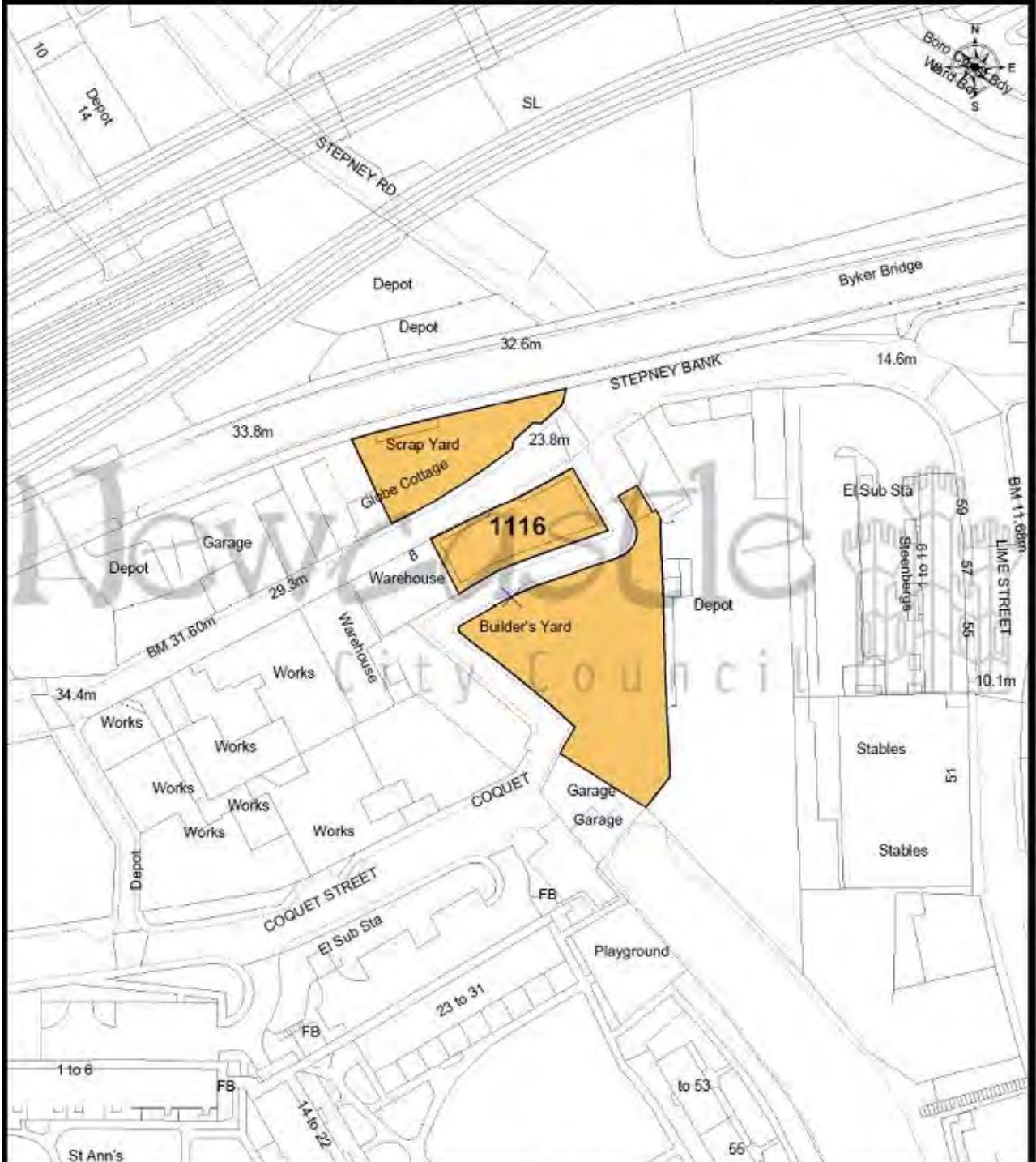
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4543:Winns Products, Shieldfield Industrial Estate		
Area (hectares)	0.25ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√		
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	
Recently cleared former industrial site. (3)			
Part of UDP ED3.1 allocation (30). (3)			
Permission granted for purpose built student accommodation. (2)			
Slope from west to east. (3)			
Student accommodation, B2, church and residential. (3)			
Via Field Close / Clarence Street. (3)			
Highly accessible location. Public Accessibility Grade A. (5)			
Shieldfield Industrial Estate is to be de-allocated. (2)			
Discount, site coming forward as purpose built student accommodation. (2)			

TOTAL SCORE	26
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Upper Steenbergs Yard and
land at Stepney Bank

Area (ha) : 0.31

Map : NZ 2664 NW

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Date : 17/08/2007

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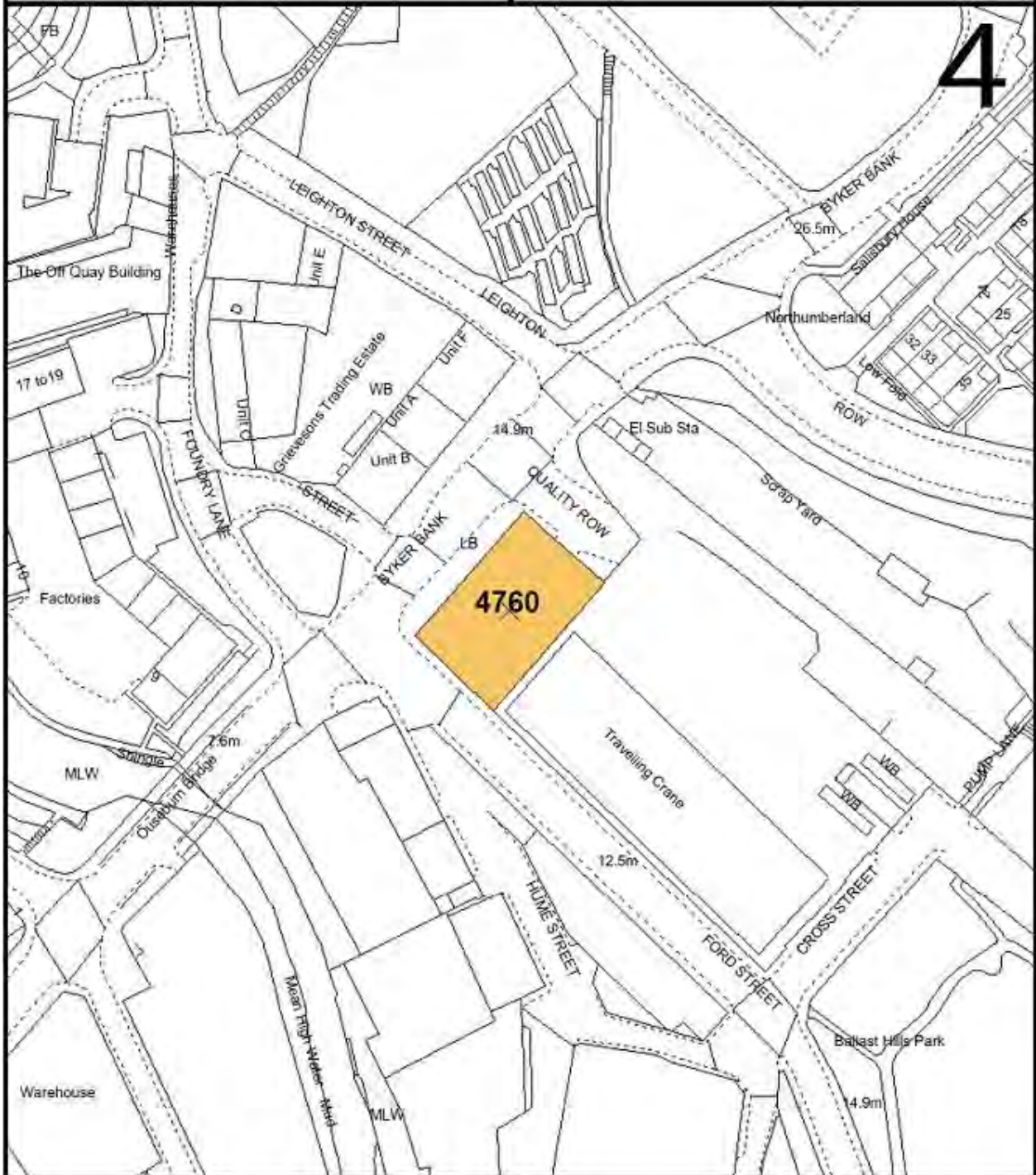
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1116: Upper Steenberg's: (Lower Plateau), Stepney Bank		
Area (hectares)	0.26ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
			√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	√
Overall Assessment	Good	Average	Poor
		√	

TOTAL SCORE	27
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land at junction of Byker Bank
and Ford Street

Area (Ha) : 0.10

Map : NZ 2664 SW

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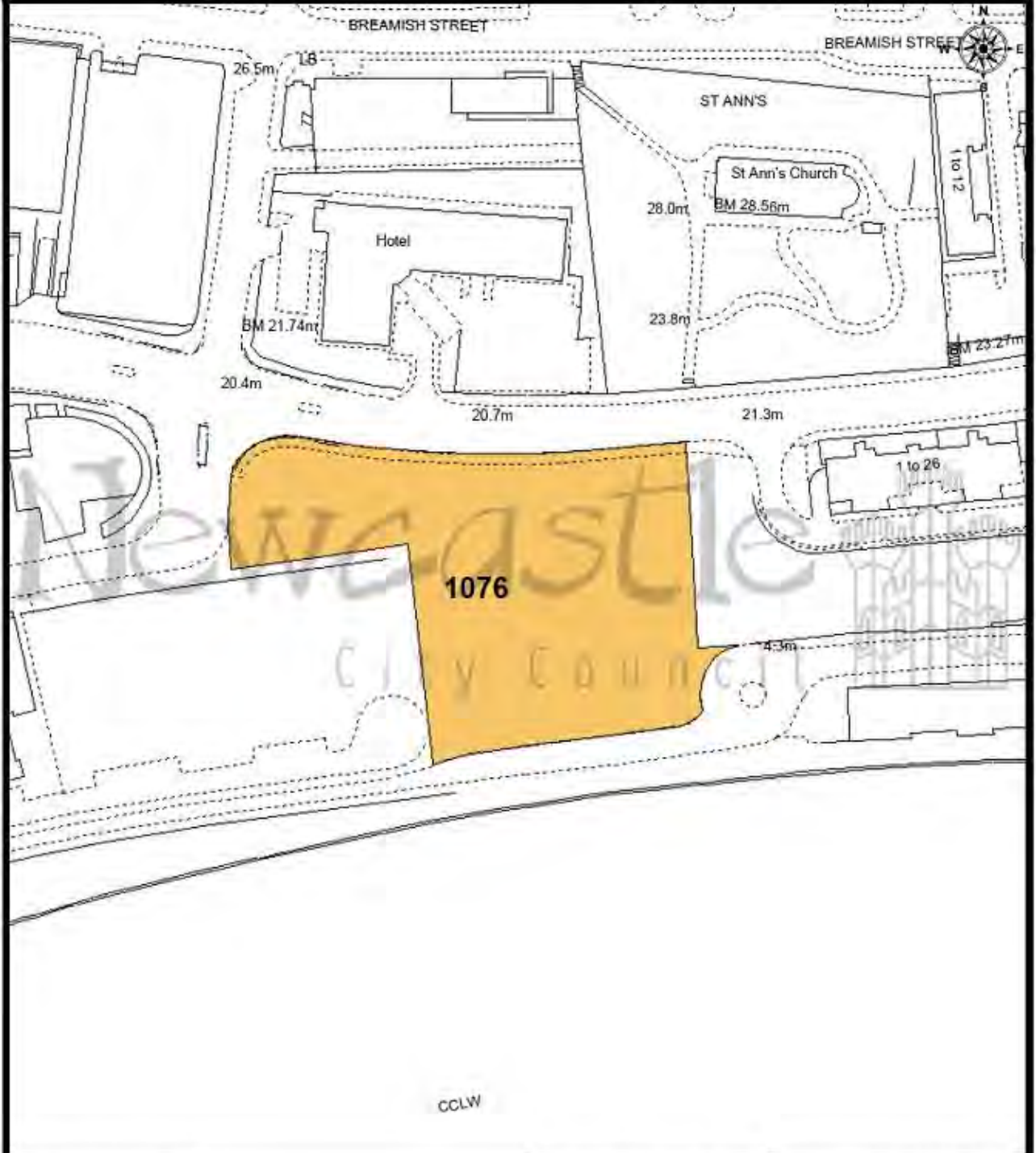
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A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4760: Land at junction of Byker Bank and Ford Street		
Area (hectares)	0.10ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
			√
			Current industrial unit and warehouse part vacant (10,000 sq ft vacant). (3)
			Identified in the Ouseburn Regeneration Masterplan. (3)
			10,000 sq ft vacant. (3)
			Steep sloping site from north to south – Ouseburn Bank. (2)
			Heavy industrial (B2). Scrap metals processing to the north and east. (2)
			Via Ford Street. (3)
			Quaylink and City Road bus links. Public Accessibility Grade A. (5)
			Small site, constrained by bad neighbour uses and ground stability. (2)
			Unlikely to be viable in the short / medium term. Furthermore site is too small for inclusion within the Employment Land Review. (2)

TOTAL SCORE	25
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Plot 12
Quayside

Area (ha) : 0.58

Map : NZ 2564 SE
NZ 2664 SW

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Date : 10/08/2005

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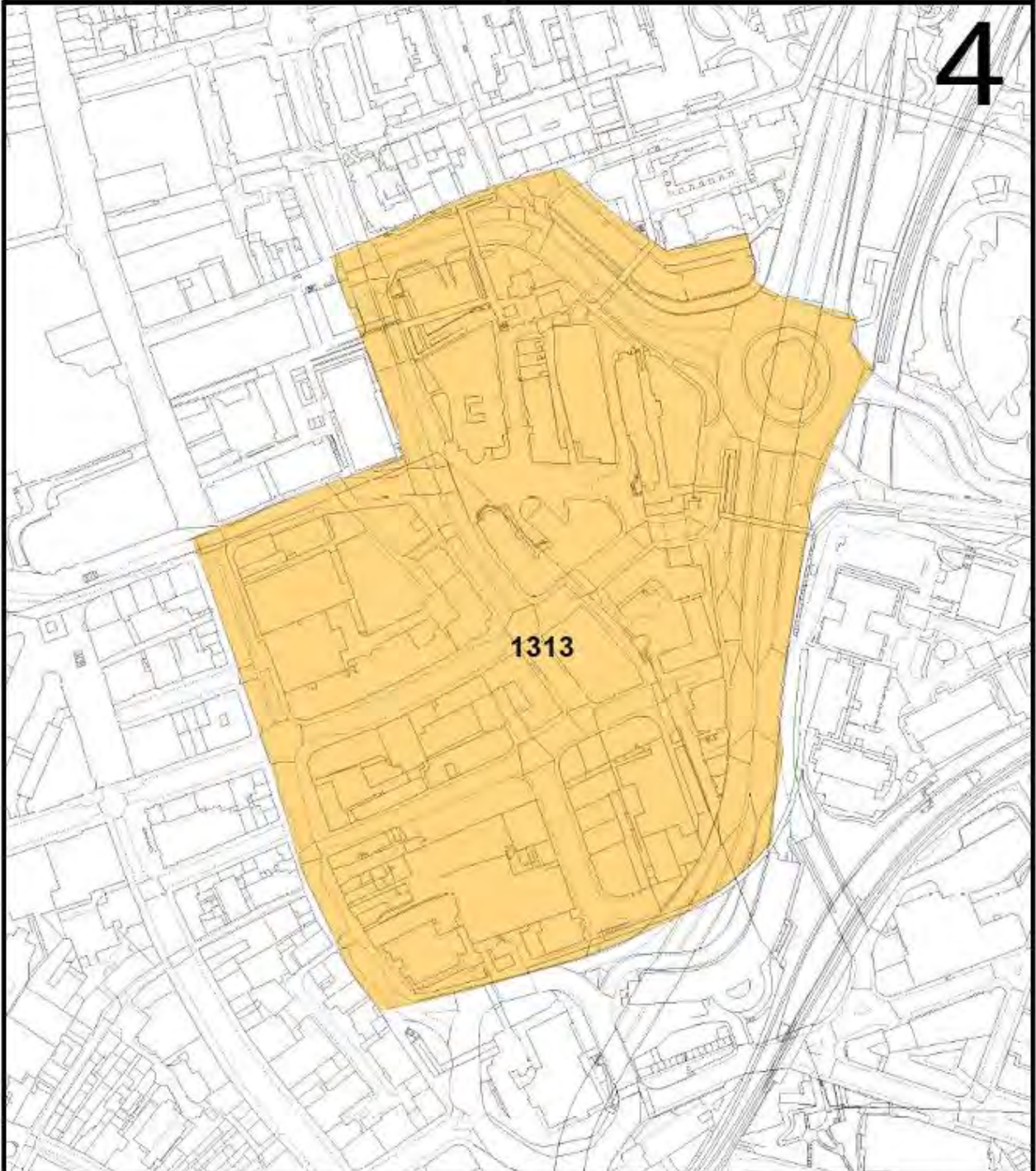
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1076: Plot 12, Quayside			
Area (hectares)	0.57ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Cleared site. Proposed as last remaining commercial site in the East Quayside Masterplan by former Urban Development Corporation. (4)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. Last remaining commercial development plot from East Quayside Masterplan. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	0.58ha cleared undeveloped site. (4)
		√		
Internal Environment	Good	Average	Poor	Oven ready, cleared site. Steep north / south incline. (4)
			√	
External Environment	Good	Average	Poor	Commercial B1 – East Quayside development to the west/north west approx 5-6 storeys. Residential 2-4 storeys to east and north east. (3)
	√			
Road Access	Good	Average	Poor	Via Quayside to south / riverside. (3)
		√		
Public Transport	Good	Average	Poor	Adjacent public transport routes including Quaylink service. Also, northerly pedestrian access from City Road. (4)
	√			
Market Attractiveness	Good	Average	Poor	Unlikely to be viable in the current market. However, when the market recovers demand will be high given location in the urban core and the local success of similar schemes. (4)
	√			
Overall Assessment	Good	Average	Poor	Expired planning permission for commercial led mixed use scheme including multi-storey car park, A3 uses, offices and residential. (4)
	√			

TOTAL SCORE	34
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **East Pilgrim Street
Regeneration Opportunity Area**

Area (Ha) : 17

Map : NZ 2564 NW/SW
NZ 2464 SE

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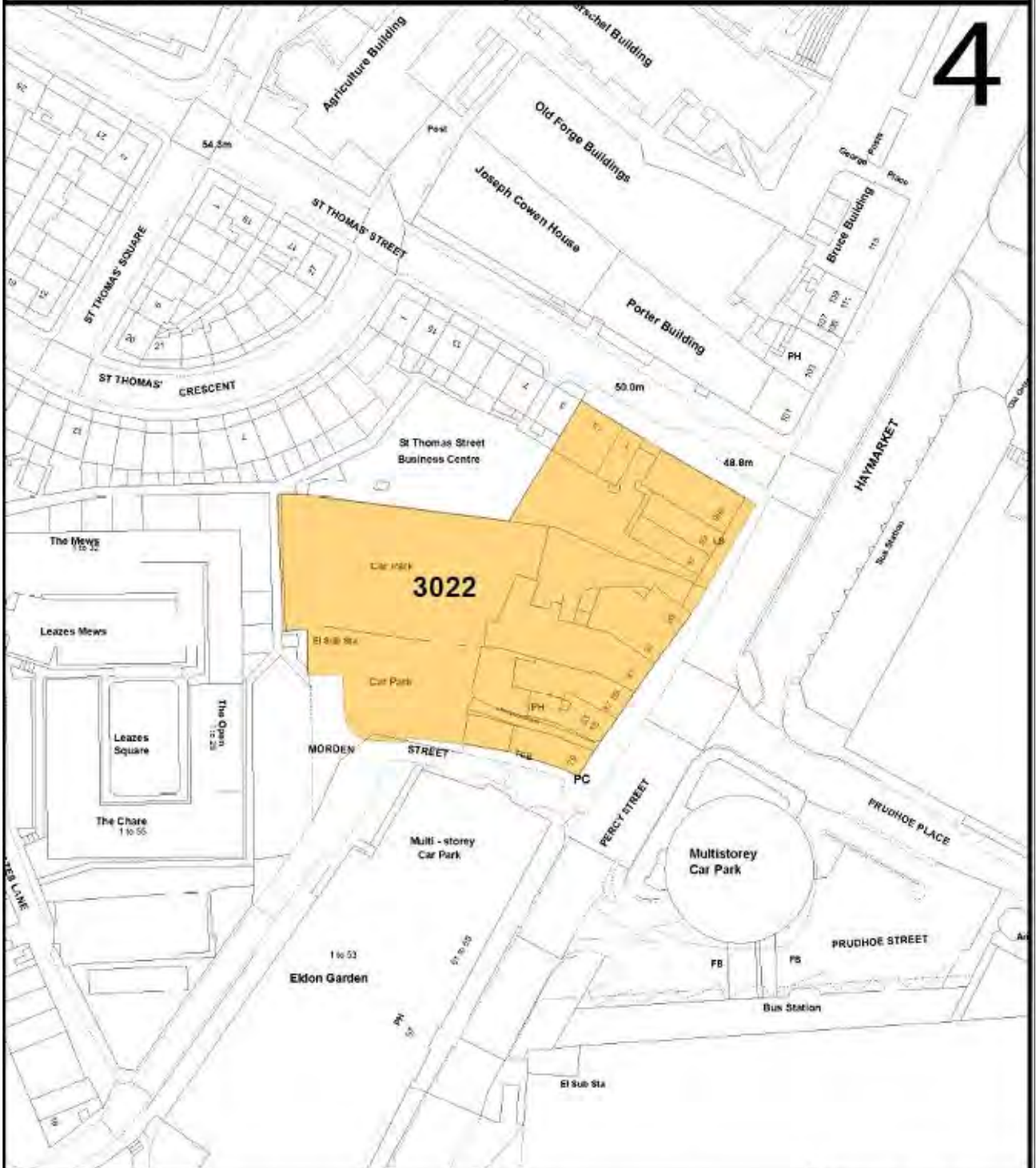
**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1313: East Pilgrim Street (EPS)			
Area (hectares)	17.00ha (3.00ha available for B1)			
Current Use	Office	Industrial	Mixed	Mixed use, with a significant proportion of derelict / vacant / semi vacant properties. (3)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Part of site is the core shopping area. Part of the CCAAP. East Pilgrim Street Interim Planning Guidance to guide development proposals. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Available, subject to market conditions improving. Some land assembly required. (3)
		√		
Internal Environment	Good	Average	Poor	There is a 5 metre change in gradient, sloping from the north to south of the site. Site includes BT Central Telephone Exchange. Asbestos in a number of buildings. (3)
		√		
External Environment	Good	Average	Poor	City Centre uses to the west and east, constrained by Swan House roundabout in the south and central motorway to the east. Noise from Metro / motorway / Swan House roundabout. (3)
		√		
Road Access	Good	Average	Poor	Close proximity to Swan House roundabout and Central Motorway. (5)
	√			
Public Transport	Good	Average	Poor	Public transport accessibility Grade A. (5)
	√			
Market Attractiveness	Good	Average	Poor	Adjacent to historic Grainger Town area and the core shopping area. Although, the site itself contains poor quality open space and poor connectivity to the remainder of the City Centre. (3)
		√		
Overall Assessment	Good	Average	Poor	Potential for retail led mixed use development with an element of office floorspace. Unlikely to come forward until market conditions improve. (4)
		√		

TOTAL SCORE	33
--------------------	-----------

(Scoring: 5 = best, 1 = worst)

4



Address : Percy Street West	Area (Ha) : 0.60	Map : NZ 2464 NE
------------------------------------	-------------------------	-------------------------

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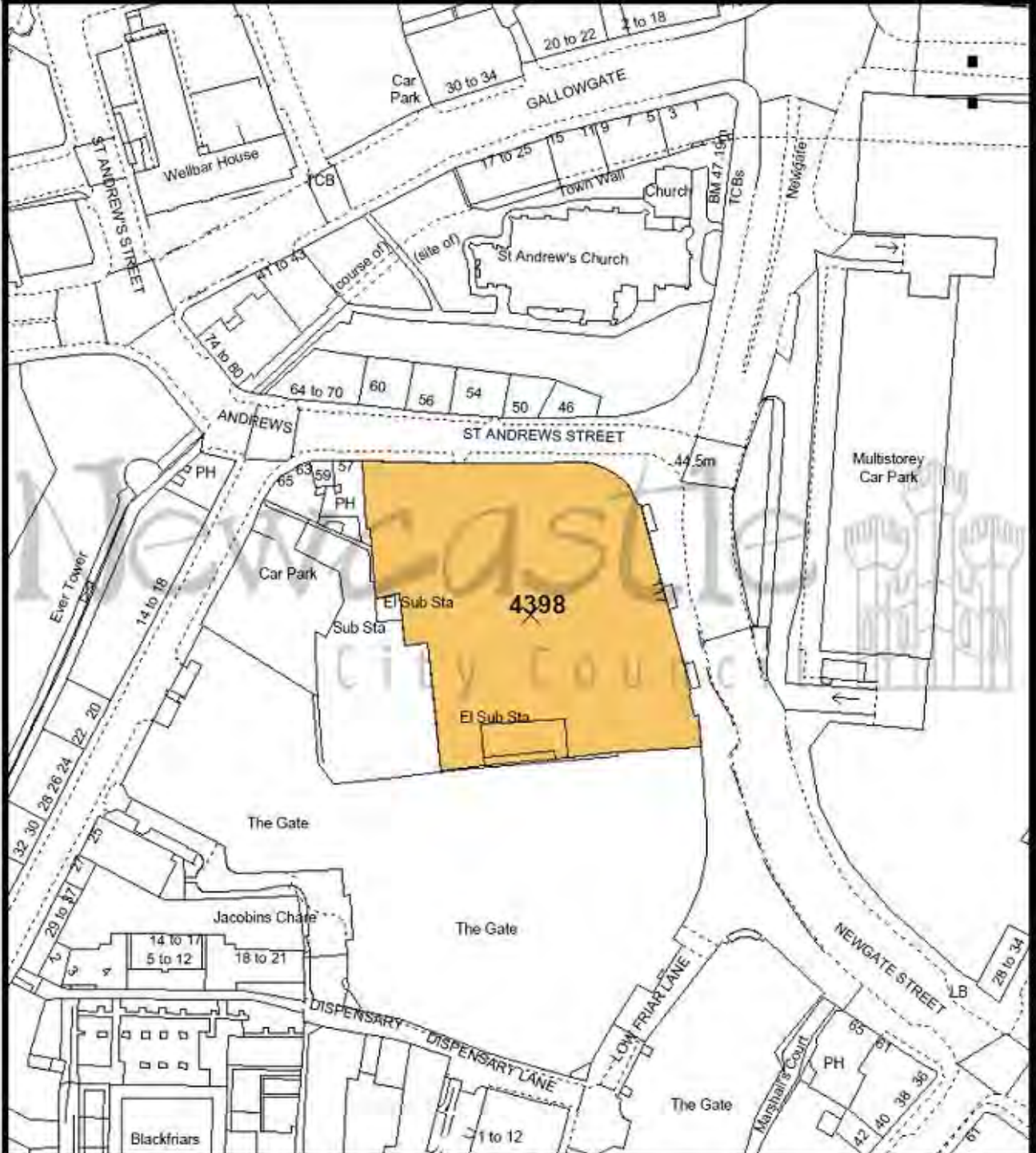
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3022: Percy Street West			
Area (hectares)	0.60ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Existing surface car park and (Percy Street) mix of Public House, 1 – 2 storey shops / commercial units. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Mixed use. Located in the City Centre no sequential test required. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Existing buildings – occupied on ground floors. Some vacancy at upper levels. Existing users require relocation. (3)
	√	√		
Internal Environment	Good	Average	Poor	Slopes from west to east towards Percy Street. (3)
		√		
External Environment	Good	Average	Poor	To the north and west - housing. North / east - education. (3)
		√		
Road Access	Good	Average	Poor	Likely from Morden Street (to the rear of site). (3)
		√		
Public Transport	Good	Average	Poor	City Centre site. Highly accessible to public transport. (5)
	√			
Market Attractiveness	Good	Average	Poor	Likely to be viable as a mixed use scheme. Not an obvious site. (2)
		√		
Overall Assessment	Good	Average	Poor	Likelihood is that the site will come forward for retail at ground floor level with residential above. (2)
			√	

TOTAL SCORE	24
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : North Eastern Co-op
117 Newgate Street

Area (ha) : 0.45

Map : NZ 2464 SE
NZ 2464 SW

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Tel: 0191 232 8520
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Scale : 1:1,250

Date : 13/03/2007

Drawn by : AM

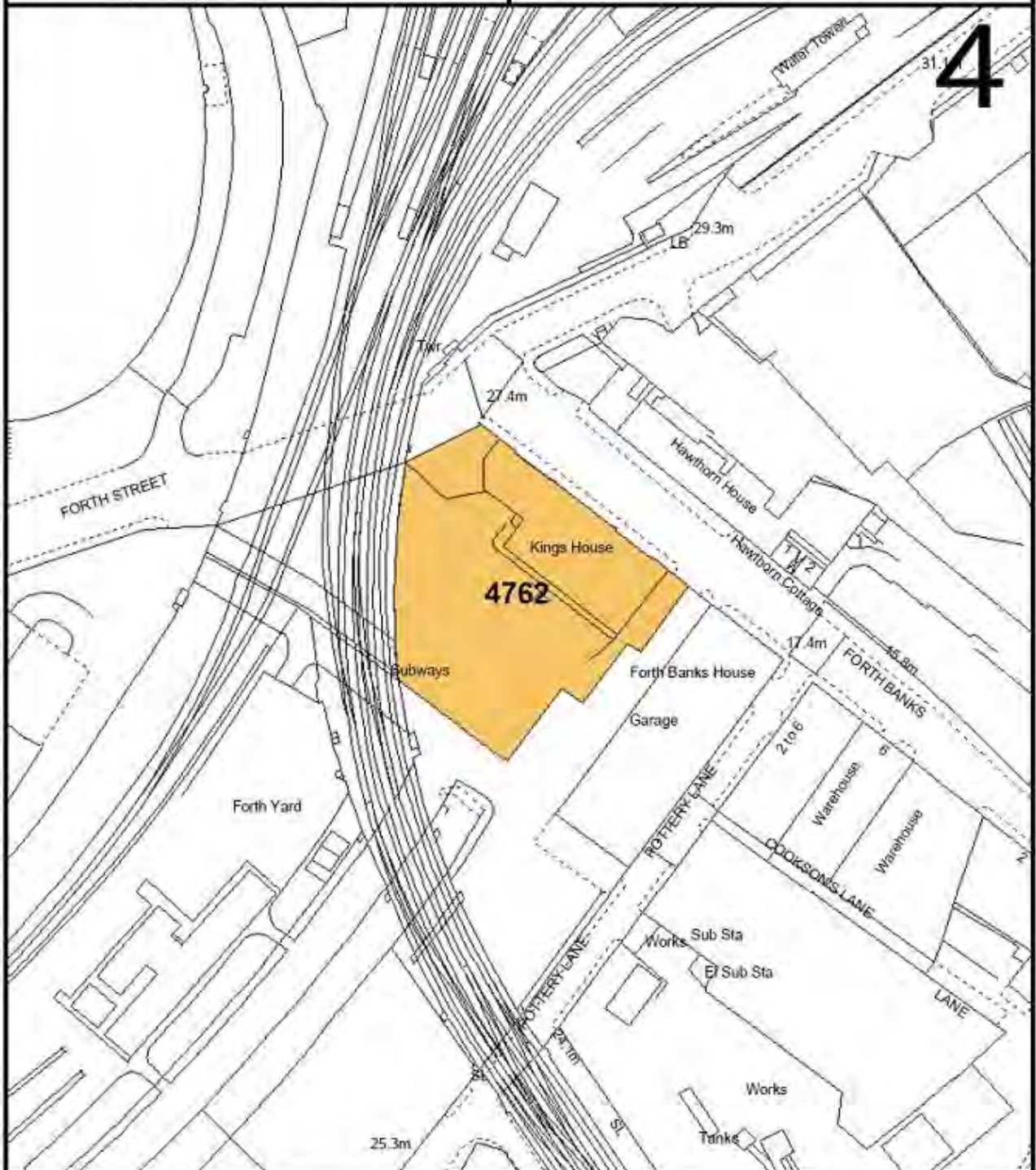
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Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma

Site Reference & Address	4398: North Eastern Co-op, 117 Newgate Street		
Area (hectares)	0.45ha		Comments
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	√
Internal Environment	Good	Average	Poor
	√		
External Environment	Good	Average	Poor
	√		
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	
Ground floor: foodhall, upper floors former retail space now vacant. (2)			
Located in defined retail core UDP Policy R2. (2)			
1.43ha available as part of a comprehensive redevelopment. Foodhall would need to be relocated. (2)			
Grade II listed building. (3)			
Central Conservation Area. The Gate (5 storey) building is attached to the COOP building to the south. Eldon Square extension is opposite. Noise associated with adjacent leisure. (2)			
Pedestrian access can be gained via Newgate Street and St Andrews Street. Service entrance via Stowell Street. (3)			
Highly accessible on main bus routes. Public Accessibility Grade A+. (5)			
The building is listed and very attractive, however previous studies indicate the site would not be financially viable for residential. Deep floorplate more appropriate for B1 uses, but limited demand for refurbished office space. (2)			
Below average demand. Refurbishment prohibited by conservation issues. Unlikely to achieve Grade A office space on the site without demolition. (3)			

TOTAL SCORE	21
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Kings House and Forth Yard East
Forth Banks

Area (Ha) : 0.34

Map : NZ 2463 NW
NZ 2463 NE

Harvey Emms, B. A (Hons), M.R.T.P.I,
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Date of
Publication: 03/06/2009

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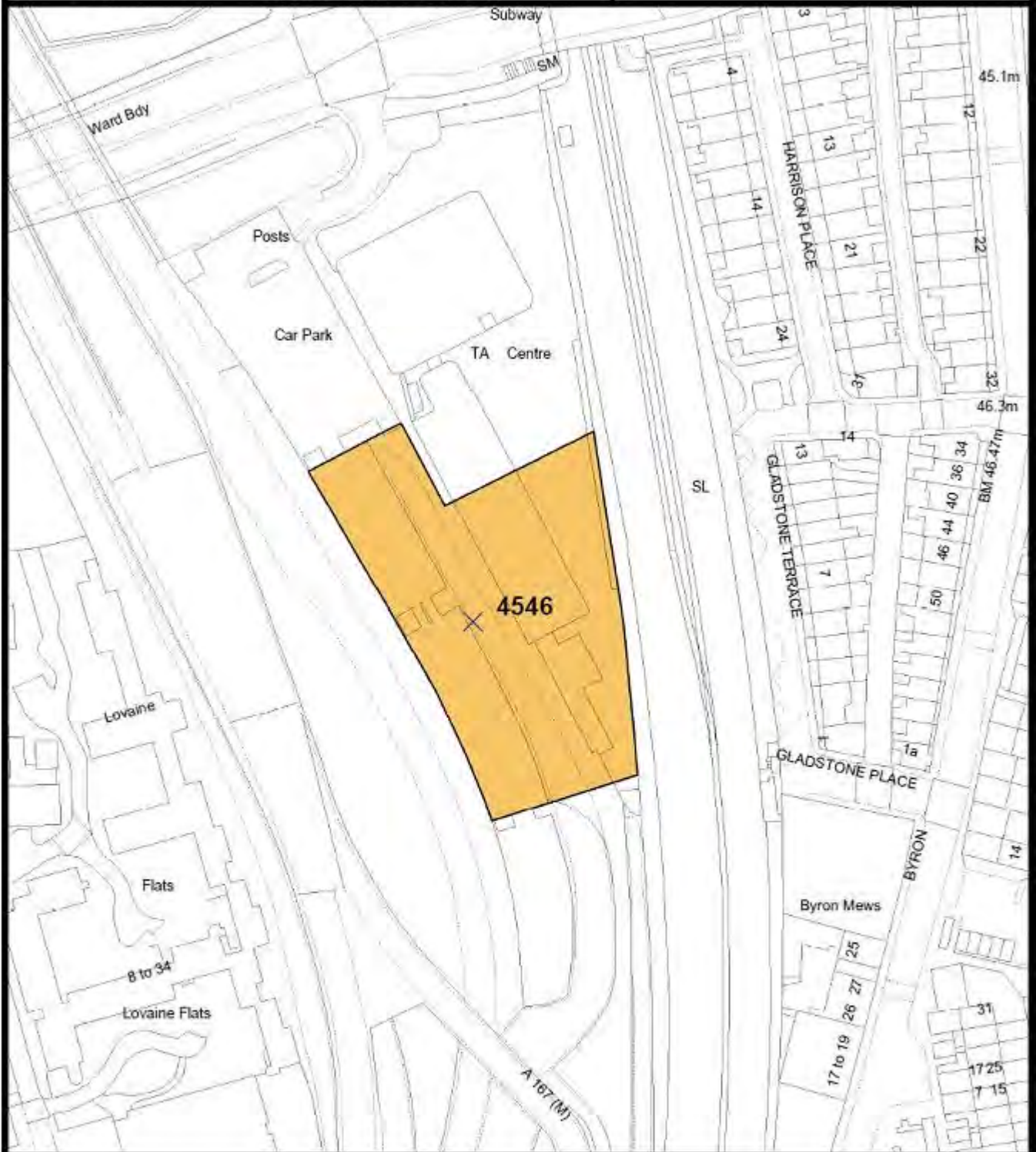
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A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4762: Forth Yard East including Kings House		
Area (hectares)	0.34ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
		√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
			√
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
			√
Existing building on site. (3)			
Vacant commercial (not allocated). (3)			
Feasibility study for Kings House has been prepared. (3)			
Listed building. (2)			
Concerns regarding tall buildings overlooking the site. Noise / vibration from existing road and rail network. (2)			
Via Waterloo Street / Peel Lane. (3)			
Highly accessible location. Public Transport Accessibility Grade A. (5)			
Viability issues in the short to medium term. (3)			
Unlikely to make significant contribution to the portfolio given the site area. Remove from Employment Land database. (0)			

TOTAL SCORE	25
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(Scoring: 5 = best, 1 = worst)



Address : TA Centre & Saint George's Car Park
Sandyford Road

Area (ha) : 0.43

Map : NZ 2964 NW
NZ 2964 SW

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Date of
Publication : 11/02/2008

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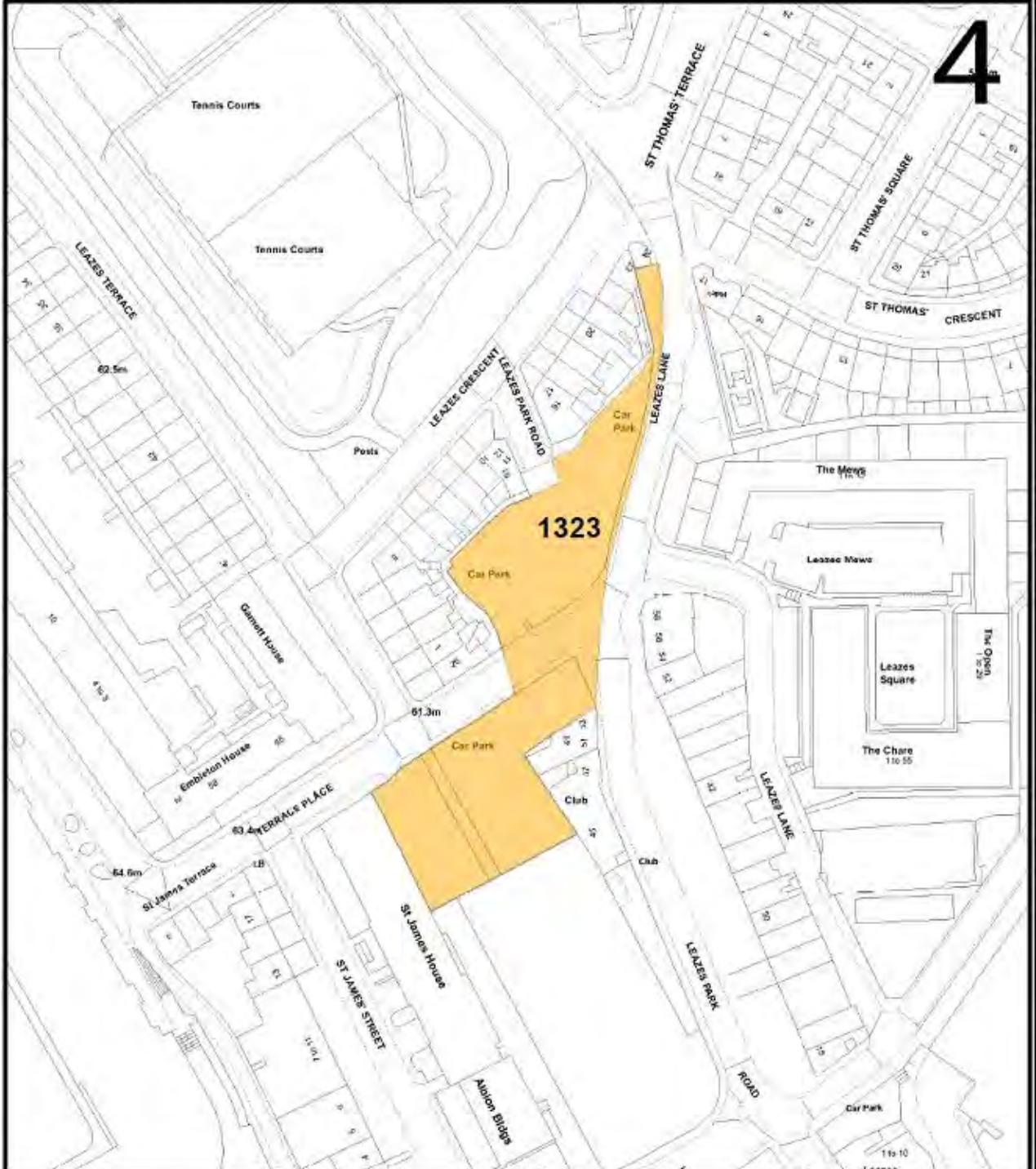
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4546: St George's Car Park & TA Centre		
Area (hectares)	0.43ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	

TOTAL SCORE	23
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Terrace Place Car Park

Area (Ha) : 0.34

Map : NZ 2464 NW

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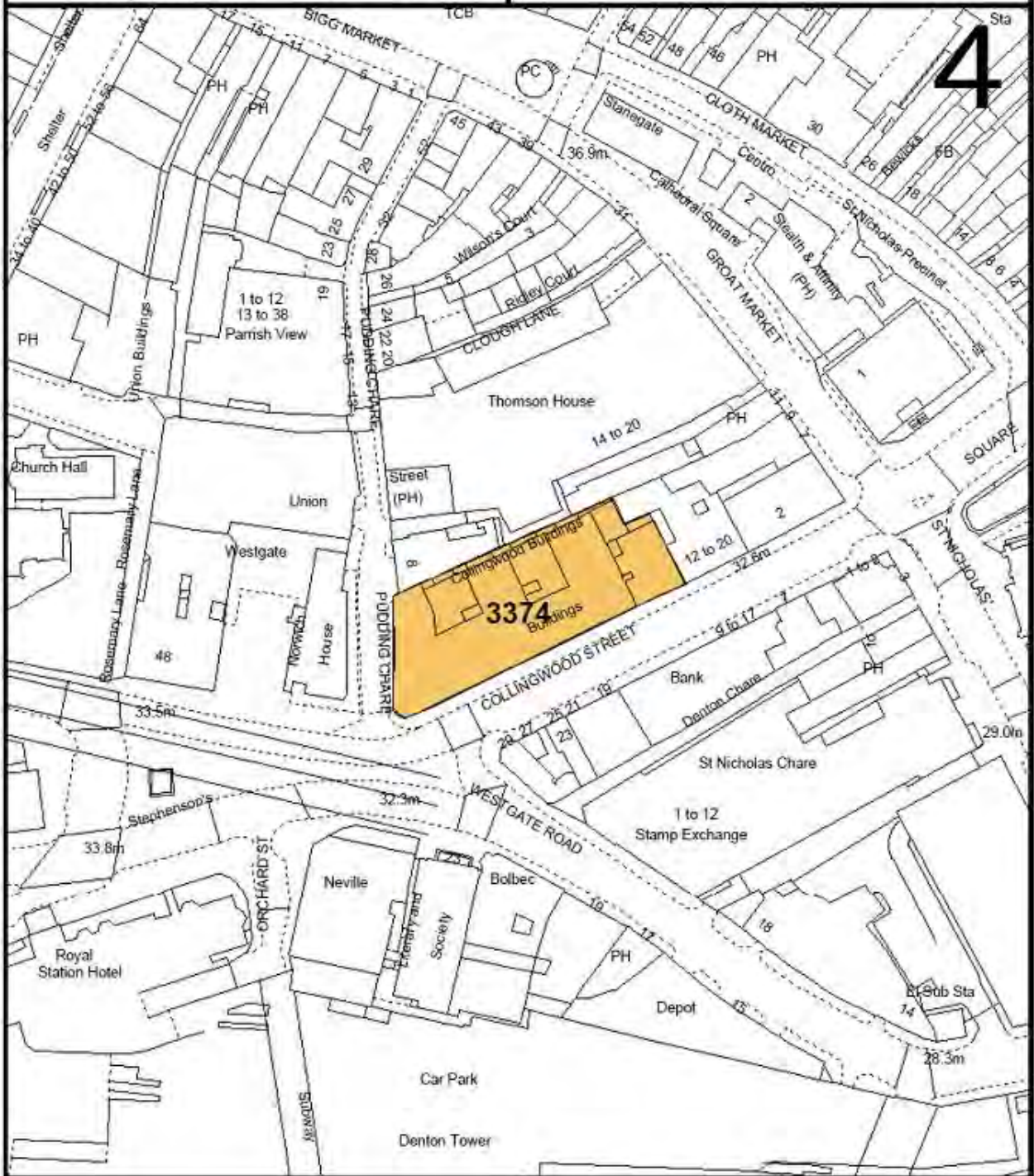
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J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1323: Terrace Place Car Park			
Area (hectares)	0.34ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Operational surface car park. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land in the UDP. First identified in 1982 Local Plan as development site. (3)
	N/A	N/A	N/A	
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Available (3)
			√	
Internal Environment	Good	Average	Poor	Operational service car park. Barker and Stonehouse have an easement across the southern car park. (3)
			√	
External Environment	Good	Average	Poor	A mix of retail, small commercial and residential. Leazes Conservation Area. (3)
		√		
Road Access	Good	Average	Poor	Via Terrace Place. Good access to City Centre and the Central Motorway (A167M). (3)
		√		
Public Transport	Good	Average	Poor	Close to St James/Haymarket Metro Stations and Haymarket Bus Interchange. (3)
	√			
Market Attractiveness	Good	Average	Poor	Small, irregular shaped nature of sites make viability questionable. (2)
			√	
Overall Assessment	Good	Average	Poor	Unlikely to be attractive to the market. (2)
			√	

TOTAL SCORE	25
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Collingwood Buildings (Upper floors)
Collingwood Street

Area (Ha) : 0.19

Map : NZ 2464 SE
NZ 2463 NE

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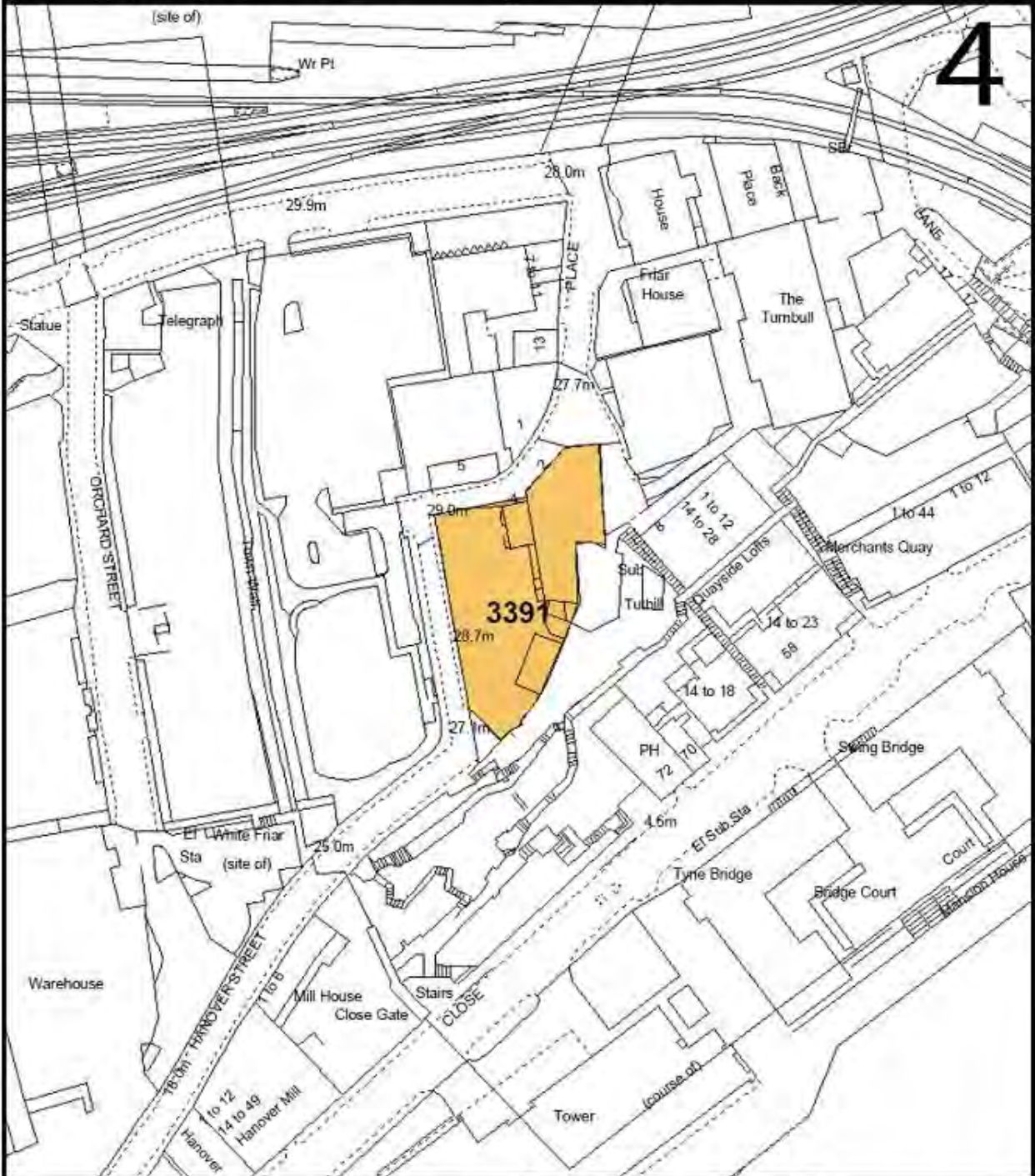
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3374: Collingwood Buildings, Mosley Street, Newcastle		
Area (hectares)	0.19 ha		Comments & Score out 5
Current Use	Office	Industrial	Mixed
	√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
			√
Former commercial building (Grade II listed). Vacant on upper floors. Ground floor mixed uses. (2)			
Commercial building. (3)			
Upper floors (4 levels) are available for refurbishment. (4)			
Former commercial building (Grade II listed). (2)			
Adjacent to commercial buildings. (3)			
Via Collingwood Street and Mosley Street. (3)			
City Centre location. Public Transport Accessibility Grade A. (5)			
Question of viability, given that the building is listed. Refurbishment of similar schemes in Grainger Town have not stacked up. (2)			
Limited demand for second hand office space. Refurbishment for residential may be a more viable option. The site is below the minimum threshold for inclusion within the threshold. (2)			

TOTAL SCORE	26
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(Scoring: 5 = best, 1 = worst)



Address : 2 - 4 Hanover Square	Area (Ha) : 0.17	Map : NZ 2463 NE
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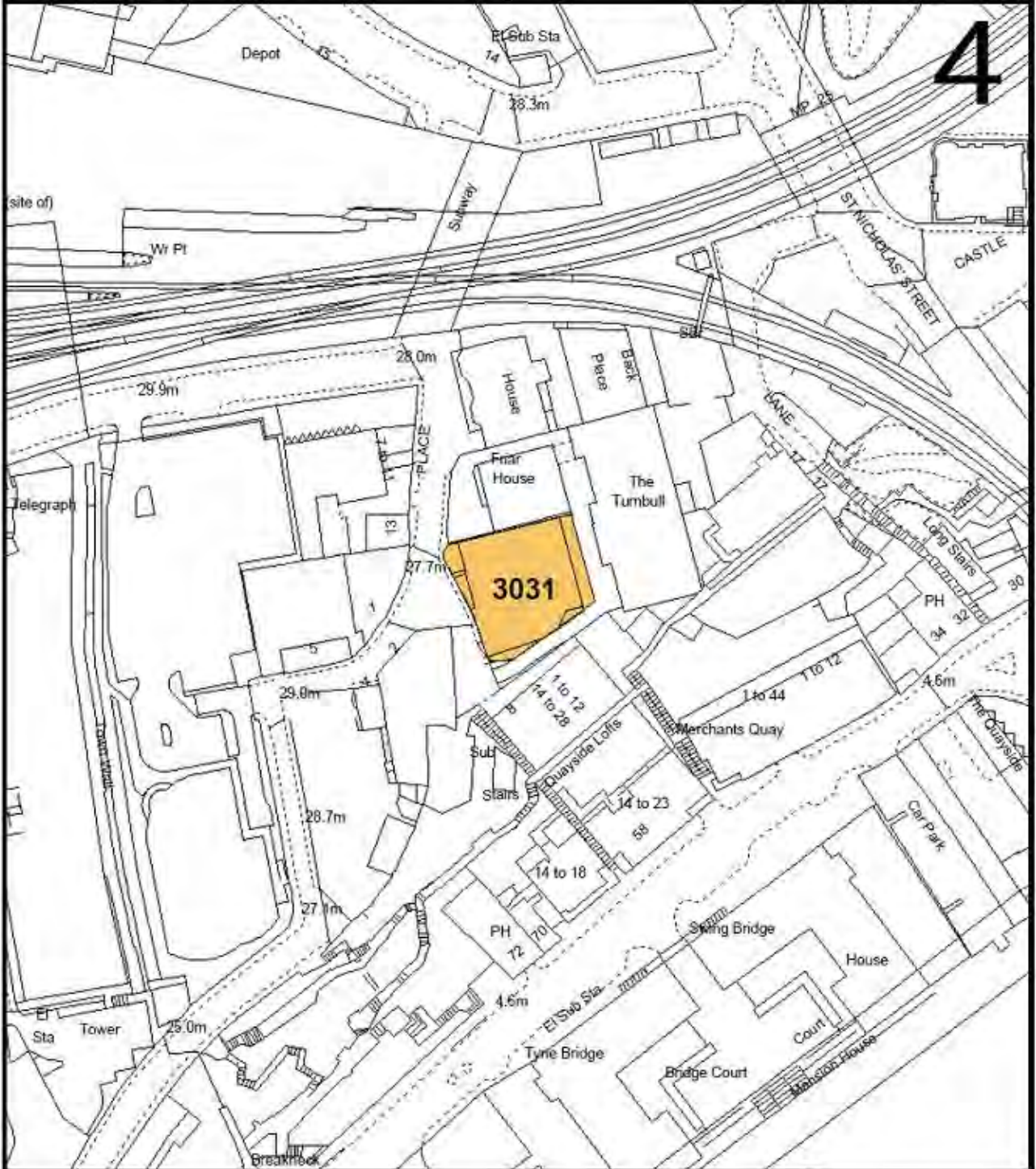
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3391: 2-4 Hanover Street		
Area (hectares)	0.17ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
			√
The site includes a 3 – 4 storey vacant property and associated car park. (3)			
UDP allocated for mixed use Policy ED3.2. City Centre, no sequential test required. Potential for office and residential in mixed use scheme. (3)			
Existing buildings in mixed use. (2)			
There are significant heritage, conservation and archaeological issues associated with the site. (2)			
Site lies within the Central Conservation Area. The area is predominantly a mix of residential buildings including Turnball Building, Quayside Lofts and office buildings. Stephenson Quarter is to the west of the site. (2)			
Via Hanover Street from the west or Hanover Square / Clavering Place from the north. (3)			
Close proximity to public transport. Public Transport Accessibility Grade A +. (5)			
Vacant building signifies no demand. Redevelopment of Stephenson Quarter may create interest in area. (2)			
Redevelopment unlikely to be viable in the short term. Residential may be more appropriate. Site too small to be included as part of the employment land review. (2)			

TOTAL SCORE	24
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(Scoring: 5 = best, 1 = worst)



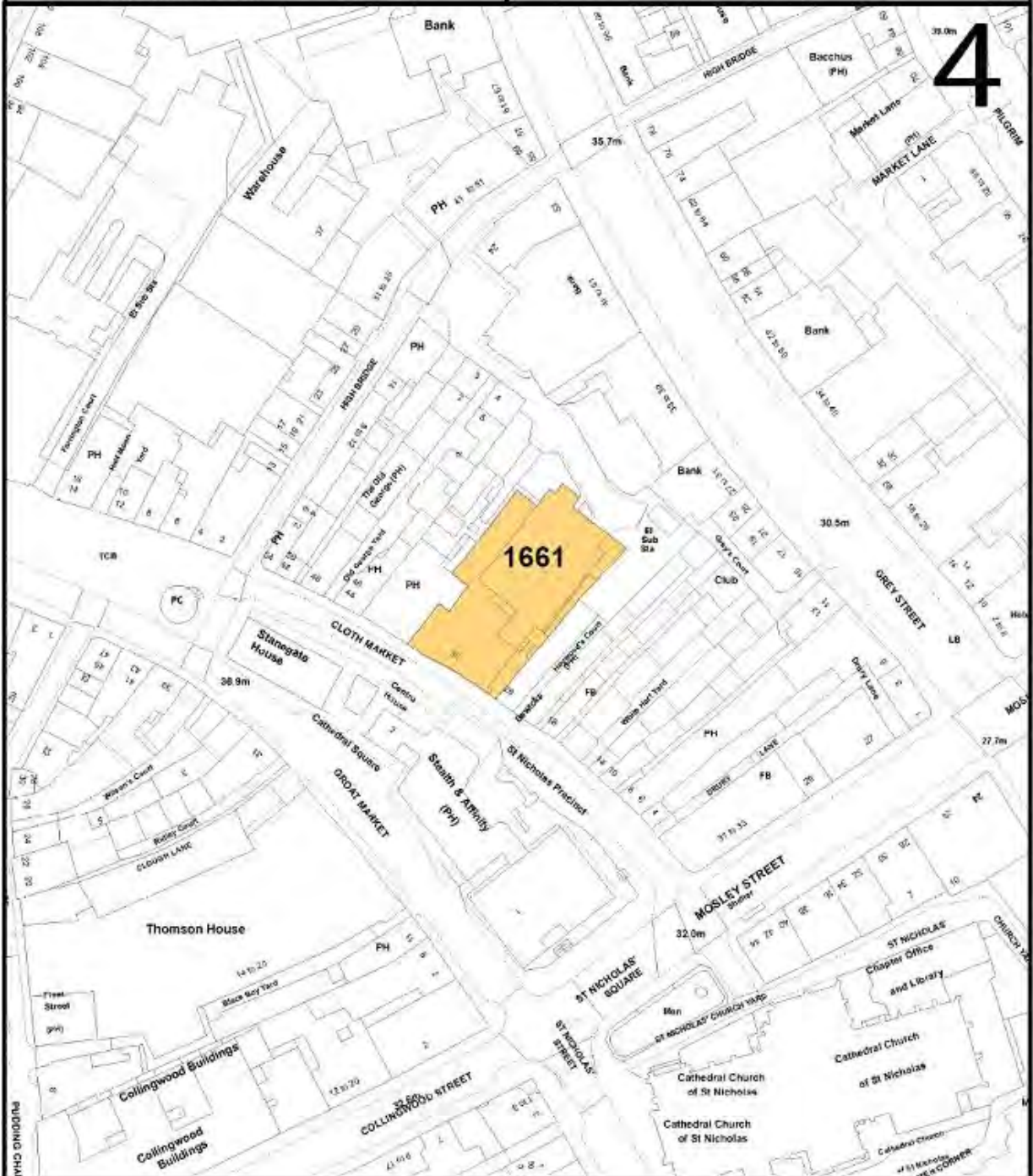
<p>Address : Site of Hanover Buildings 6 Clavering Place</p>	<p>Area (Ha) : 0.08</p>	<p>Map : NZ 2463 NE</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I., Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3031: Hanover Buildings, Clavering Place			
Area (hectares)	0.08ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Cleared site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Vacant, suitable for B1 use and / or residential. Extant permission for 2, 4 and 5 storey office block (2,371sq.m) (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Cleared site available for development. (4)
	√	√		
Internal Environment	Good	Average	Poor	Cleared site. (3)
			√	
External Environment	Good	Average	Poor	Site 3302 – B1 permission. (3)
		√		
Road Access	Good	Average	Poor	From Clavering Place. (3)
		√		
Public Transport	Good	Average	Poor	Good access to public transport. (5)
		√		
Market Attractiveness	Good	Average	Poor	No progress on B1 permission granted late 2005. (3)
		√		
Overall Assessment	Good	Average	Poor	Good location, constrained slightly by height restrictions due to conservation issues which may affect viability and demand. The site is too small for inclusion within the Employment Land Review. (3)
		√		

TOTAL SCORE	28
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(Scoring: 5 = best, 1 = worst)



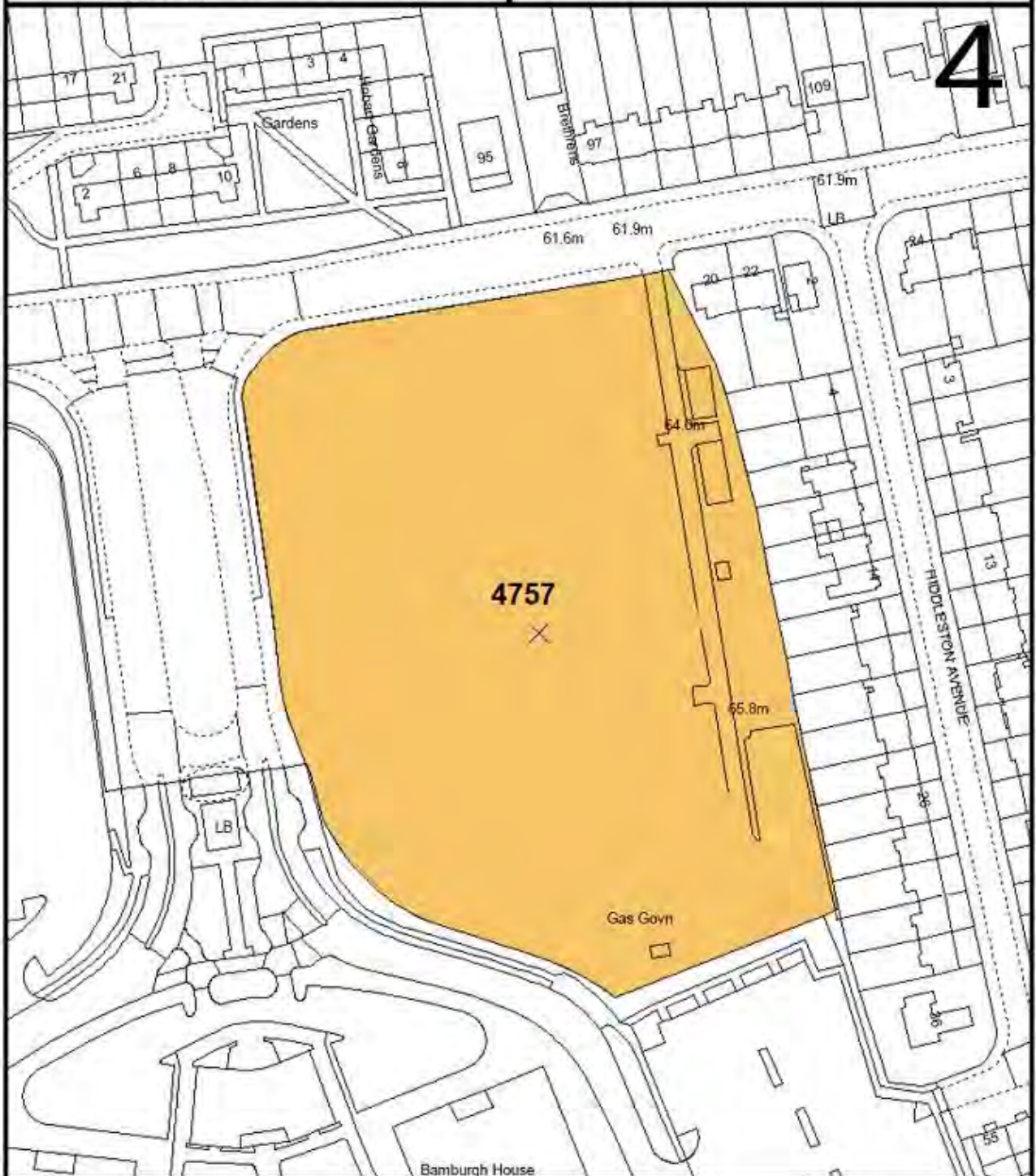
<p>Address : Former Dallas Carpets</p>	<p>Area (Ha) : 0.13</p>	<p>Map : NZ 2464 SE</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1661: Former Dallas Carpets			
Area (hectares)	0.13ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Retail. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	No overriding policy constraints. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Subject to existing user being decanted. (3)
	√	√		
Internal Environment	Good	Average	Poor	Steel frame building. (2)
		√		
External Environment	Good	Average	Poor	Commercial. (2)
		√		
Road Access	Good	Average	Poor	Close to strategic road network. (3)
	√			
Public Transport	Good	Average	Poor	Public transport within 200m from the site. Public Transport Accessibility Grade A (5).
	√			
Market Attractiveness	Good	Average	Poor	Infill site, maximizing accessible location. Potential to provide for new employment / mix of uses. (4)
	√			
Overall Assessment	Good	Average	Poor	Discount, the site is below the minimum threshold for inclusion within the Employment Land Review. (0)
	√			

TOTAL SCORE	25
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Land adjacent to DSS offices
Benton Park Road

Area (Ha) : 1.81

Map : NZ 2668 SE
NZ 2668 SW

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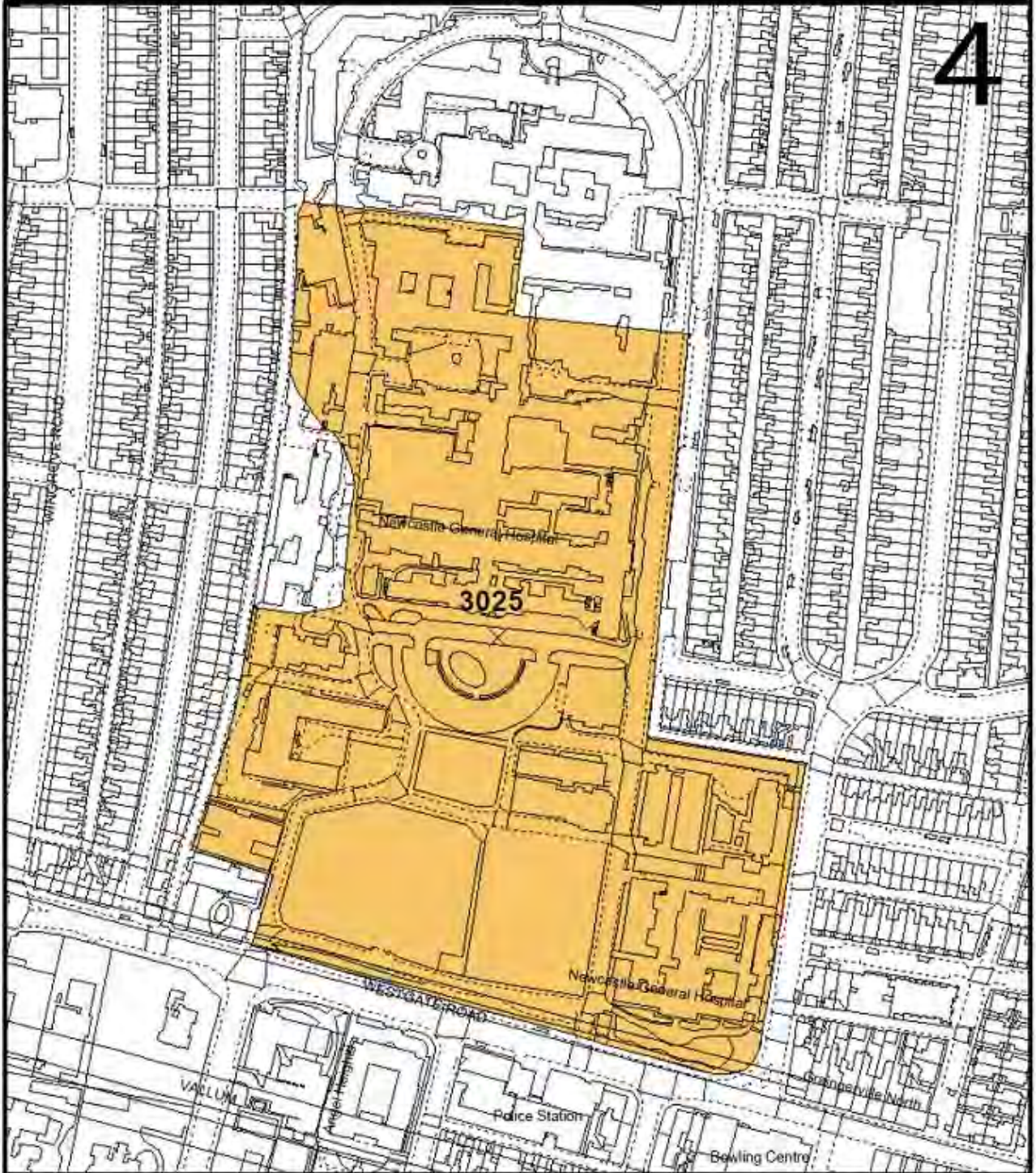
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4757: Land adjacent to DSS offices, Benton Park Road			
Area (hectares)	1.81ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Cleared site former DSS buildings. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated under Policy ED3.2 (5) for B1 business use. No sequential test required. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Cleared site. (3)
		√	√	
Internal Environment	Good	Average	Poor	Gently sloping site. (3)
		√		
External Environment	Good	Average	Poor	Residential fronting south side of Benton Park View. Site sandwiched between two schools. (2)
		√		
Road Access	Good	Average	Poor	Good access to Benton Park Road and the reasonably close proximity to the A19. (3)
	√			
Public Transport	Good	Average	Poor	Grade A: Over 147,000 economically active people aged 16 – 74 within 30 minutes of Benton Road by public transport. (5)
	√			
Market Attractiveness	Good	Average	Poor	Cleared site in existing office location, albeit edge of centre. (4)
	√			
Overall Assessment	Good	Average	Poor	Site is not sequentially preferable and housing is a more likely use in this location. (4)
		√		

TOTAL SCORE	30
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(Scoring: 5 = best, 1 = worst)



Address : Newcastle General Hospital
Westgate Road

Area (Ha) : 7.58

Map : NZ 2264 NE
NZ 2264 NW
NZ 2264 SE

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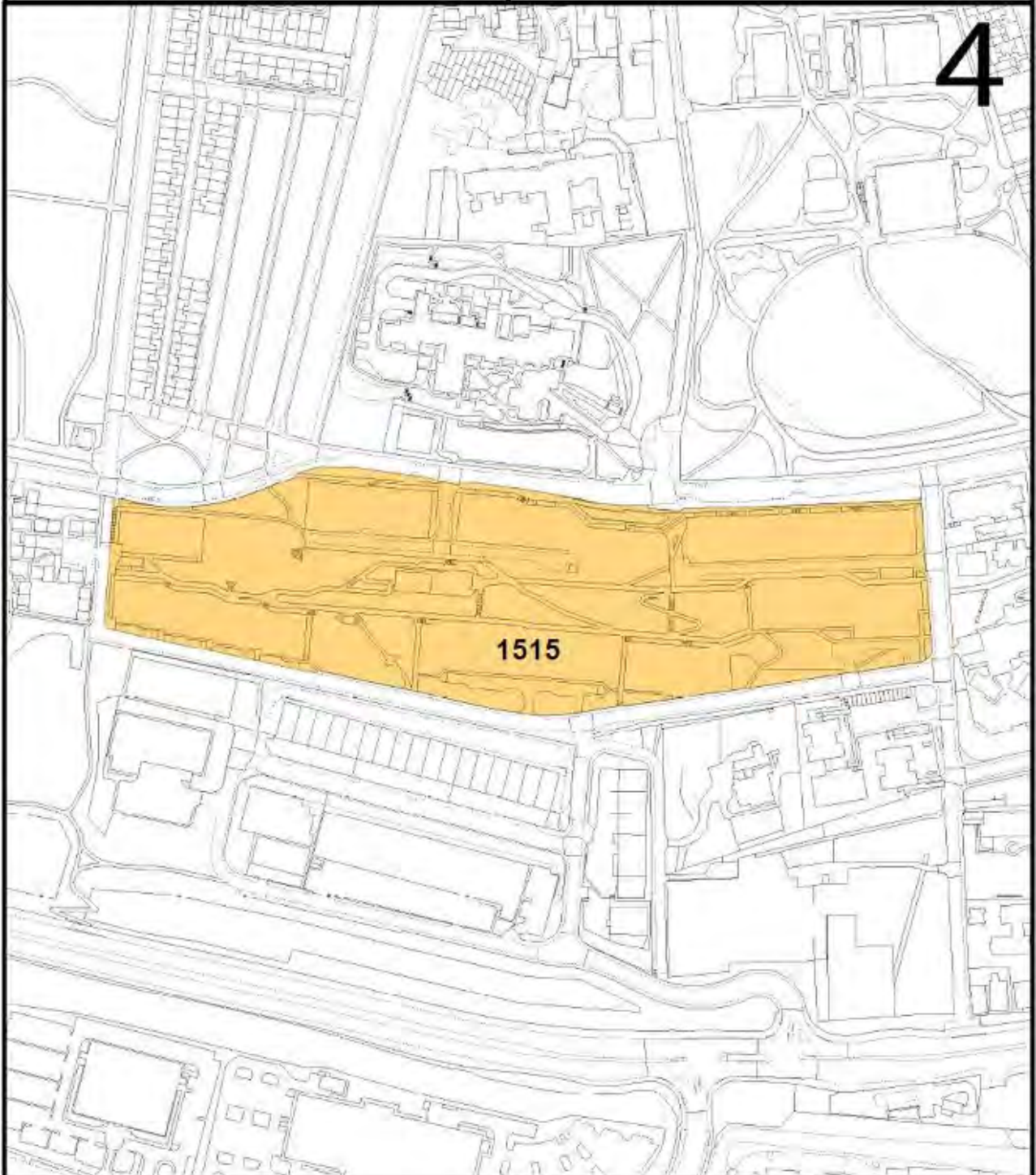
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3025: Newcastle General Hospital (NGP), Westgate Road			
Area (hectares)	7.58ha			
Current Use	Office	Industrial	Mixed	Former hospital site. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for mixed use development by the BSAAP. Sequential test required. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Available. Retail applications by Tesco have been refused. Application for B1 'Centre for Ageing' has been approved. (3)
	√	√		
Internal Environment	Good	Average	Poor	Gently sloping site, with some TPOs. (3)
		√		
External Environment	Good	Average	Poor	Residential to north, east and west. Police HQ and Angel Heights to the south. (3)
		√		
Road Access	Good	Average	Poor	Via Westgate Road. (3)
		√		
Public Transport	Good	Average	Poor	Public transport accessibility Grade A. (5)
	√			
Market Attractiveness	Good	Average	Poor	Strong occupier interest has been shown by a mix of commercial and retail uses. (4)
	√			
Overall Assessment	Good	Average	Poor	Application approved for Centre for Ageing Campus. (4)
	√			

TOTAL SCORE	31
--------------------	-----------

(Scoring: 5 = best, 1 = worst)



Address : Loadman Street

Area (Ha) : 5.06

Map NZ 22463 NE/SE
NZ 2363 NW/SE

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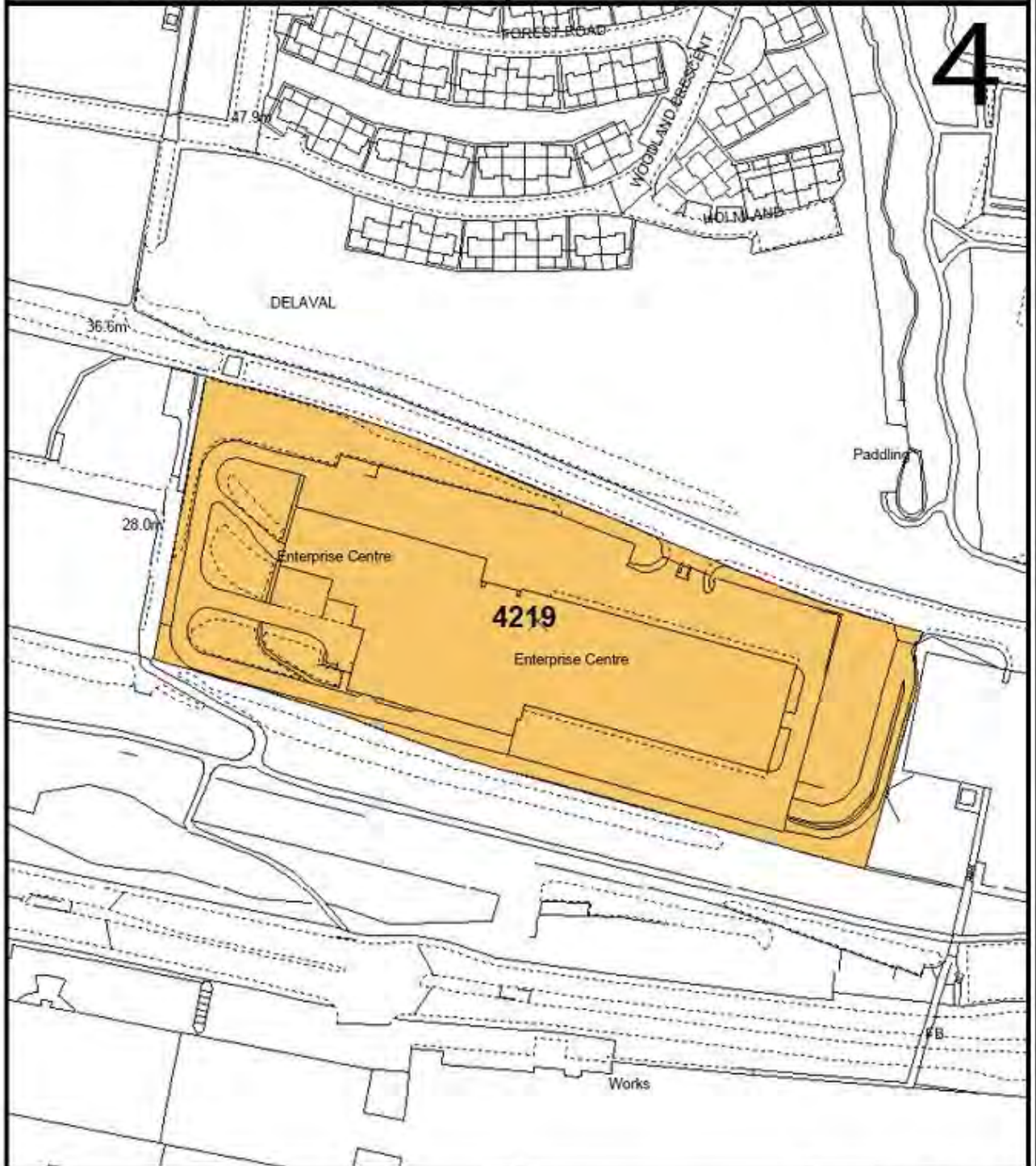
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1515: Loadman Street			
Area (hectares)	5.06ha			
Current Use	Office N/A	Industrial N/A	Mixed N/A	Largely, cleared brownfield site that used to be housing. (5)
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield √	Developed	
Undeveloped Land Availability	Short Term √	Medium Term	Long Term	Planning permission granted for 8 no. B1 office units (2446 sq.m.) and 12 no. B8 workshop units (gross floorspace 2250 sq.m.). (4)
Internal Environment	Good	Average √	Poor	Steeply sloping, otherwise unconstrained site. (3)
External Environment	Good	Average √	Poor	Adjacent to housing. (3)
Road Access	Good	Average √	Poor	The development will be assessed via two access points on Wolsingham Street and one access point on Beaumont Street. In order to facilitate movement to and from Scotswood Road, the section of Sanderson Street that is currently closed off will be re-opened. (2)
Public Transport	Good √	Average	Poor	Accessibility Grade B: 117,000+ economically active people within 30 minutes of site by public transport. (4)
Market Attractiveness	Good √	Average	Poor	Good. Council information indicates that there is a shortage of suitable office / business / workshop accommodation for SMEs in the West End. The site will provide alternative accommodation for businesses moving from the Whitehouse Enterprise Centre as part of the a west end strategy to retain and relocating existing businesses. (4)
Overall Assessment	Good	Average	Poor	Likely to come forward for housing - the site is identified in the SHLAA

TOTAL SCORE	32
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Whitehouse Enterprise Centre
Scotswood Cell I

Area (Ha) : 3.04

Map : NZ 2063 NE
NZ 2163 NW

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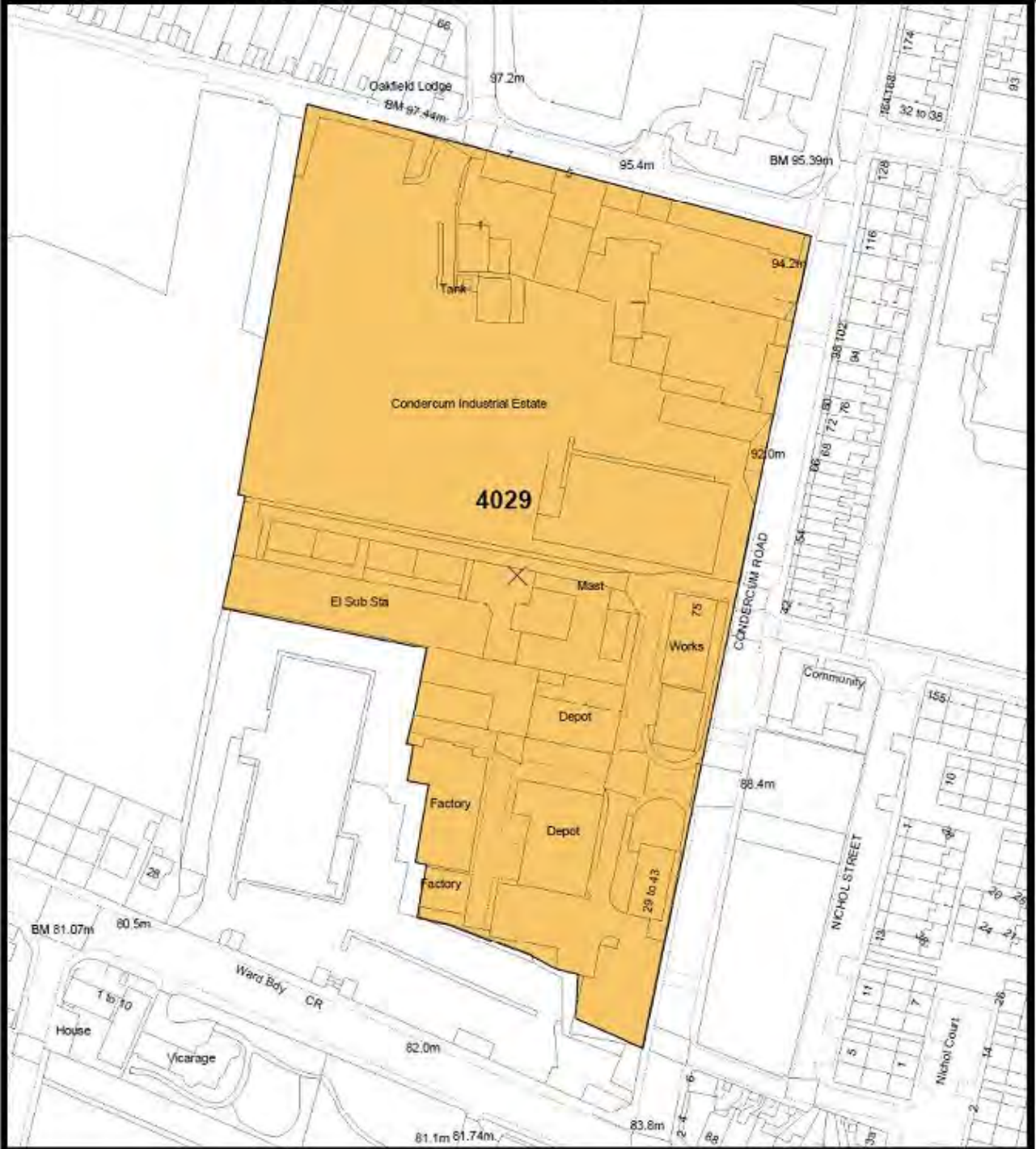
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4219: Whitehouse Enterprise Centre			
Area (hectares)	3.10ha			
Current Use	Office	Industrial	Mixed	Existing industrial estate. (3)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for industrial use under UDP Policy ED3.1 (9). (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant. (5)
	√	√		
Internal Environment	Good	Average	Poor	Major level changes to the site as site drops from Whitehouse Road to Scotswood Road. Contamination anticipated, notably at western boundary (former rock salt boundary). (3)
External Environment	Good	Average	Poor	Road network and B2/B8 development to the southern boundary. Open space and housing to the north. (3)
Road Access	Good	Average	Poor	Close proximity to Scotswood Road. (4)
	√			
Public Transport	Good	Average	Poor	Public transport accessibility Grade A. (5)
	√			
Market Attractiveness	Good	Average	Poor	The demolition of the former Whitehouse Centre is complete. The Council is in discussions with a multi national company who are interested in relocating their headquarters to the site in a design and build scheme. Viable with intervention by the public sector. (4)
	√			
Overall Assessment	Good	Average	Poor	Council information indicates that there is a shortage of suitable office / business / workshop accommodation for SMEs in the West End. (3)
		√		

TOTAL SCORE	33
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Condercum Industrial Estate
Condercum Road

Area (ha) : 2.73

Map : NZ 2164 SE

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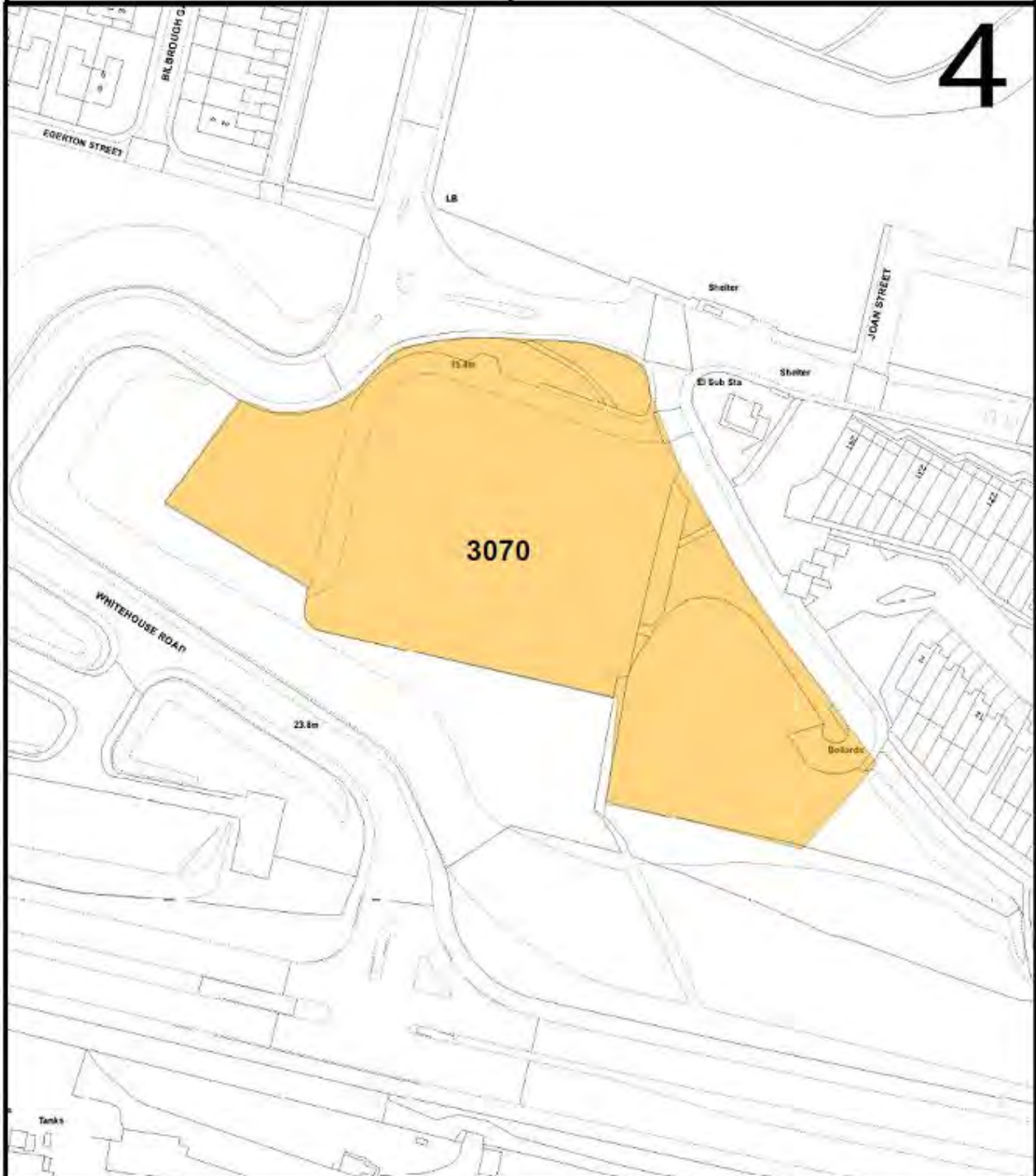
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**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4029: Condercum Road			
Area (hectares)	2.73ha			
Current Use	Office	Industrial	Mixed	Existing mixed commercial area, includes B2 uses, a car showroom and a public works depot. (4)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated in the BSAAP for mixed use development. (4)
			√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Existing occupiers would need to be decanted. (0)
		√		
Internal Environment	Good	Average	Poor	Telecommunications mast and electricity sub station have implications for the development of the site. (2)
External Environment	Good	Average	Poor	Residential to the west and eastern boundaries. (2)
Road Access	Good	Average	Poor	Via Condercum Road. (3)
		√		
Public Transport	Good	Average	Poor	Good: Accessibility Grade B, 117,000+ economically active people within 30 minutes of site by public transport. (4)
	√			
Market Attractiveness	Good	Average	Poor	Site could come forward for mixed use with a non-residential component of up to 4,650 sq.m. (3)
		√		
Overall Assessment	Good	Average	Poor	Unlikely to come forward in the foreseeable future, the site is not available or deliverable (0)
		√		

TOTAL SCORE	22
--------------------	-----------

(Scoring: 5 = best, 1 = worst)



Address : Violet Close and Buddle Road

Area (Ha) : 1.02

Map : NZ 2163 NE

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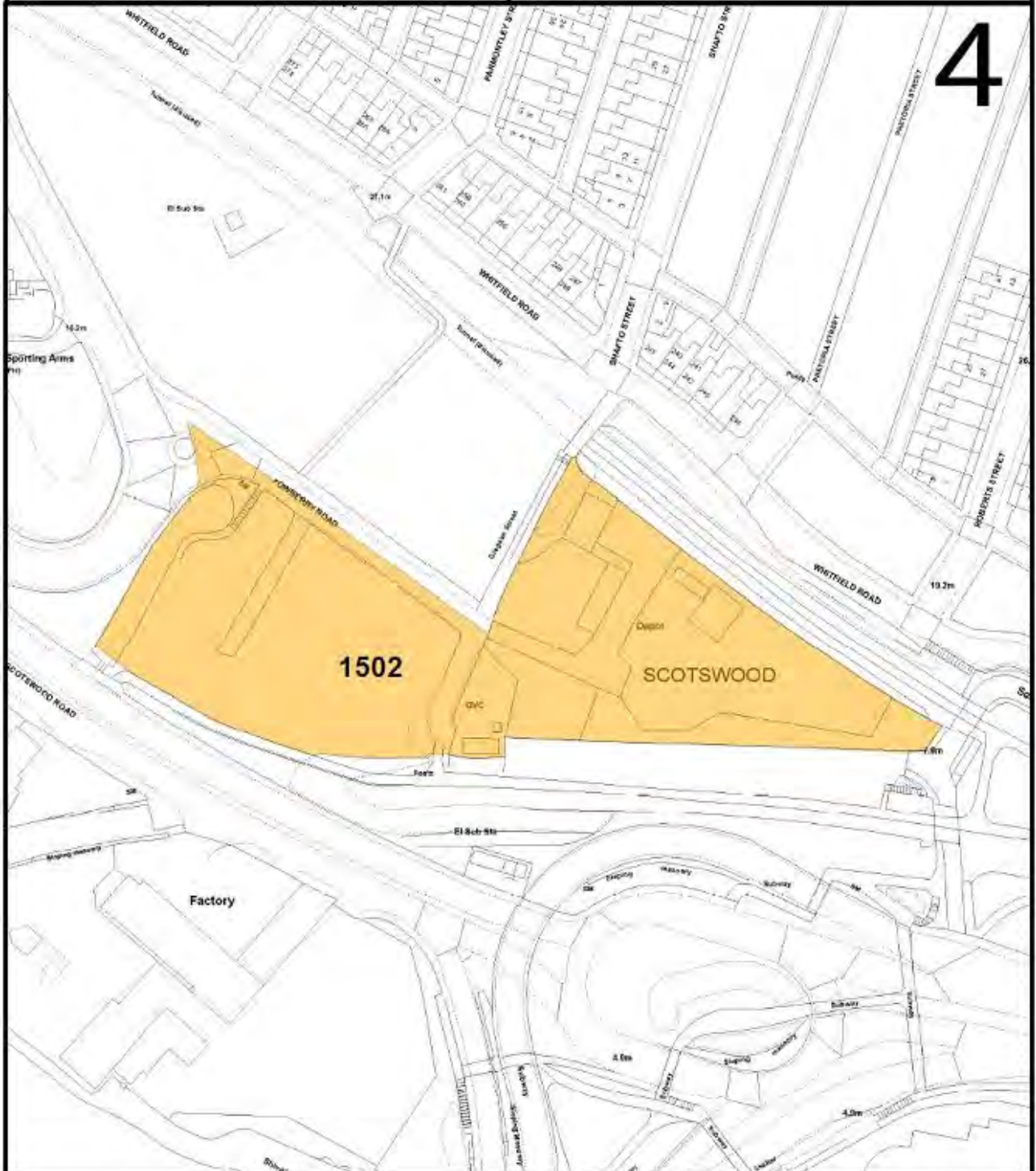
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3070: Violet Close and Buddle Road		
Area (hectares)	1.02ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
	N/A	N/A	N/A
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
	√		
Public Transport	Good	Average	Poor
	√		
Market Attractiveness	Good	Average	Poor
	√		
Overall Assessment	Good	Average	Poor
	√		

TOTAL SCORE	25
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(Scoring: 5 = best, 1 = worst)



Address : **Scotswood Bridge Head**

Area (Ha) : **1.22**

Map : NZ 2063 NW
NZ 1963 NE

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Scale : 1:1,500 @ A4

Date of
Publication: 19/03/2010

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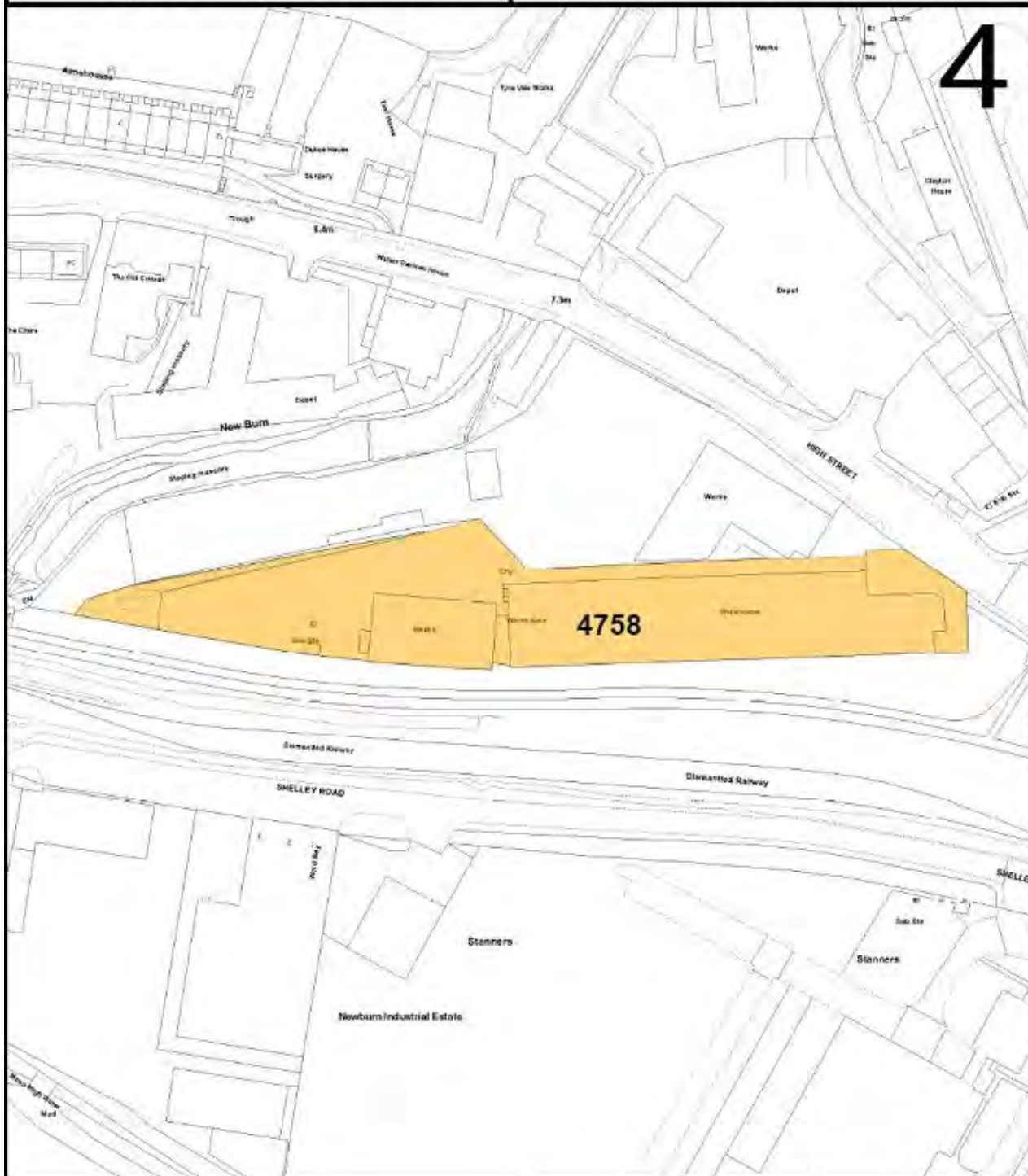
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1502: Scotswood Cell K, Land east of Denton Road.			
Area (hectares)	1.22ha			
Current Use	Office	Industrial	Mixed	Plant Hire / Vacant. (3)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated under UDP Policy ED1 for industrial development. Retained for economic development by the BSAPP (5)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Plant hire business operates from the eastern part of the site. Approx 50% is in active use (B1/B8). (3)
		√		
Internal Environment	Good	Average	Poor	Site slopes steeply from north to south, some traffic noise anticipated. (3)
		√		
External Environment	Good	Average	Poor	Industrial to the south, residential to the north. (3)
		√		
Road Access	Good	Average	Poor	Via A191 to west. (3)
		√		
Public Transport	Good	Average	Poor	Public transport accessibility Grade A. (5)
	√			
Market Attractiveness	Good	Average	Poor	Prominent, location when viewed from Scotswood Road. (3)
		√		
Overall Assessment	Good	Average	Poor	Small, isolated site. Unlikely, to be viable under current market conditions. (3)
		√		

TOTAL SCORE	31
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(Scoring: 5 = best, 1 = worst)



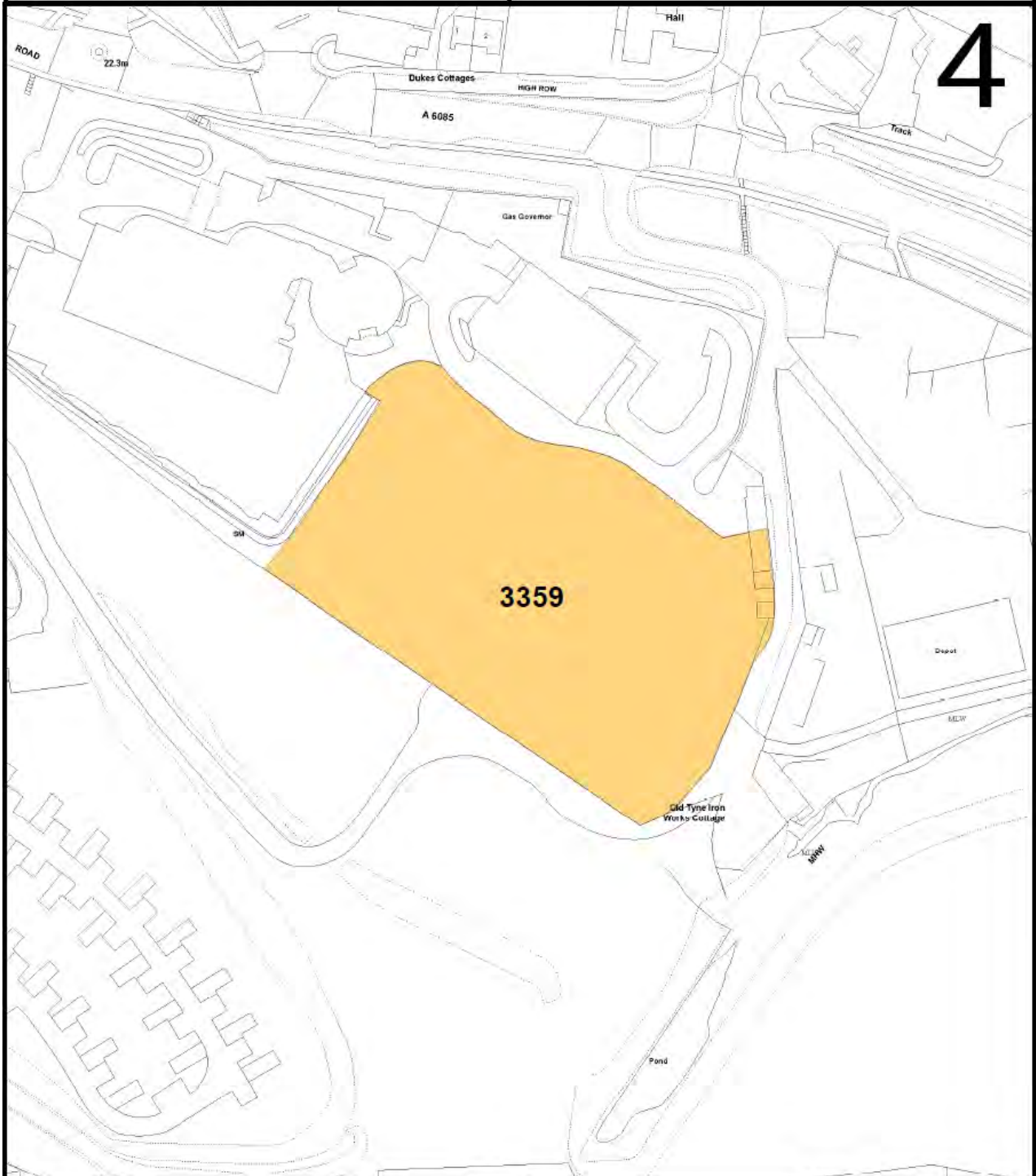
<p>Phoenix Works Address : High Street Newburn</p>	<p>Area (Ha) : 0.70</p>	<p>Map : NZ 1765 SW NZ 1665 SE</p>
<p>Harvey Emms, B. A (Hons), M.R.T.P.I, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne NE1 8PD Tel: (0191) 232 8520 Fax: (0191) 211 4998</p>		
<p>Scale : 1:1,500 @ A4</p>	<p>Date of Publication: 19/03/2010</p>	<p>© Crown copyright. All rights reserved. Newcastle City Council, 100019569, 2009 Drawn By: J McLaughlin</p>

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4758: Phoenix Works, High Street, Newburn			
Area (hectares)	0.70ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant B21, B8. (3)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for industrial use under UDP Policy ED3.1. Health checks indicate site will be de-allocated. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Subject to landowner bringing site forward. (3)
	√	√		
Internal Environment	Good	Average	Poor	No over-riding constraints. (2)
		√		
External Environment	Good	Average	Poor	Adjacent to scrapyards and BT. (2)
		√		
Road Access	Good	Average	Poor	Via Newburn High Street. (3)
	√			
Public Transport	Good	Average	Poor	Public transport within 200m from the site. Public Transport Accessibility Grade C (3).
	√			
Market Attractiveness	Good	Average	Poor	Adjacent industrial estate suffers from high voids, unlikely to be attractive to the market. (1)
	√			
Overall Assessment	Good	Average	Poor	Discount, the likelihood is that the site will come forward for housing (0)
	√			

TOTAL SCORE	20
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Lemington Glassworks

Area (Ha) : 1.06

Map : NZ 1864 NW/SW

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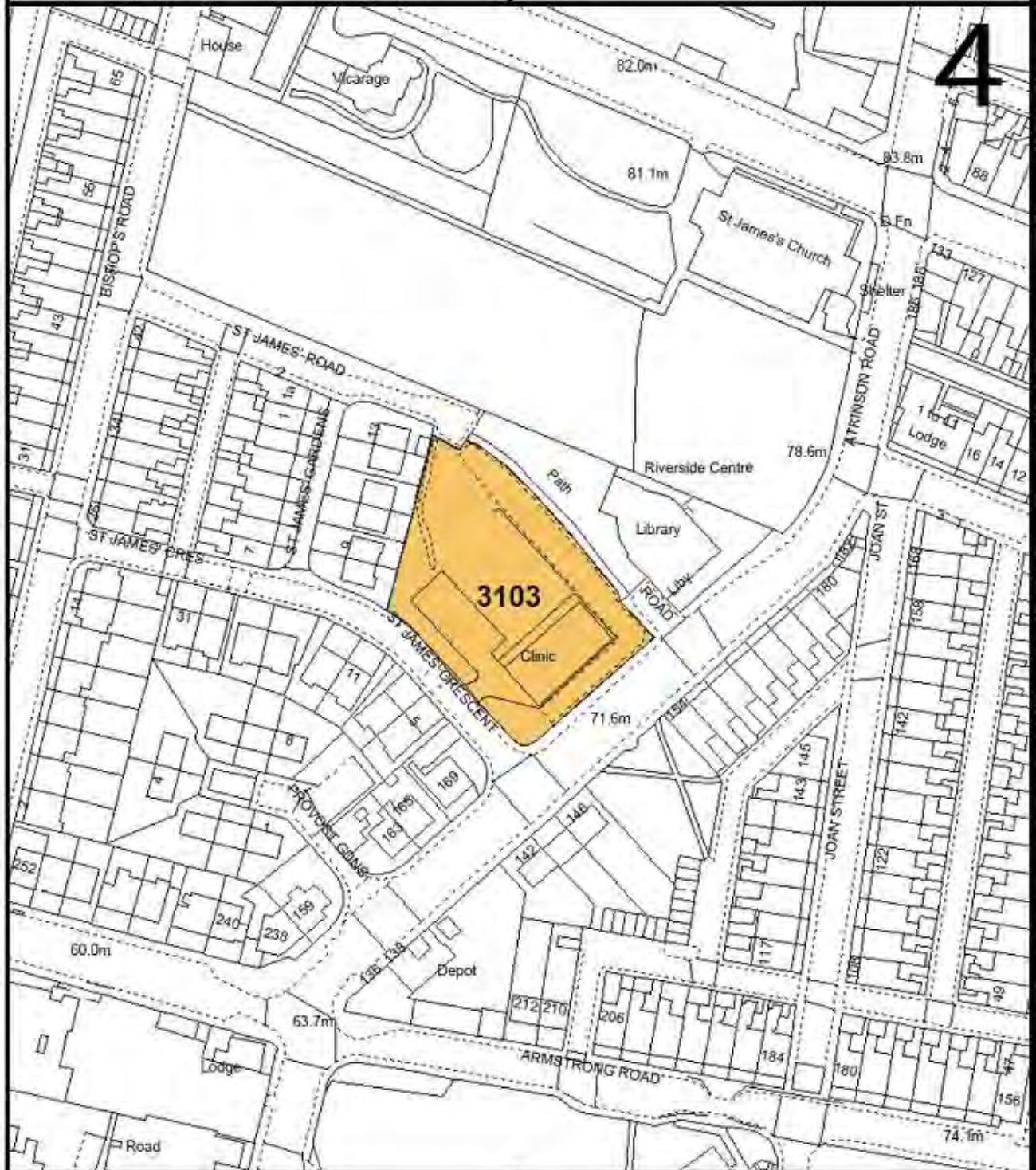
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3359: Lemington Glassworks		
Area (hectares)	1.06ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
			√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
			√
Overall Assessment	Good	Average	Poor
		√	
			Existing occupiers would need to be decanted. (0)
			Caravan storage park. Adjacent to Newburn Haugh Industrial Estate. (3)
			White land. (5)
			Flat site with retaining wall to the west. Contamination likely. (3)
			Surrounding area is vacant former industrial. Adjacent to Lemington Cone Grade 2*. (3)
			Via Lemington Road. (3)
			Public transport accessibility grade C. (3)
			Existing use viable, no incentive to redevelop in the short term. (1)
			The site forms part of UDP ED3.1 (18) which is to be de-allocated from employment use. The likelihood of the site coming forward for employment uses is very limited. (3)

TOTAL SCORE	21
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Atkinson Road Clinic
Saint James Crescent

Area (Ha) : 0,26

Map : NZ 2163 NE

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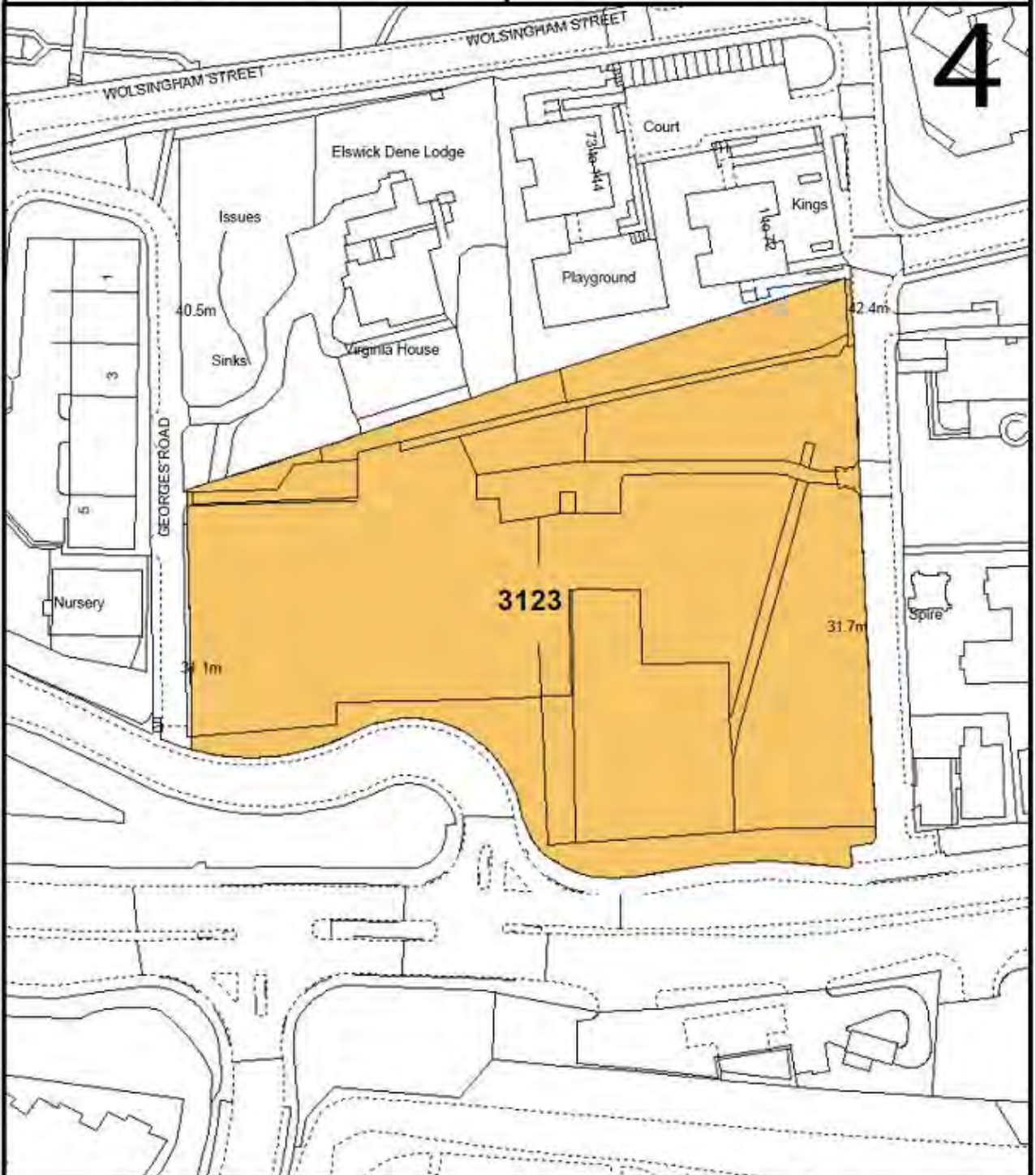
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3103: Atkinson Road			
Area (hectares)	0.26ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Existing medical centre and car park and also vacant library building. (3)
			√	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for mixed use development by the BSAAP. (3)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Existing users would need to be decanted. (2)
		√		
Internal Environment	Good	Average	Poor	Site slopes from north to south. Level change to library site. (3)
		√		
External Environment	Good	Average	Poor	Surrounded by residential. (2)
		√		
Road Access	Good	Average	Poor	Close proximity to West Road and Scotswood Road. (3)
		√		
Public Transport	Good	Average	Poor	Public transport accessibility Grade A. (5)
	√			
Market Attractiveness	Good	Average	Poor	Unlikely to be viable in current market conditions. (2)
		√		
Overall Assessment	Good	Average	Poor	Site could come forward for a number of uses including residential. (2)
		√		

TOTAL SCORE	25
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Site of Mary Trevelyan Primary School
Brunel Terrace

Area (Ha) : 1.65

Map : NZ 2263 SE
NZ 2363 SW

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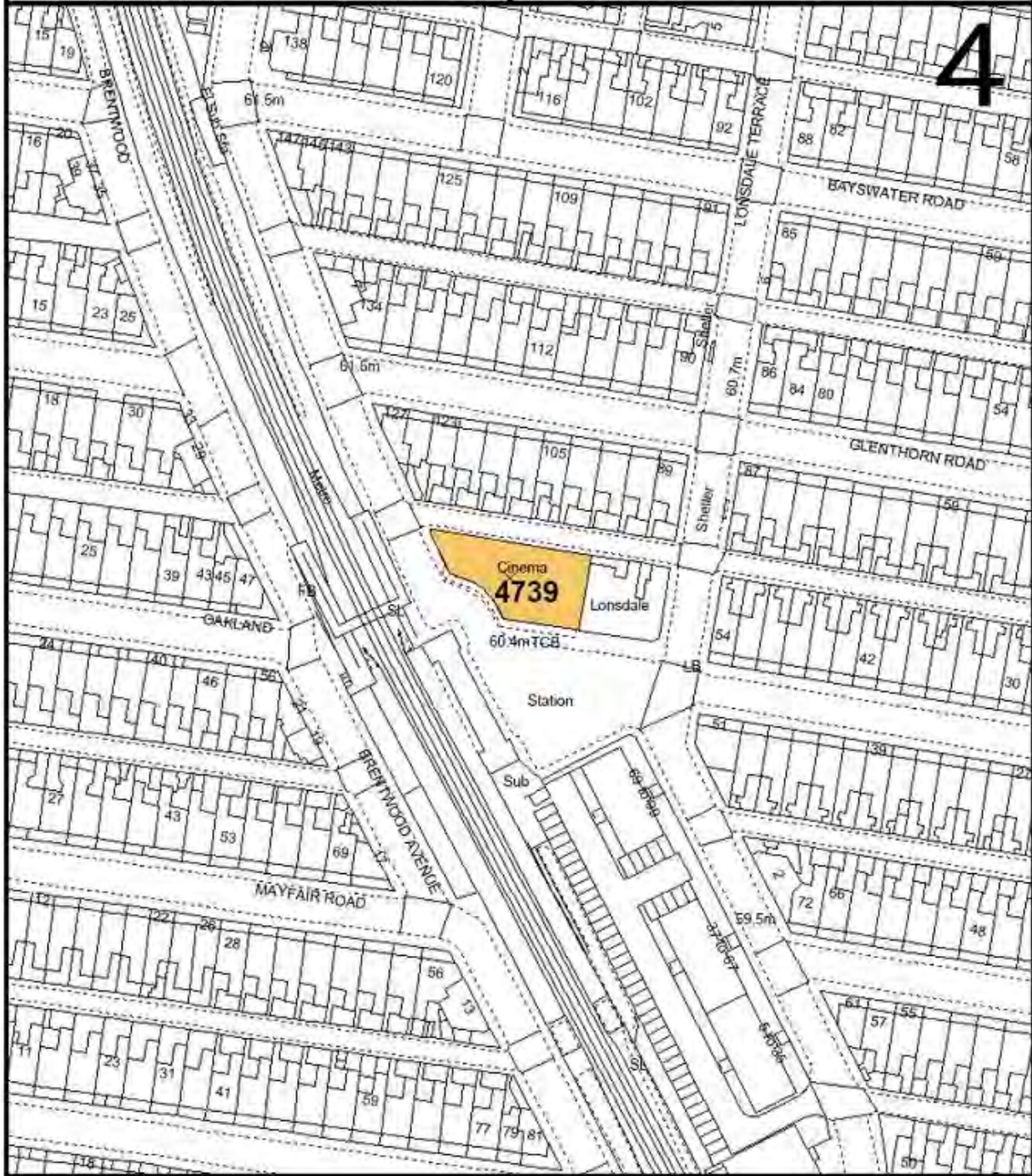
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	3123: Former Mary Trevelyan School			
Area (hectares)	1.65ha		Comments & Score (out of 5)	
Current Use	Office	Industrial	Mixed	Vacant, cleared site. (5)
	N/A	N/A	N/A	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	White land. Adjacent to main movement corridor (Scotswood Road) and Noble Street Industrial Estate. Sequential test would be required for town centre uses. (4)
		√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Vacant site, available for redevelopment. (4)
	√	√	√	
Internal Environment	Good	Average	Poor	Site slopes from north to south. Mature trees to boundary and on site. Possible knotwood. Wildlife corridor to southern boundary. (3)
		√		
External Environment	Good	Average	Poor	Residential and nursery to the northern boundary. Church to east and B2 to western boundary. (2)
		√		
Road Access	Good	Average	Poor	Via Scotswood Road. (3)
		√		
Public Transport	Good	Average	Poor	Public accessibility Grade A+ (5)
Market Attractiveness	Good	Average	Poor	Viability constraints in the current market, however current interest from national car dealership and supermarket retailer. (2)
		√		
Overall Assessment	Good	Average	Poor	Site benefits from prominent location adjacent to Scotswood Road but looks unlikely to come forward for employment uses. (3)
		√		

TOTAL SCORE	31
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : **Former Jesmond Picture House
Lyndhurst Avenue**

Area (Ha) : 0.06

Map : NZ 2566 NW

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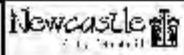
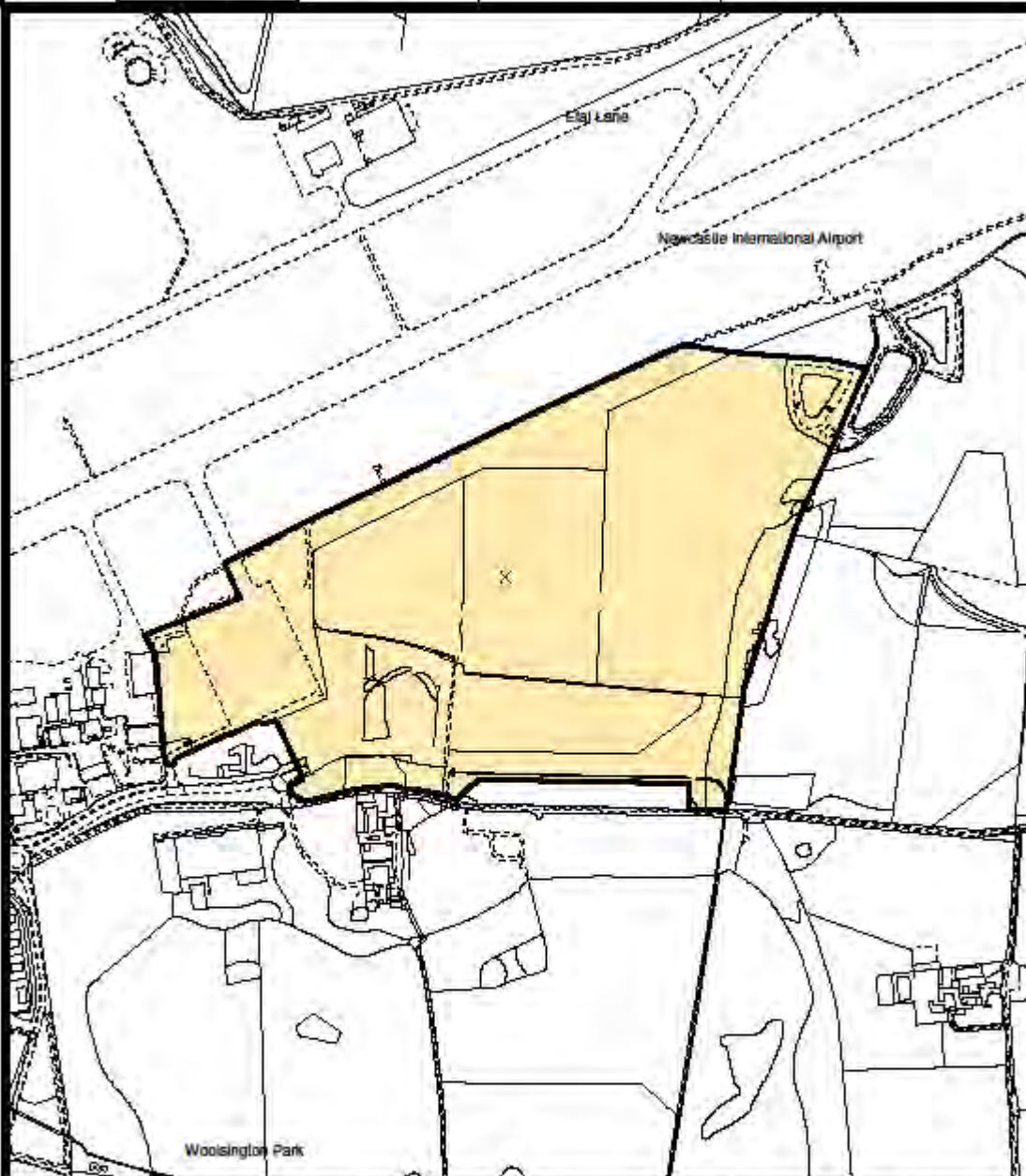
Drawn by :
A Mackenzie

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4739: Former Jesmond Picture House		
Area (hectares)	0.06ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
			√
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
		√	
Undeveloped Land Availability	Short Term	Medium Term	Long Term
	√	√	
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
		√	
Public Transport	Good	Average	Poor
		√	
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
			√

TOTAL SCORE	23
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(Scoring: 5 = best, 1 = worst)

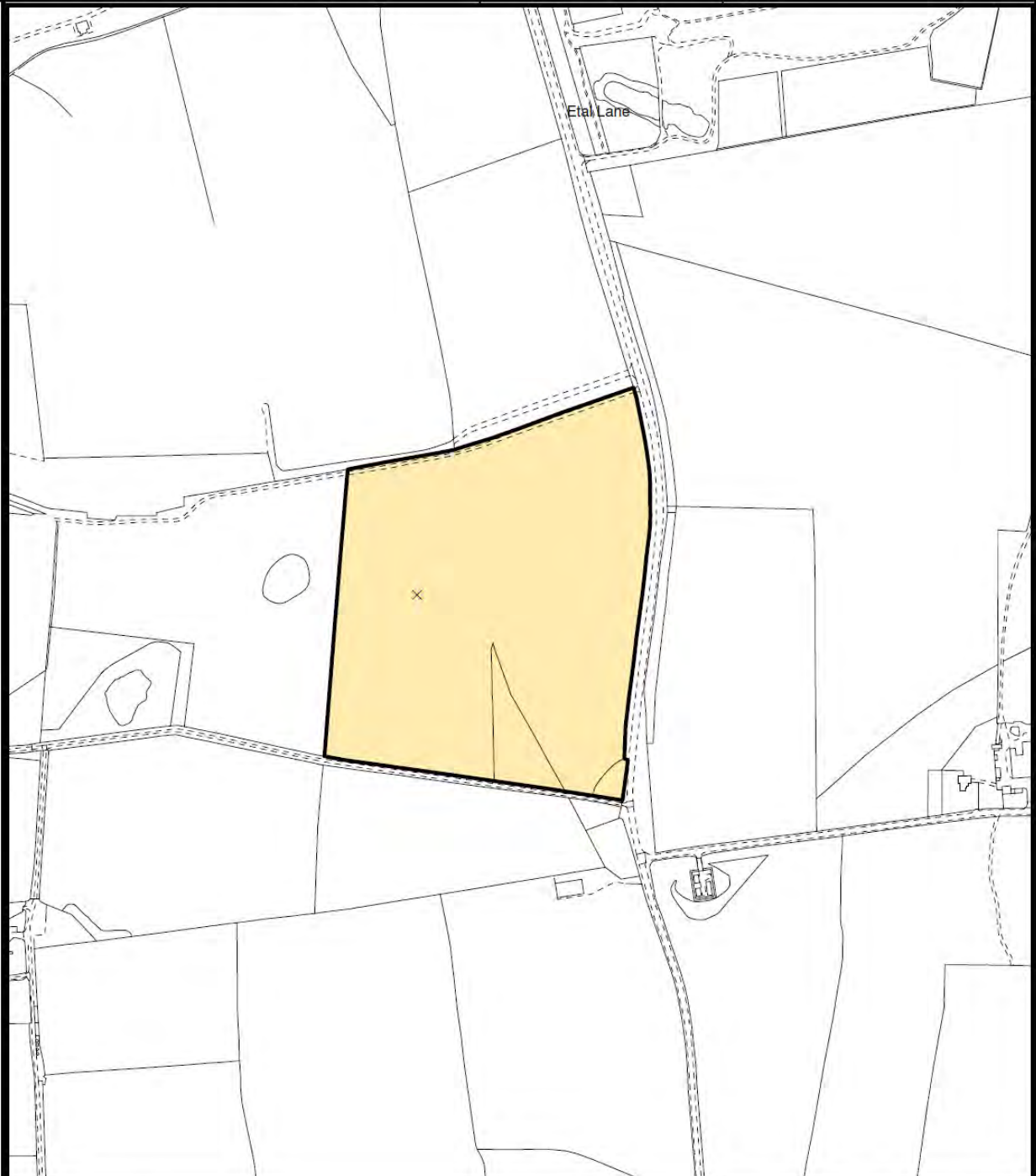
	Land Resource	1713
		
Address : Land south of Newcastle Airport	HÀ: 35:40	Map: 1971SE 2070NW 2071NW 2071NE 2071SW
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Scale : 1:7,000	Date: 18/06/2013	Drawn by : DMH Paul Herbertson Director of R & P

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	1713: Southside, Newcastle Airport			
Area (hectares)	40.88 ha			
Current Use	Office	Industrial	Mixed	Existing infill site, associated with airport operations. (4)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for airport related uses under UDP Policy ED1.4 and also RSS Policy 21. (4)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Western part in active use. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Flat, serviced site. Trees to southern boundary. (3)
		√		
External Environment	Good	Average	Poor	Airport related uses. (3)
		√		
Road Access	Good	Average	Poor	Via Middle Drive. (3)
		√		
Public Transport	Good	Average	Poor	NULL score on public transport accessibility model. However, good access via bus and metro. (3)
	√			
Market Attractiveness	Good	Average	Poor	Part of 'Newcastle International Southside Development' by UK Land Estates. Site A comprises over 450,000 sq.ft. of air freight, hanger and warehouse/distribution space. Planning permission has lapsed. (4)
		√		
Overall Assessment	Good	Average	Poor	Likely to come forward as part of the Airport's expansion plans when the market picks up. (4)
		√		

TOTAL SCORE	31
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : NGP West

HA: 13.17

Map: 2171SW
2071SE

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Scale : 1:6,000

Date: 18/06/2013

Drawn by : DMH

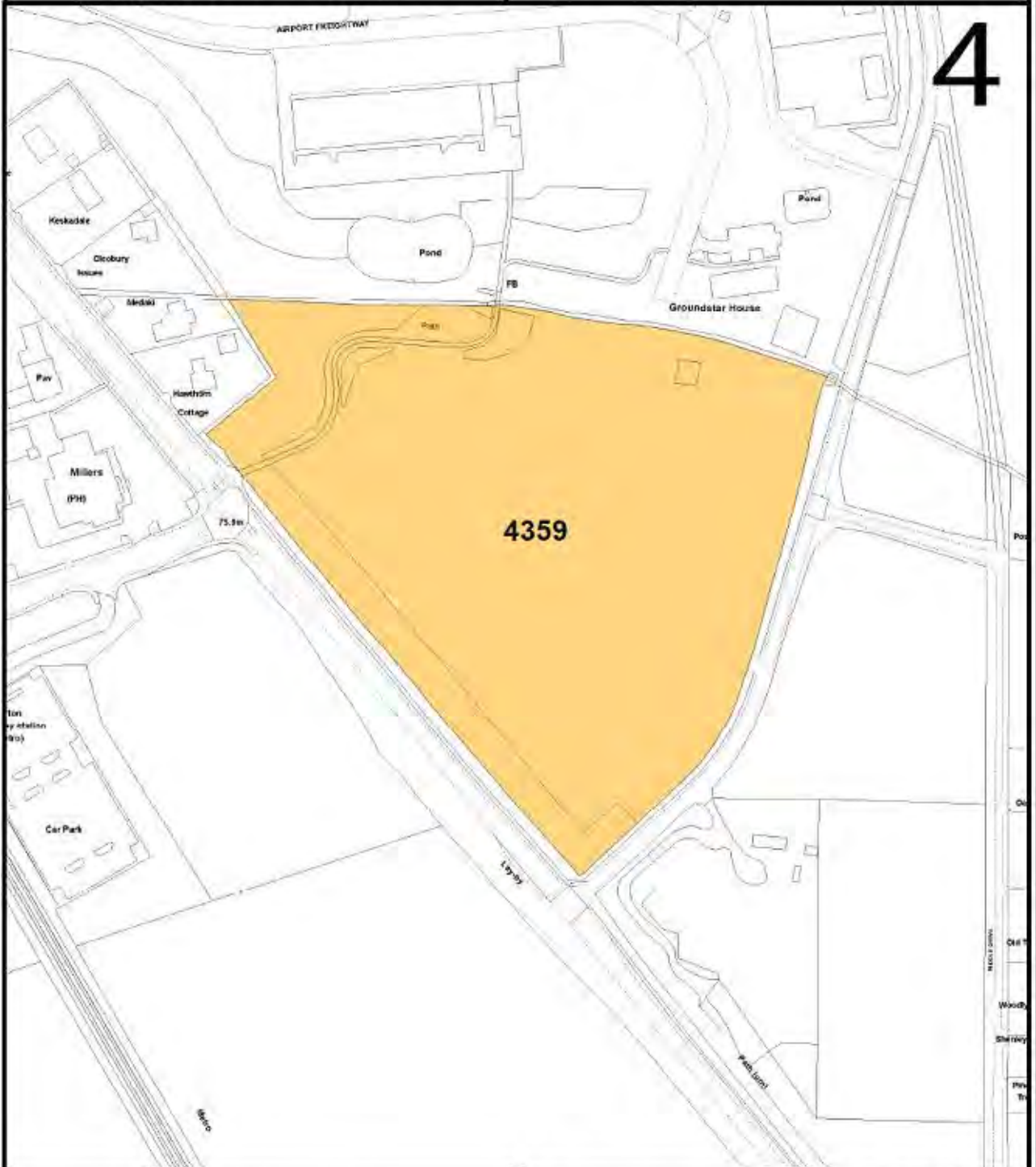
Paul Herbertson
Director of R & P

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	5146:Southside Expansion Site, Newcastle Airport		
Area (hectares)	12 ha		Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed
	√		
Undeveloped Land Availability	Short Term	Medium Term	Long Term
		√	√
Internal Environment	Good	Average	Poor
		√	
External Environment	Good	Average	Poor
		√	
Road Access	Good	Average	Poor
			√
Public Transport	Good	Average	Poor
			√
Market Attractiveness	Good	Average	Poor
		√	
Overall Assessment	Good	Average	Poor
		√	
The land comprises a combination of worked agricultural land subdivided into various fields and interspersed with areas of mature woodland (3)			
NGP western expansion area (3)			
. (3)			
N/A. (3)			
Fields/agricultural. Airport related uses in vicinity. (3)			
Infrastructure required (0)			
NULL score on public transport accessibility model. (0)			
Could come forward in the medium to long term for general employment or solus office park. (4)			
Likely to come forward as part of the Airport's expansion plans when the market improves. The Airport, although it currently lacks connection to major infrastructure, offers proximity to the metro, the A1 western bypass, and the A696. The site has the potential to be made accessible to labour and services. (4)			

TOTAL SCORE	23
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : South of Freight Village
Airport

Area (Ha) : 5.03

Map : NZ 1970 MW/SW

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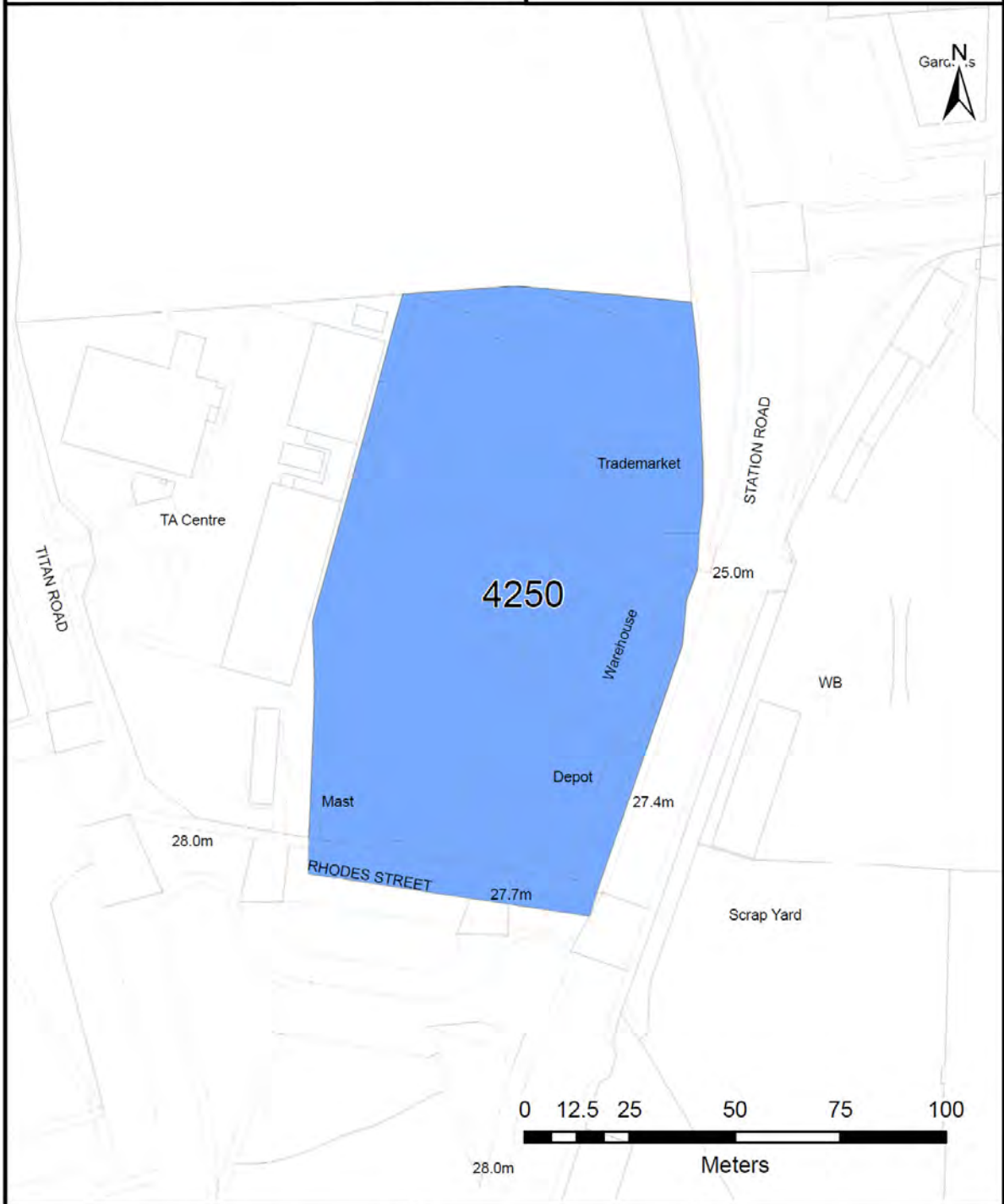
Drawn By:
J McLaughlin

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4359: South of Freight Village, Airport			
Area (hectares)	5.03ha			Comments & Score (out of 5)
Current Use	Office	Industrial	Mixed	Existing infill site, associated with airport operations. (3)
		√		
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated for airport related uses under UDP policy ED1.4 and also RSS policy 21. (4)
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	. (3)
	√	√	√	
Internal Environment	Good	Average	Poor	Flat, serviced site. Trees to north and west boundaries. Oak trees on site to be retained. Watercourse to the north. Woolsington Wood (SLCI) to the east. (3)
		√		
External Environment	Good	Average	Poor	Airport related uses. (3)
		√		
Road Access	Good	Average	Poor	Via Middle Drive. (3)
		√		
Public Transport	Good	Average	Poor	NULL score on public transport accessibility model. However, good access via bus and metro. (3)
	√			
Market Attractiveness	Good	Average	Poor	Part of 'Newcastle International Southside Development' by UK Land Estates. Site B consists of 175,000 sq.ft of Grade A airport related office accommodation in 6 individual buildings set in a landscaped park. 'Minded to grant' planning permission as at March 2010. (4)
		√		
Overall Assessment	Good	Average	Poor	Likely to come forward as part of the Airport's expansion plans when the market picks up. (4)
		√		

TOTAL SCORE	30
--------------------	----

(Scoring: 5 = best, 1 = worst)



Address : Rhodes Street			
Harvey Emms, (BA Hons), MRTPI, Director of Strategic Housing, Planning & Transportation Civic Centre, Barras Bridge, Newcastle upon Tyne, NE1 8PH. Tel. (0191) 2328520 Fax (0191) 2114998			
Scale: Not to Scale	Date: 24/08/2012	Drawn by: DBC	www.newcastle.gov.uk

**Newcastle Employment Land Review 2012
Individual Site Inspection Pro forma**

Site Reference & Address	4250: Rhodes Street			
Area (hectares)	1.15 ha			Comments
Current Use	Office	Industrial	Mixed	In use
	NA	NA	NA	
Undeveloped Land Status	Vacant – greenfield	Vacant – brownfield	Developed	Allocated in Walker Riverside Area Action Plan for employment
	√			
Undeveloped Land Availability	Short Term	Medium Term	Long Term	Available
		√		
Internal Environment	Good	Average	Poor	Existing business premise on site
External Environment	Good	Average	Poor	Commercial and industrial land adjacent
		√		
Road Access	Good	Average	Poor	via Rhodes Street/Station Road
		√		
Public Transport	Good	Average	Poor	Grade C
		√		
Market Attractiveness	Good	Average	Poor	Unlikely to come forward under current market conditions
		√		
Overall Assessment	Good	Average	Poor	Medium term site, likely to come forward on the back of Neptune Energy Park
		√		

TOTAL SCORE	31
--------------------	----

(Scoring: 5 = best, 1 = worst)

Appendix I - Summary of Potential Employment Site Scores

EMPLOYMENT LAND PORTFOLIO FOR SUBMISSION

As at January 2014

Ref	Site name & address	Location	Typology	Ownership	Availability for Employment Uses	Employment Land Site Status (Existing, Potential)	Site area (ha)	Likely use	Net Area (ha) Available for Employment Land	Basis of Floor Space Calculation or EP	B1, B2, B8 floor space potential sq.m.	Planning Status	Allocated Uses / Constraints	Present Land Use on Site	Details of Existing Premises	Neighbouring Land Uses	GP or PDL	Site Topography	Site Constraints	RMD	Regeneration / Frictionless: Regeneration Growth Area	Sequential Test Required	Utilities Capacity Issues	Land Stability	Proximity to Incompatible Uses: Air Quality, Noise / Vibration	Access	Proximity to Strategic Road Network	Public Transport Accessibility	Proximity to local services	Marketing Details (has marketing plan for site or employment uses)	Market Attractiveness	Deliverability (Viability / Potential) / Potential (range of uses etc)	Employment Land Site Status (Existing, Potential)	Total Ranking (out of 49)	Conclusion	
1400	Stephenson Quarter	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Predominantly Council owned	Application progressed for development. Land assembly required.	Existing with redevelopment potential	4.13	Offices	1.00	Design	40,000	20090520/01/DET and 2011177101/DET	CA 1	The site comprises a number of parcels of land which are in the main vacant and unused. There are various workshops and offices. A number of the historic buildings are Grade II listed and date from the early 1800s. Royal Mail currently occupies the depot and a new office building is to the north east of the site.	Royal Mail currently occupies the depot and a new office building is to the north east of the site.	East - B1 offices, north and west Railway Station and sidings.	PDL	No obstacles	Significant conservation issues.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No. City Centre	No. Sequential test required.	No. Obstacles.	No. Obstacles.	Noise / vibration from A167(M) and the A169.	Via Forth Street.	Close proximity to both the A167(M) and the A169.	Public Transport Accessibility: Grade A+	Less than 500m away	No	First phase expected to start late 2013.	Potential to improve east west connectivity. Part of the A22.	Development will significantly improve the area surrounding Central Station and help unlock sites to the West including Forth Street.	27	The site is part of the Accelerated Development Zone (ADZ) and will come forward with a significant element of Grade A office space.
1412	Man Fomer Brewery Site (Science Central)	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	NCC on behalf of Science Central Partnership - NCC, One North East and Newcastle University	Available	Allocated.	7.83	Offices	2.25	Design	81,950	20091116/01/DET	ED3.1	Cleared site.	Cleared site.	B1, some B2, Westgate Hill residential area to the south/west.	PDL	No obstacles	Contamination - mitigation will enable. Air quality.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Noise / vibration from A169. Air quality.	Via Wellington Street/James Boulevard and new east/west link	Adjacent to A169	Public Transport Accessibility: Grade A+	City Centre	No	The development period of Science City is 15 years with an assumed office take-up rate equating to 4,645 sq.m. per annum. Science City could account for between 1/3 to 1/4 of City Centre Grade A office space.	Part of ADZ	Environmental improvements. Sustainable location. Creating linkages with universities. Knowledge based industries.	38	This strategic site will come forward for mixed use with an element of employment use.		
3077	Haber Street and Brewery Offices	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Private Ownership	Available	Allocated.	0.78	Offices	0.39	Calculator	11700	No relevant planning history.	ED3.1	The site is located to the south of the former brewery and is currently in multiple occupancy.	Includes listed church, National Times and Heaton's yard. Previous works and yard has been cleared for development.	Many mixed commercial or cleared sites.	PDL	No obstacles	Possible contamination. Air quality & noise issues. Mitigation would enable.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Noise / vibration from the A169	Via Wellington Street/James Boulevard. Concerns over adequacy given level of development on the site.	Via the A169	Public Transport Accessibility: Grade A+	City Centre	No	Likely to come forward on the back of Science Central.	Part of ADZ	Highly accessible location which will reduce the need to travel.	35	Site will benefit from the proximity to Science Central and may not come forward for employment.		
1313	East Pligmin Street	City Centre	Other Urban Core Broadfield Mixed Use	Mixed Ownership	Available in part	Potential	17	Retail led mixed use	3.00	Design	78000	No relevant planning history.	CA 1 T3.4 T3.2 ED3.1 T1.4 T1.5 T3.3	Mixed use	Retail / Offices / Commercial	Housing - to the north and west. Education to the north / east.	PDL	No obstacles	Listed Buildings, noise, air quality, no. of properties to clear	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	No. Obstacles.	Will be from various streets including John Dobson Street and Market Street.	Very close proximity to the strategic road network.	Public Transport Accessibility: Grade A+	City Centre	No	Likely to be viable for a mixed use scheme.	Part of ADZ. Interventions required include land assembly and public sector funding.	Environmental improvements.	27	Retail led regeneration scheme to include a significant element of B1 floorspace.		
1328	Strawberry Place	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Council Owned	Available.	Potential	0.63	Offices	0.63	Design	13230	20092246/01/DET	ED2.2 CA 1	Vacant land used as surface parking. DTZ board advertising office development.	N/A	Predominantly offices and commercial uses.	PDL	No obstacles.	No obstacles.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	No. Obstacles.	From north via Strawberry Place only restriction to southerly access due to Galwegate traffic management issues.	City Centre, highly accessible location.	Public Transport Accessibility: Grade A+	Less than 500m	Yes	Viability affected by the recession.	Developer requires substantial pre-lets for the site.	Highly accessible location which will reduce the need to travel.	36	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term.		
1331	St James Metro Station	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Private Ownership	Vacant site in use as a surface car park. Remainder of site is temporary use.	Potential	8.8	Offices	0.48	Calculator	18500	No relevant planning history.	ED2.2 CA 1	Vacant.	Vacant.	Many commercial (B1) and local shops.	PDL	Mitigation would enable.	Noise / vibration from Metro line, possible contamination and air quality issues.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test is required.	No. Obstacles.	Noise from adjacent Metro.	From the north via Strawberry Place. Site adjacent to main junction at the head of St James Boulevard.	Public Transport Accessibility: Grade A+	City Centre	No	Viability affected by the recession.	Likely to be brought forward by the private sector when the market returns.	Highly accessible location which will reduce the need to travel.	31	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term.			
4329 & 4330	NCC Coach Park & WH Smith Depot	City Centre	Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	NCC (Bethesda), McKee & Rushe (Bethesda)	Available in part.	Existing with redevelopment potential	0.78	Offices	0.39	Calculator	5250	No relevant planning history.	CA 1 CA 2	Depot allocated under ED3.1 of the UDP in 2004.	Partially vacant. Deposited 4,200 sq.m. in temporary use, coach park 1,200 sq.m.	Mainly commercial and highways. Newcastle College to the north.	PDL	No obstacles.	No overlying physical or policy constraints to employment uses.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	No sequential test is required.	No. Obstacles.	Noise / air quality.	Via Railway Street. Access not possible to Scotswood Road.	Highly accessible location, good links to strategic road network.	Public Transport Accessibility: Grade A+	City Centre	No	Recognised as a key site with the 4th Ward Masterplan Vision.	Site lies to the northern edge of the 4th Ward area and could be developed on its own.	Highly accessible location which will reduce the need to travel.	29	The 4th Ward Study indicates that the wider area of Forth Yard is capable of accommodating up to 186,000 sq.m (2,200,000 sq.ft) of office space. The site has the potential to come forward with an element of office space.		
1076	Plot 12 Quayside	City Centre	Other Urban Core Broadfield Mixed Use	Private Ownership	Landowner not expected to bring site forward in current market conditions	Potential	0.57	Offices	0.29	Calculator	8700	20020921/01/DET	White land adjacent to the river.	Cleared site.	Commercial B1 office space.	B1	Northwestern section is a steep grassy incline.	Mitigation would enable.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Surrounded by commercial B1 uses.	Via Quayside.	Close proximity to A166	Public Transport Accessibility: Grade A+	Less than 500m away	Yes	The site occupies a prominent location, with excellent views overlooking the Quayside. Site marketing is underway.	Likely to come forward when occupiers have been secured.	Sustainable location, which reduces the need to travel and could potentially improve the environment.	34	Anticipated that the site will be taken up when the market returns, given its location in the urban core and the local success of similar schemes.			
1374	Forth Goods Yard	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Private Ownership	Remaining operational and in the short term, however redevelopment is being considered in the longer term, taking into account operational requirements of Central Station.	Existing with redevelopment potential	2.77	Offices	1.35	Calculator	41400	No relevant planning history.	ED4 ED4.1	Many disused vacant site, though some railway maintenance is site and operational.	Surrounding uses a mixture of commercial and vacant / underused sites and premises.	Railway line	PDL	Fair but at a height - due to the Type Gorge. Retaining walls to Skirnewood Road.	Proposed site contamination issue, major access to the site.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	Part of the site lies within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Mitigation would enable.	Convulsed site adjacent to railway. Access not possible to southerly access due to Galwegate traffic management issues.	Close proximity to the A169.	Public Transport Accessibility: Grade A+	City Centre	No	Part of Forth Yard area, previously identified as the preferred site for conference centre along with the site to the south (1366). Without Dixon Developments currently developing new Police Station.	In order to gain consent for network closure in order to bring forward the site, the site will need to be developed in conjunction with the Police Station. Infrastructure improvements required.	Potential environmental improvements.	24	The 4th Ward Study identifies the site as being capable of accommodating up to 186,000 sq.m (2,200,000 sq.ft) of office space. The site has the potential to come forward with an element of office space.		
1384	Salisbury (Former Hemm's Garage)	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Private Ownership	Available.	Existing with redevelopment potential	0.68	Offices	0.34	Calculator	10200	No relevant planning history.	EM ED4.1 ED2.2	Storage facility.	Railway yards, multi storey car park to the west.	Railway yards, multi storey car park to the west.	PDL	Mitigation would enable.	Possible contamination due to historic uses. Noise / vibration issues due to close proximity of railway. Adjacent Listed Building.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Noise / vibration from the adjacent railway.	Via Railway Street. Weight restrictions apply.	Close proximity to the A169.	Public Transport Accessibility: Grade A+	City Centre	No	Anticipated that the site will come forward as part of the comprehensive redevelopment of the Forth Yard area.	Infrastructure and land assembly required.	Environmental improvements	25	Long term and uncertain site. May not come forward for employment uses. Constrained by viability and land assembly in the short term.		
1388	South of Pottery Lane	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Mixed NCC. Stavros Property. Ormville Limited and The Site Casualty Limited.	Landowner has submitted site for consideration for mixed use development as part of SHLAA call-out.	Existing with redevelopment potential	3.15	Offices	1.50	Calculator	45,000	No relevant planning history.	ED4.1 CA 1 B2/B8	Vacant/derelict site, includes former PC depot and overnight car park for the Area.	Vacant/derelict site, includes former PC depot and overnight car park for the Area.	Newcastle Radio Arena / Caldera / Ceresa Conservation Area.	PDL	Falls away at southern extremity. Mitigation would enable.	Possible contamination. Mitigation would enable. Adjacent to Listed Building and Conservation Area.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Potential land stability issues. Mitigation would enable.	Uncontaminated, but potential for contamination from the adjacent Quayside area.	Close proximity to the A169.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Aspirations for a high quality extension of Newcastle City Centre. Principle of locating a casino within the 4th Ward site agreed by the Council.	Land assembly required. Development unlikely to be viable under current market conditions. May come forward for non-employment uses.	Environmental improvements	27	Could come forward for employment led, mixed use development in the longer term.		
4509	Newcastle City Helipad	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP-Sites with significant employment potential	Private: Eagle Helicopters	Available.	Potential	2.31	Mixed use could include office uses	0.77	Calculator	23,100	No relevant planning history.	ED4.1 CA 1	Operational helipad.	Helipad	Gas holder	PDL	Fair but at a height - due to the Type Gorge. Retaining walls to Skirnewood Road.	Gas holder which also includes red and green zones - see http://www.gas.gov.uk/infocentre/planningadvice.pdf for zones and uses.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	No sequential test required.	No. Obstacles.	Blaze zone from gas holder.	Height restrictions apply. Skirnewood Road partly laid out with bridge connection.	Close proximity to the A169.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Landowner submitted site for consideration for housing as part of SHLAA call-out.	Infrastructure improvements would be required to facilitate development. Site discounted as unsuitable for the SHLAA.	Potential environmental improvements.	22	Site is unsuitable for housing, and the potential for employment uses is limited by proximity to the gas holder.		
5230	Lower Slenbergs Yard	City Centre/Quayside	Quayside Regeneration Area. Urban Core Broadfield Mixed Use	NCC	Identified in the 1NG Phase 1 Quayside Development Framework to come forward	Existing with redevelopment potential	0.31	Offices & Residential	0.10	Calculator	2040	No relevant planning history.	ED4.1 CA 1 D2/ NCL5 NCL 6	Vacant, partially cleared site.	Old warehouses	Commercial - land to the south includes Hobbs Road and Toffee Factory	PDL	Mitigation would enable.	Severely contaminated. 1NG commissioning remediation and decontamination works. Site is within EA Flood Zone 3.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	Mitigation would enable.	Noise / vibration from the City Road.	Close proximity to the A166.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Identified in the 1NG Phase 1 Quayside and East Quayside Development Framework to come forward for commercial and residential use.	Likely to be brought forward by the private sector with public sector assistance.	Potential environmental improvements	35	High demand anticipated as part of the wider regeneration of the Quayside. Likely to come forward for mixed use office/residential		
3064	Mailing Street	City Centre	Quayside Regeneration Area. Urban Core Broadfield Mixed Use	NCC	Available	Potential	0.3	Offices	0.15	Design	2032	No relevant planning history.	ED4.1 CA 1 NCL5 NCL 6	B2 use on southern boundary.	Cleared site to the west, open space to the east, industrial to the north.	Cleared site to the west, open space to the east, industrial to the north.	PDL	No obstacles.	Contamination: site assembly, conservation issues. Remediation works, listed by B2 and B8.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	No. Obstacles.	Via Ford Street.	Close proximity to strategic road network.	Public Transport Accessibility: Grade A	Edge of City Centre	No	High demand anticipated as part of the wider regeneration of the area.	Likely to be brought forward by the private sector with public sector assistance.	Highly accessible location which will reduce the need to travel.	34	2,032 sq.m of B1 floorspace proposed as part of Phase 1 of the Quayside and East Quayside Development Framework.		
5234	Walker Riverside North (Napene Energy Park Phase 3)	East	Walker Riverside General Employment Land and Napene Energy Park	Upper half of the site is under North Tyndes's ownership. Lower half is NCC and let on a 99 year lease from 1985.	Available	Allocated / UDP / WRAP / Napene Energy Park LDO	5.59	General	5.59	EP	26,544	Local Development Order in place	ED3.1 ED4.1 ED4.1 LDO	Vacant former dry docks and drydock temporary site for works associated with Tyne Tunnel.	Residential and B2	Residential to the north and Shields Road to the south.	PDL	Site is on two main levels. The lower level is steep ground and could only be used for light manufacturing.	Close proximity to industrial. EA Flood Zone 3. Contamination likely.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	Adjacent B2 land used.	Via Old Mill Road / Benton Way.	Close proximity to the A169.	Public Transport Accessibility: Grade C	Circle 750m	No	Anticipated to come forward on the back of Napene Energy Park.	Likely to be brought forward by the private sector with public sector assistance.	The site would provide 29 job opportunities within a low SOA area.	29	Site requires remediation and archaeological investigation works first. The site is on two levels - the upper level will come forward first for an extreme engineering building associated with offshore technologies (use class B1 research and development). The lower level will be a light weight industrial building (use class B1a/cb1a)		
4438	Dobson's Yard, Wintoncote Road	East	Walker Riverside General Employment Land and Napene Energy Park	Council Owned	Available	Allocated / UDP / WRAP	0.85	General	0.85	EP	3750	No relevant planning history.	ED3.1 ED4.1 ED4.1	Vacant / derelict site.	N/A	B2 land uses.	PDL	Sloping but mitigation would enable.	Contaminated, landlocked site, issues with quality and access to the eastern extremity. EA Flood Zone 3.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	Mitigation would enable.	Via Wintoncote Road.	Close proximity to Walker Road (A169)	Public Transport Accessibility: Grade C	c. 1km	No	Site offers opportunities for expansion of offshore oil and gas activity.	Issues around contamination and land stability. Heavy demands over the viability of bringing the site forward. Funding could come from LTP, Single Programme, ring fenced funding and possible private finance.	Development of the site will provide job opportunities within the SOA.	20	Needs significant ground works / investment. Likely to come forward until the Napene Energy Park has been developed.		
ED3.1 (32)	Siemens, Shields Road North 3210	East	Other Urban General Employment Land	Council owned	Available	Allocated / UDP / ED3.1	3.23	General	3.23	HCA	13566	No relevant planning history.	ED4.1 CA 1	Cleared site.	Cleared site.	Industrial estate.	PDL	No obstacles.	Metro line to the northern boundary.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	No. Obstacles.	Metro line	Junction improvements required to facilitate development.	Close proximity to the Coast Road and Central Motorway.	Public Transport Accessibility: Grade A+	Less than 500m away	No	Council owned.	Likely to come forward under current market conditions.	Unlikely to come forward under current market conditions.	28	Suitable for employment use.	
ED3.1 (30)	Siemens, Shields Road South 3062	East	Other Urban General Employment Land	Council Owned	Available.	Allocated.	8.41	General	6.41	HCA	27000	No relevant planning history.	ED4.1 CA 1	Cleared site.	Not applicable.	Residential to the south/west boundary.	GP	No obstacles.	Green Belt	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	No. Obstacles.	Adjacent A1 & B2 uses. Railway line.	Close proximity to the Coast Road and Central Motorway.	Public Transport Accessibility: Grade A+	c.750 m to Shields Road local centre.	No	Unlikely to come forward under current market conditions, without intervention.	Public sector intervention required.	Job opportunities within deprived communities.	25	Suitable for employment use.		
4576	C Parsons Works Shields Road	East	Other Urban General Employment Land	Council Owned	Available	Allocated	2.05	General	2.05	Design	8665	20072669/01/DET	ED3.1	Cleared site	The site is situated between the East Coast Main Line to the north and Shields Road to the south. The wider area around the site is rural.	Not applicable.	PDL	No obstacles.	Potential archaeological interest. An assessment of contamination risk would have to be undertaken.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Growth Area.	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	Adjacent to East Coast Main Line & Metro Line	Accessibility, servicing and circulation would have to be improved by the road realignment.	Close proximity to A169 providing access to the A167 (M) and to the regional road links including the A1 (M) and A19	Public Transport Accessibility: Grade A	No	Site is likely to come forward in the short term	Viable without intervention when market improves.	Job opportunities within deprived communities.	35	Suitable for employment use.			
5233	Shepherds Offshore land on former Napene Yard off Fisher Street	East	Walker Riverside General Employment Land and Napene Energy Park	Council Owned	Available	Allocated	1.67	B2/B8	1.67	Design	2237	20120971/01/DET	ED3.1	Cleared site	Not applicable.	The site is bounded by the extension of the Main Line to the north and Shields Road to the south. The western and northern edges of the site have been previously planned with a row of oak trees	PDL	The site slopes from west to east towards the River Tyne.	EA Flood Zone 3. The site could be developed subject to EA conditions.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site lies within a Strategic Area of Change.	Only for proposals not in accordance with LDO	No. Obstacles.	The riverside walls have been reinforced with piles to tolerate a heavy load buoy	No. Obstacles.	Newly created access from Fisher Street which has a nearby link access to Wintoncote Road/Walker Road	Public Transport Accessibility: Grade C	Yes	Planning permission has been secured for an industrial unit - site is likely to come forward in the short term	Likely to be brought forward by the private sector with public sector assistance.	Job opportunities within deprived communities.	34	Suitable for employment use.			
5234	Land at former Napene Yard	East	Walker Riverside General Employment Land and Napene Energy Park (Phase 2)	Council Owned	Available	Allocated	2.1	B2/B8	2.10	Design	4432	20120930/01/DET	ED3.1	Cleared site	Not applicable.	Residential, to the western boundary.	PDL	Site is on two main levels	EA Flood Zone 3. This part of Napene Yard site is mostly built up within the Roman walls surrounding Segesburum Fort.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site lies within a Strategic Area of Change	Only for proposals not in accordance with LDO	No. Obstacles.	The riverside walls have been reinforced with piles to tolerate a heavy load buoy	Via Old Mill Road	Walker Road (A169) provides access to the A167 (M) and to the regional road links including the A19/Tyne Tunnel	Public Transport Accessibility: Grade C	Yes	Planning permission has been secured for a production facility - site is likely to come forward in the short term	Likely to be brought forward by the private sector with public sector assistance.	Job opportunities within deprived communities.	34	Suitable for employment use.			
4721	Wellstream Wood Yard, Wintoncote Road	East	Walker Riverside General Employment Land	NCC & Wellstream	Available	Allocated	1.77	B2/B8	1.77	Design	2826	20091808/01/DET	ED3.1	Cleared site	Not applicable.	This part of Walker Riverside is dominated by two production companies. To the west and south is Walker Riverside park incorporating pedestrian and cycle routes.	PDL	No obstacles.	EA Flood Zone 3. Issues around contamination: the site would be subject to a decontamination scheme. Site is within an area of local conservation interest known locally as 'Butterfly Walk' and designated as a	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England.	The site is located within a Strategic Growth Area	Yes - Sequential test would be required for offices and other town centre uses.	No. Obstacles.	Adjacent B2 uses - not consent.	Accessibility, servicing and circulation would have to be improved by the road realignment.	Close proximity to Wintoncote Road only	Public Transport Accessibility: Grade D	No	Likely to be brought forward by the private sector with public sector assistance.	Job opportunities within deprived communities.	34	Suitable for employment use.				

EMPLOYMENT LAND PORTFOLIO FOR SUBMISSION

As at January 2014

Table with columns: Ref, Site name & address, Location, Typology, Ownership, Availability for Employment Uses, Employment Land Site status (Allocated/Potential), Site area (ha), Likely use, Net Area (ha) Available for Employment Land, Basis of Floor Space Calculation (Calculator/EP), B1, B2, B9 floor space potential sq.m., Planning Status, Allocated Uses / Constraints, Present Land Use on Site, Details of Existing Premises, Neighbouring Land Uses, G1 or PDL, Site Topography, Site Constraints, IMD, Regeneration Potential: Regeneration Growth Area, Sequential Test Required, Unlike Capacity Issues, Land Stability, Proximity to Incompatible Uses, Access, Proximity to Strategic Road Network, Public Transport Accessibility, Proximity to local services, Marking Details (has no marking of the site for employment uses), Market Attractiveness, Deliverability (Viability / Infrastructure / Public Sector / Other), and Conclusion.



EMPLOYMENT LAND PORTFOLIO FOR SUBMISSION

As at January 2014

Ref	Site name & address	Location	Typology	Ownership	Availability for Employment Uses	Employment Land Site Status (Existing Potential)	Site area (ha)	Likely use	Net Area (ha) Available for Employment Land	Basis of Floor Space Calculation or GP	B1, B2, B8 floor space potential sq.m.	Planning Status	Allocated Uses / Constraints	Present Land Use on Site	Details of Existing Premises	Neighbouring Land Uses	GF or PDL	Site Topography	Site Constraints	IMD	Regeneration Priorities: Regeneration Growth Area	Sequential Test Required	Utilities Capacity Issues	Land Stability	Proximity to Incompatible Uses: Air Quality, Noise, Flood	Access	Proximity to Strategic Road Network	Public Transport Accessibility	Proximity to local services	Marking Details (has existing planning for the site or employment uses)	Market Attractiveness	Deliverability (Viability / required public sector / land assembly, viable range of uses etc)	Local authority / other stakeholders / community / business / job opportunities within 1km	Total Ranking (out of 6)	Conclusion
4677	Lerrington Almshouses	Outer West	Other Urban General Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission	Potential	1.79	B1/B2/B8	1.79	HCA	7685	No relevant planning history.	Allocated as open spaces.	Moment gardens.	Aliment gardens	Residential to the south, east and west boundaries.	PDL	No obstacles	Green Belt	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	N/A	Via Quarry Road	Public Transport Accessibility: Grade D	Less than 500m away	No, but the site was submitted as part of the 'fall out' process for the Employment Land Review and Strategic Housing Land Availability.	Greenfield site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	21	The site is located within the Green Belt and is therefore located on policy grounds.	
4671	Newburn Grange Farm	Outer West	Other Urban General Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission	Potential	44.62	B1/B2/B8	44.62	HCA	187000	No relevant planning history.	Allocated as Green Belt.	Agricultural	Agricultural	Agricultural with residential development to the north.	GF	No obstacles	No obstacles.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via Grange Road	Public Transport Accessibility: Grade D	Less than 500m away	Greenfield site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	20	The site is located within the Green Belt and is therefore located on policy grounds.			
4813	Fell House Farm	Outer West	Other Urban General Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission	Potential	158.15	B1/B2/B8	80.00	HCA	33000	No relevant planning history.	Green Belt	Agricultural	Agricultural	Residential to eastern boundary.	GF	No obstacles	Green Belt, overriding constraint.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	Mitigation would be required.	No obstacles.	No obstacles.	Unconstrained.	Via the A189	Public Transport Accessibility: Grade C	c.500m	No, but the site was submitted as part of the 'fall out' process for the Employment Land Review and Strategic Housing Land Availability.	Greenfield site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	20	The site is located within the Green Belt and is therefore located on policy grounds.
4688	Whorlton Farm	Outer West	Other Urban General Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission	Potential	118.71	B1/B2/B8	58.00	HCA	243000	No relevant planning history.	Allocated as Green Belt.	Agricultural	Agricultural	Residential abuts southern boundary.	GF	No obstacles	No obstacles.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	Mitigation would be required.	No obstacles.	Northern boundary abuts strategic road network. Mitigation would be required.	Unconstrained.	Via the A189	Public Transport Accessibility: Grade D	Less than 500m	No, but the site was submitted as part of the 'fall out' process for the Employment Land Review and Strategic Housing Land Availability.	Greenfield site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Environmental improvements	20	The site is located within the Green Belt and is therefore located on policy grounds.
4673	Widdale Colliery Farm 2	Outer West	Other Urban General Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission	Potential	35.1	B1/B2/B8	35.10	HCA	147000	No relevant planning history.	Green Belt	Agricultural	Agricultural	Agricultural.	PDL	No obstacles	Green Belt	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Unconstrained.	Close proximity to A66	Public Transport Accessibility: Grade D	c.750m	No, but the site was submitted as part of the 'fall out' process for the Employment Land Review and Strategic Housing Land Availability.	Greenfield site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	21	The site is located within the Green Belt and is therefore located on policy grounds.	
1684	Northwick Union & Wesley's House	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP - Sites with significant employment potential	HCA / Constrained - Part of the site (the former Northwick Union building) was transferred to the HCA as part of the asset transfer from One NorthEast	Available in part	Existing with redevelopment potential	0.24	Offices	0.12	Calculator	3000	2007/288/01/DEY - Detailed planning consent is in place for an office (B1) scheme with ancillary ground floor retail leisure space.	ES 4	B1	Westgate House was demolished in 2008. The former Northwick Union building is currently vacant and being actively marketed.	Listed Union rooms to the west (currently used as a Public House). Pudding Churn which consists of office or drinking food venue. 6 storey residential block to the west listed Colliery buildings (2376) to the east. Listed Central Station and Station House are opposite the site.	PDL	No obstacles	Air quality improvement - Core constraints to development include sub station on site. Design and construction of future scheme needs to account for Grade II Listed building which adjoins site.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	No sequential test required	No obstacles.	Air quality improvement area.	Via Collingwood Street.	Public Transport Accessibility: Grade A	City Centre	Yes	Prominent site in the heart of the City Centre, opposite Central Station. Potential use (C1) use with ground floor ancillary leisure / retail.	Could come forward when occupiers have been secured.	City Centre highly accessible location.	30	Discouraged - Owner is pursuing other use. Site is too small for inclusion within ELR.		
3079	Pin Street Site	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP - Sites with significant employment potential	Council Owned	Available, subject to planning consent being secured.	Potential	0.37	Mixed use	0.19	Calculator	9500	No relevant planning history.	White Land	Residential	Existing block of 3 blocks for short stay / homeless. This facility is due to relocate to better served facilities.	Cleaned alley, football stadium, B1, student housing and property issues in the future.	PDL	No obstacles	Slopes from west to east. About 1411, creating opportunities to link developments.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	No sequential test required	No obstacles.	Mitigation would be required.	Noise, adjacent to the emerging Science Centre.	Via Pin Street.	Public Transport Accessibility: Grade A	City Centre	No	Likely to be brought forward for student accommodation	The site is ideally placed between Science Central and Newcastle University and could be suited to a range of uses, notably student accommodation.	Environmental improvements	33	Site is to come forward for student accommodation.	
4332	Skinnerston Road A	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP - Sites with significant employment potential	NCC & Hampstead Way / Aghb	Landowner seeking to redevelop	Existing with redevelopment potential	0.21	Mixed use	0.11	Calculator	3300	No relevant planning history.	CA C4 C1	Vacant, commercial (B2)	Remains of previous storage, depot and office use on site.	Helpport, and Forth Yard	PDL	No obstacles	Ground contamination. Previous industrial uses including oil storage facility. Site of archaeological interest and potential flood risk.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	No sequential test required	No obstacles.	No obstacles.	Helpport	Via Skinnerston Road A189	Public Transport Accessibility: Grade B	c.500m	No	Historic enquiries for B1 development, unlikely to come forward in the current climate. Questionable as to whether this is an office location.	Public sector funding likely to be required to bring the site forward.	Job opportunities within deprived communities.	23	Discouraged - Family isolated and peripheral to the city centre. Site below threshold.	
4331	Skinnerston Road B	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP - Sites with significant employment potential	NCC & Hampstead Way / Aghb	Recent developer interest in bringing site forward for mixed use but no Council resolution to dispo.	Existing with redevelopment potential	0.21	Mixed use	0.11	Calculator	3300	2000/1829/01/RES	Adjacent to gas holder and railway line.	Remains of previous storage, depot and office use on site.	Helpport, and Forth Yard.	PDL	No obstacles	Ground contamination. Previous industrial uses including oil storage facility. Site of archaeological interest and potential flood risk.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	No sequential test required	No obstacles.	No obstacles.	Helpport	Via Skinnerston Road A189	Public Transport Accessibility: Grade B	c.500m	No	Historic enquiries for B1 development, unlikely to come forward in the current climate. Questionable as to whether this is an office location.	Public sector funding likely to be required to bring the site forward.	Job opportunities within deprived communities.	23	Discouraged - Family isolated and peripheral to the city centre. Site below threshold.		
4647	Newcastle Arena	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP - Sites with significant employment potential	Private: SMG Europe (American Capital)	Not available.	Potential	3.65	Arena / Offices	1.83	Calculator	54750	No relevant planning history.	Adjacent to gas holder and railway line. Wildlife corridor runs parallel to the eastern boundary.	Arena and car parking.	Arena	Railway / industrial to the north, industrial to the east and west.	PDL	Level site of raised platform above.	Adjacent to former Helpport.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area.	No sequential test required	No obstacles.	No obstacles.	Noise / vibration from Helpport road / rail network.	Via Redheugh Bridge by the east and Dumfries Street to the west. Both have headroom losses / connecting the water strategic highway network.	Very close proximity to the A169.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Previously proposed / aspirations included a potential regional casino and scope to upgrade to a 10,000 seater stadium. The site should be removed from the database as there is a likelihood of the site coming forward for employment uses.	Redevelopment of the arena is the most viable.	Redevelopment of the arena is the most viable.	22	Previous proposals / aspirations include a regional casino and scope to upgrade to a 10,000 seater stadium. The site should be removed from the database as there is a likelihood of the site coming forward for employment uses.
1982	F17 Lime Street	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private	Landowner has acquired planning permission for housing and mixed use but may not bring site forward in current market conditions	Potential	0.16	Mixed use	0.08	Design	460	2006/1241/07/DET	ED4 T CA 1	B2	Vacant, former garage premises.	Vacant B1/B8 land uses.	PDL	Site lies at the foot of a steep bank.	Land stability.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Mitigation would be required.	No obstacles.	Via Lime Street.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Likely to come forward in the short term due to current market conditions.	Landowner not expecting to bring the site forward until market conditions improve.	Development of the site could provide job opportunities within a deprived community.	25	Discouraged - The site is too small for inclusion within the ELR.	
1978	Former Ice Factory, Melling Street	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private Ownership	Building on site to be demolished.	Potential	0.37	Mixed use	0.19	Calculator	2775	2005/1941/01/DET	ED4 L NC1.5 NC1.6	B2/B8	Commercial timber storage, depot and office space.	Predominantly B1/B8	PDL	No obstacles	Contamination / improvements required to quay wall.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	Land stability issues - mitigation would be required.	B2/B8 uses.	Via Ford Street.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Identified in the IM2 Phase 1 Quasium and East Quayside Development Framework as the East Bank. To come forward for residential and commercial uses. The former Ice Factory located on Quay Timber will be a permanent block providing workspace for live work units.	Improvements required to Quay wall. Site could come forward for a range of uses including B1/B2 and residential.	Potential environmental improvements.	31	Discouraged - It is anticipated that the site will come forward for residential and commercial uses, as such the site is discounted for employment use.		
2006	Stephen Easton/Kelly Park	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private	Available.	Potential	0.14	Mixed use	0.14	Calculator	840	2010/0351/01/DET	ED4 T CA 1 OS2	B2/B8	Former builders depot and offices.	Vacant land to the south, open space to the north and east.	PDL	No obstacles	Conservation areas, setting of listed building	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	Land stability issues - mitigation would be required.	Noise / vibration from overhead road and rail network.	Via Foundry Lane.	Public Transport Accessibility: Grade A	Edge of City Centre	Site marketed (not for sale)	Proposed residential scheme by Byker Bridge (RELI) for the erection of 42 flats in a 1 x 3 storey block and a 1 x 5 storey block with roof garden and associated uses	De-risking works required.	Potential environmental improvements.	29	Discouraged - Site likely to come forward for housing and site too small for inclusion within Employment Land Review.		
4285	Spillers Mill, Quasium	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Council Owned	Landowner has previously sought residential development (IM2) interest.	Allocated.	1.98	Mixed use	1.50	N/A	0	No relevant planning history.	ED3 T 2 OS 1	Vacant	Site of vacant four mill and offices will need to be demolished	Principally commercial.	PDL	No obstacles	Contamination likely.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area.	No sequential test required	No obstacles.	No overriding constraints.	St Lawrence Road / Quasium	Public Transport Accessibility: Grade A	Edge of City Centre	No	Site is suitable for housing / employment / leisure but demolition of existing buildings likely to impose very high, abnormal costs	Site is being brought forward for IM2.	Environmental improvements. Access to leisure / community facilities within deprived communities.	33	Discouraged - IM2 has indicated this site will come forward for residential and commercial uses. The site should be removed from the database as there is a likelihood of the site coming forward for employment uses.		
4289	Quay Timber Site	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private: IM2	City Development Company, IM2 interested in acquiring site for housing led mixed use development	Existing	0.24	Mixed use	0.24	Calculator	1440	No relevant planning history.	ED4 T CA 1 NC1.5 NC1.6	B2	Commercial timber storage, depot and office space.	Predominantly B1/B8	PDL	No obstacles	Contamination likely.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Adjacent to B2/B8 uses.	Via Ford Street.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Identified in the IM2 Phase 1 Quasium and East Quayside Development Framework as the East Bank. The site of Quay Timber has been identified for 'live-work' units.	The site is being brought forward by IM2.	Proposed to bring job opportunities to this SOA area.	Discouraged - IM2 has indicated this site will come forward for live-work units and as such is discounted for employment use.		
4642	Pigeon Cores, Lime Street	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private	Site to be retained. Sub-house and cores to Lime Quay.	Existing	0.08	Mixed use	0.08	Calculator	360	No relevant planning history.	ED4 T	Pigeon cores	Building and associated cores.	Open space to the west, vacant land and redundant B2/B8 elsewhere.	PDL	Steep slope and retaining wall to the western boundary.	Ground conditions, land stability. Mitigation would be required.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	Not within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	Ground conditions - mitigation would be required.	No obstacles.	No obstacles.	Via Lime Street.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Small site, level changes make redevelopment difficult without land assembly (4748 Lime Street).	De-risking works required.	Potential social benefits from the development of the site.	22	Discouraged - Site too small for inclusion within Employment Land Review and is likely to come forward for housing.	
4643	Wires Products, Shields Road Industrial Estate	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Mixed Ownership	Not available.	Existing	0.25	Mixed use	0.25	1/25	1320	2008/1270/01/DET	ED3 L	Cleaved site	Former industrial site	Student accommodation, B2, church and residential.	PDL	No obstacles	No overriding physical or policy constraints to employment uses.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Adjacent B2 uses - not constrained.	Via Field Close / Clarence Street.	Public Transport Accessibility: Grade A	Adjacent to Shields Road / City Centre.	Planning permission has been secured for purpose built student accommodation and ground works have commenced on site.	Site is being brought forward by private sector.	Developer has indicated that they will employ up to 200 workers at its peak during 2015.	28	Discouraged - Site to come forward for purpose built student accommodation.		
4760	Land at junction of Byker Bank and Ford Street	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private Ownership	Not available.	Potential	0.1	Office	0.10	Calculator	600	No relevant planning history.	ED4 T	B2/B8	Industrial unit and warehouse. 10,000 sq.m. remains vacant.	Heavy industrial (B2). Scrap metals processing to the north and east.	PDL	Steep sloping site (Byker Bank) to south (Quasium Bank) remains vacant.	Red neighbour uses.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	Ground conditions - mitigation would be required.	No obstacles.	Adjacent to a soap yard	Via Ford Street.	Public Transport Accessibility: Grade A	Close proximity to Shields Road local centre & the City Centre.	Unlikely to be viable for redevelopment in the short to medium term	De-risking works required.	Redevelopment of the site could create job opportunities within deprived communities, a highly accessible location.	25	Discouraged - Small site constrained by bad neighbour uses and ground stability. Site below the minimum threshold for inclusion within the Employment Land Review.		
1110	Heavey's Land west of Hume Street (also known as East Bank)	Quasium	Quasium Regeneration Area, Urban Core Brownfield Mixed Use	Private and One North East	Not available.	Potential	0.31	Mixed use	0.15	Design	2250	No relevant planning history.	ED4 L NC1.1 NC1.5 NC1.6	Commercial B2	Warehouses and service area	B2	Sloping but mitigation would be required.	Contamination, improvements required to quay wall. Mitigation would be required.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Land stability issues - mitigation would be required.	Via Ford Street.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Identified in the IM2 Phase 1 Quasium and East Quayside Development Framework as the East Bank. To come forward for residential and commercial uses. Heavey's will be brought forward in the short term.	Site is being brought forward by IM2 for residential use. Remediation work required.	Environmental improvements.	30	Discouraged - East Bank is one of three national public sector sites to be brought forward under the Public Sector Business Land Initiative. The likelihood is that the site will not come forward for commercial use, and as such the site is discounted from the Employment Land Review.			
3022	Pheny Street West	City Centre	Other Urban Core Brownfield Mixed Use	Private and NCC	Available	Potential	0.6	Mixed use	0.60	Calculator	18000	No relevant planning history.	C3 T34 ED2 C CA 1	Mixed use	Existing surface car park and Pheny Street (mix of Public Housing). 1-2 story shops / commercial units.	To the north and west residential, to the north east - education.	PDL	Slopes from west to east towards Pheny Street.	No obstacles.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area.	No sequential test required	No obstacles.	No obstacles.	Likely from Morden Street (to the rear of the site).	City Centre, highly accessible location.	Public Transport Accessibility: Grade A	City Centre	No	Not an obvious office site.	May be viable for mixed use.	Potential environmental improvements.	27	Discouraged - Likelihood is that the site will come forward for retail at ground floor level with residential above.	
1982	Scottwood Bridge Road	Inner West	Other Urban Core Brownfield Mixed Use	Mixed: Western part of the site is in Council ownership and the eastern part is in private ownership.	Business operates from eastern part of site.	Allocated	1.22	General	0.61	HCA	2882	No relevant planning history.	NC1.8 ED1.1 ED1.2 ED1.3 CA 1	Plant hire business operates from the eastern part of the site.	Protected open space and residential.	PDL	Steep slope towards Scottwood Road. Mitigation would be required.	IM2B1 corridor runs to the south of the site up towards Central Drive (listed Policy NC1.5 and NC1.6 of UDP). Western parcel of the site is identified as open space within the UDP protected by a Green Belt.	Site within an SOA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Potential land stability issues - mitigation would be required.	Noise / vibration from Scottwood Road.	Via Scottwood Road.	Public Transport Accessibility: Grade A	Close proximity to Scottwood Road.	No	Prominent site when viewed from Scottwood Road.	Small, irregular shaped site.	High site maximising location. Potential to provide new employment uses.	21	The likelihood is that the site will be redeveloped for employment uses.		
2646	Newcastle City Centre Park (NGP) Call C	North	Private Employment	Private: NGP Consortium	Not available.	Allocated	21.62	Housing	20.00	Calculator	120000	1999/1300/11/RES. Pre-application discussions for residential development are underway.	ED1 ED1.1 OS1.2 OS1.3 OS1.4 OS1.5 OS1.6	Greenfield site.	Greenfield	Adjacent to completed office development (4617) and future office development (2646).	GF	No obstacles.	No obstacles.	Site is not within an SOA which is within either the most 10% or 20% socially and economically deprived in England	Part of the site has been identified as suitable for housing.	No obstacles.	No obstacles.	Close proximity to report and the A1.	Via Brunton Lane / Budy Abbey Way.	Public Transport Accessibility: Grade A	Local centre proposed (as part of Great Park (1969/1300/01/DET)). Newcastle local shops are located at Kingston Park c. 1km away.	Yes by Knight Frank	Identified as a key strategic employment site, of national and regional importance. Ultimately, NGP is prepared to create over 10,000 jobs, attracting national and international companies to its regional location. Already home to software giant SAP, world headquarters, the NGP Business Park it offers flexible modern high quality design office spaces with units ranging from 3,000 to 100,000 sq ft available to buy or rent.	Visible without intervention from the public sector.	Opportunity to deliver high quality jobs.	Discouraged - Site is allocated for employment high quality jobs.			

EMPLOYMENT LAND PORTFOLIO FOR SUBMISSION

As at January 2014

Ref	Site name & address	Location	Typology	Ownership	Availability for Employment Uses	Employment Land Site Classification (Potential)	Site area (ha)	Leaky use	Net Area (ha) Available for Employment Land	Basis of Floor Space Calculation or GP	B1, B2, B8 floor space potential sq.m.	Planning Status	Allocated Uses / Constraints	Present Land Use on Site	Details of Existing Premises	Neighbouring Land Uses	GF or PDL	Site Topography	Site Constraints	IMD	Regeneration Priorities: Regeneration Growth Area	Sequential Test Required	Utilities Capacity Issues	Land Stability	Proximity to Incompatible Uses: (Nursery, Factory)	Access	Proximity to Strategic Road Network	Public Transport Accessibility	Proximity to local services	Marking Details (has marking details for the site for employment uses)	Market Attractiveness	Deliverability (Viability / required public sector involvement, job opportunities, viable range of uses etc)	Environment / Employment / Potential	Total Ranking (out of 6)	Conclusion
284	Newham Heath Advertisements	Outer West	Other Urban Employment Land	Private ownership. Council has previously tried to negotiate an acquisition but this has not been successful.	Available	Allocated	1.89	General	1.89	HCA	8000	No relevant planning history.	EDS.1 NCI.1 NCI.5 NCI.6	Vacant	Unknown, access to site could not be achieved.	Caravan storage park and vacant site.	PDL	Slope slope north west to south east. Mitigation would enable.	Adjacent to Lerrington Court (Grade 2* road).	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Mitigation would enable.	Adjacent B2 land uses.	Access to site is constrained.	Close proximity to Scotwood Road.	Public Transport Accessibility: Grade D	c 1km to local services	No	Potential for land assembly with 3360 and 3369.	Highways improvements would be required to facilitate development.	Potential environmental improvements.	22	Discount: Not a serious likelihood of industrial use and the site is unsuitable for offices. Site may be better suited to housing but there are viability issues.
330	Former Caravan Site	Outer West	Other Urban Employment Land	Council owned. Developer is about to be given 1 year exclusivity to put together a development for the site.	Available	Allocated	1.7	General	1.50	HCA	6300	No relevant planning history.	EDS.1 NCI.1 NCI.5 NCI.6	Vacant	Cleared site. Former gipsy and traveller site.	Adjacent to tarmac plant (B2). Site screened from residential by existing uses and topography.	PDL	Flat - no obstacle.	Wildlife Corridor runs through site to the east.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Adjacent to Tarmac plant.	Good via Riverside Way. Inaccessible from main road network and Land Rover access.	Close proximity to the A1 via Scotwood Road.	Public Transport Accessibility: Grade D	c 1km to local services	No	A developer is about to be given 1 year exclusivity to put together a development for the site. At the moment the development partner does not believe anything is viable, however if they can acquire an adjacent site (Newham Heath Advertisements) a development could be possible. Potential for land assembly with 2844 and 3308.	Highways improvements would be required to facilitate development.	Potential environmental improvements.	22	Low value for current use. Good location for B2 starter units but unlikely to come forward without land assembly with 3308 and 3309. Unlikely to be attractive to the market. Discount: not a serious likelihood of the site coming forward. Part of LDCP EDS 1 (N) allocations which is to be de-allocated as it is no longer TI for purpose.
489	Walbottle Colliery	Outer West	Other Urban Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission.	Potential	1.91	B1/B2/B8	1.91	HCA	7800	No relevant planning history.	Allocated as Green Belt.	Agricultural	NA	Residential to the north, west and south.	PDL	No obstacle.	Green Belt	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Mitigation would enable.	None evident.	Via Hawthorn Terrace.	Close proximity to the A69	Public Transport Accessibility: Grade D	Less than 500m away	No, but the site was submitted as part of the 'call out' process for the Employment Land Review and Strategic Housing Land Availability	Unreserved site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	21	The site is located within the Green Belt and is therefore located on policy grounds.
484	Hiving Farm, Newburn	Outer West	Other Urban Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission.	Potential	4.32	B1/B2/B8	6.32	HCA	26000	No relevant planning history.	Allocated as Green Belt.	Agricultural	N/A	Agricultural	GF	No obstacle.	None other than Green Belt allocation.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via A6985	Quite remote from strategic road network.	Public Transport Accessibility: Grade D	c 500m	No, but the site was submitted as part of the 'call out' process for the Employment Land Review and Strategic Housing Land Availability	Unreserved site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	20	The site is located within the Green Belt and is therefore located on policy grounds.	
482	Walbottle Colliery Phase 1	Outer West	Other Urban Employment Land	The Northumberland Estates	Available. Landowner has indicated that the site could come forward within 1 year of grant of planning permission.	Potential	17.76	B1/B2/B8	17.76	HCA	78000	No relevant planning history.	Allocated as Green Belt.	Agricultural	Agricultural	Agricultural & residential to the western boundary	GF	No obstacle.	Green Belt	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via Hawthorn Terrace.	Close proximity to the A69.	Public Transport Accessibility: Grade D	Less than 500m away	No, but the site was submitted as part of the 'call out' process for the Employment Land Review and Strategic Housing Land Availability	Unreserved site ready to develop. Infrastructure works required.	Site could be brought forward by the private sector. Site could be brought forward by the private sector.	Potential environmental improvements.	21	The site is located within the Green Belt and is therefore located on policy grounds.	
1411	Former brewery bottling plant	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP. Sites with significant employment potential	Not available.	Allocated.	0.8	Mixed use	0.30	Design	30,000	20081116/O/DET	EDS.1	Student accommodation blocks under construction.	Cleared site.	B1/B2 Westgate Hill residential area to the southwest.	PDL	No obstacle.	Air quality	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	No obstacles.	Noise / vibration from A169	Via Wellington Street/James Boulevard. Concerns over adequacy given likely scale of development on the site.	Via the A169	Public Transport Accessibility: Grade A+	City Centre	No	The development period of Science City is 15 years with an assumed office take-up rate equating to 4,645 sq.m. per annum. Science City could account for between 1/3 to 1/4 of City Centre Grade A office space.	Public sector funding	Environmental improvements. Sustainable location. Creating images with universities. Knowledge based industries.	38	This strategic site will come forward for mixed use, area previously assumed to be employment has been taken up by student accommodation.	
4282	CWS Engineering Depot	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP. Sites with significant employment potential	Private	Available	Existing with redevelopment potential	0.45	Mixed use	0.23	Calculator	6750	No relevant planning history.	Conservatory Area also within western boundary.	Vacant, commercial (B2)	Site previously housed an industrial warehouse	Some vacant land with the north, identified for redevelopment for many commercial or residential uses.	PDL	The topography of the site results in a number of retaining walls.	Site adjacent to Grade II listed Standford House and Summerhall Conservation Area.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	Mitigation would enable.	Noise / vibration from St James Boulevard.	Close proximity to the A169	Public Transport Accessibility: Grade A+	Less than 500m away	No	The site has been identified as a result of pre-application enquiries. The approved Standford Square Developer Guidance note covers the site and identifies the provision of a main footway/pedestrian route through the site to link Summerhall area with Standford Square.	The application enquiry indicates developer interest. Site has also been considered as part of the SHLAA.	Connectivity would be improved as a result of the development of the site.	30	Prime location at the entrance to the Discovery Quarter. Owner is pursuing student accommodation on the site.	
1490	Castle Industrial Materials	City Centre	Regional Mixed Use Land (Discovery Quarter) CCAMP. Sites with significant employment potential	Private	Available	Existing with redevelopment potential	6.2	Residential / Mixed Use	1.55	Calculator	46200	20091923/O/RES	Adjacent to gas holder and railway line. Wildlife corridor runs parallel to the eastern boundary.	Vacant, commercial (B2)	Remains of previous buildings are still visible on site.	Vacant, commercial. Former Gas Yard.	PDL	Sloping but mitigation would enable.	Adjacent to gas holder and railway line. Former gas holder and railway line. Wildlife corridor runs parallel to the eastern boundary.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	Mitigation would enable.	B2 uses.	Major contribution required for accessibility improvements	Close proximity to Scotwood Road and the A1	Public Transport Accessibility: Grade A+	Edge of City Centre	No	The site has planning permission for housing, but ultimately may come forward for mixed use.	Viability continues to be an issue, due to current market conditions. However, the site is likely to come forward for residential development without public sector intervention when market conditions improve.	Potential environmental improvements.	23	Development on site has commenced for residential development. No realistic prospect of office development on the site due to edge of centre location.
1056	Portland Road Phase 2	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Quasburn	Available	Potential	1.75	Mixed use	0.75	Design	11428	20090759/O/DET	EDS.1 ED4.1 C4 CA.1	Vacant land.	Adjacent to purpose built student accommodation.	PDL	Mitigation would enable.	Ground contamination.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No obstacles.	No obstacles.	Mitigation would enable.	Via Portland Road.	Close proximity to Central Motorway.	Public Transport Accessibility: Grade A+	Edge of City Centre	Site is being actively marketed for office space.	Development has stalled as a result of the recession. Developer requires substantial pre-lets for B1 (circa 60%) to trigger development on site.	Minor area currently in discussions with potential joint venture partners and hope to be able to commence works during 2010.	Potential environmental improvements.	26	The likelihood of the site coming forward for employment uses is very limited.		
4245	Portland Road Phases 1A and 1B	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Quasburn	Available	Potential	1.76	Offices	0.35	Design	5950	20090406/O/DET	EDS.1 ED4.1 C4 CA.1	Vacant land.	Adjacent to purpose built student accommodation.	PDL	Mitigation would enable.	Ground contamination. Ground stability.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No obstacles.	No obstacles.	Mitigation would enable.	Via Portland Road.	Close proximity to Central Motorway.	Public Transport Accessibility: Grade A+	Edge of City Centre	Site is being actively marketed for office space.	Development has stalled as a result of the recession. Minor area currently in discussions with potential joint venture partners and hope to be able to commence works during 2010.	Minor area currently in discussions with potential joint venture partners and hope to be able to commence works during 2010.	Potential environmental improvements.	31	The likelihood of the site coming forward for employment uses is very limited.		
1076	Lindwell West of Free Trade PH	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private: English Partnerships	Available.	Potential	0.22	Mixed use	0.11	Calculator	1850	No relevant planning history.	EDS.1	Vacant site, which lies above the mouth of the Ouseburn.	Vacant.	Residential / Public House to the east.	PDL	Steeply sloping.	Contamination likely.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Potential land stability issues. Mitigation would enable.	Noise from the adjacent Public House.	Via St Lawrence Road & Quayside.	Close proximity to strategic road network.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Landowner submitted site for consideration for housing as part of SHLAA call out.	Site unlikely to come forward for development until market conditions improve and it is uncertain as to whether the site will come forward for residential or employment.	Potential environmental improvements.	25	Discount: site too small for inclusion within the Employment Land Review.
1161	George, Lime Street	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private	Available	Potential	0.3	General	0.30	Calculator	9	No relevant planning history.	EDS.1	Vacant commercial.	Residential to the west, vacant to the north. Vacant industrial to the south and east.	PDL	No obstacle.	Possible contamination.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via Lime Street.	Close proximity to strategic road network.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Landowner unlikely to bring the site forward for redevelopment under current market conditions.	Essential de-risking works required.	Potential environmental improvements.	24	Discount: Site is long term and uncertain and is too small for inclusion in Employment Land Review.		
3542	47-49 Lime Street	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private: Ouseburn Trust	Available	Potential	0.18	Mixed use	0.18	Calculator	2400	No relevant planning history.	EDS.1 CA.1	Vacant land and building, subject of renovation by the Ouseburn Trust.	B1/B2 - vacant land.	PDL	Sloping - mitigation would enable.	Ground conditions / land stability. Mitigation would enable.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via Lime Street.	Close proximity to strategic road network.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Potential for conversion of existing building.	Development partner required. Not expected to come forward in current market conditions.	Potential environmental improvements.	24	Discount: The likelihood is that the site will be redeveloped rather than redeveloped and the future use may not be employment. In addition the site is too small for inclusion in the Employment Land Review.		
3567	Moley's, Alton Row	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private	Available	Potential	1.42	Mixed use	0.71	Calculator	4260	No relevant planning history.	EDS.1	Industrial - Warehousing site (B2 and B1c)	Used for vehicle hire, repair and storage by Moley's.	West - scrap metal processing. Vacant industrial use to the north, south and east.	PDL	No obstacle.	Likely contamination. Mitigation would enable.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Adjacent to scrap metal processing.	Via Alton Row.	Close proximity to Alton Row.	Public Transport Accessibility: Grade A+	Edge of City Centre	Landowner has previously sought residential development. Strong interest in acquiring the site.	Landowner has expressed an interest in bringing the site forward for residential development.	De-risking works required.	Potential environmental improvements.	24	Discount: the likelihood is that the site will come forward for residential use.
3569	5D Metal Recycling Quality Row	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private: Kenning Hall Holdings	Available	Potential	1.07	Mixed use	0.79	Calculator	3150	No relevant planning history.	EDS.1 B2	Industrial - Warehousing site.	In use, mainly metal recycling.	Residential to the north, remainder is commercial.	PDL	No obstacle.	Heavily contaminated. Mitigation would enable.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via Ford Street or Byker Bank.	Close proximity to the strategic road network.	Public Transport Accessibility: Grade A+	c 500m	The site has been identified as being available, suitable and deliverable by the Strategic Housing Land Availability Assessment.	Remediation work required.	Potential environmental improvements.	26	Discount: the likelihood is that the site will come forward for residential use.		
4290	Ice Site	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private: ING	Available	Existing	0.19	Mixed use	0.10	Calculator	2850	20071311/O/DET (purpose built student accommodation)	EDS.1 CA.1 NCI.5 NCI.6	Operational builders' storage yard	Predominantly B1/B8	PDL	No obstacle.	Narrow site, possible contamination.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	Potential land stability issues. Mitigation would enable.	Adjacent to B2/B8 land uses.	Via Ford Street.	Close proximity to strategic road network.	Public Transport Accessibility: Grade A	Edge of City Centre	No	The building is listed and very attractive, however previous studies indicate the site would not be viable for residential use. Deep floorplate is more appropriate for B1 uses, but there is limited demand for refurbished office space.	ING to bring the site forward.	Potential social benefits from the development of the site.	30	Discount: ING have indicated that the building provides a longer term opportunity to develop a commercial or residential offer on the site. The site is too small to be included within the Employment Land Review.	
1118	Upper Searlings - Lower Phase	Quasburn	Ouseburn Regeneration Area, Urban Core Brownfield Mixed Use	Private Ownership	Available.	Potential	0.38	Mixed use	0.26	Design	1560	20061265/O/DET	EDS.1 CA.1	Vacant site	Predominantly B1 & B2 uses	PDL	Level plateau site. Land stability and sewerage issues.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Yes - Sequential test would be required for offices and other town centre uses.	No obstacles.	No obstacles.	Via Steppay Bank	Close proximity to strategic road network.	Public Transport Accessibility: Grade A	Edge of City Centre	No	Application for office development was refused to delay in signing H18 (20091285/O/DET)	De-risking works required.	Potential environmental improvements.	27	Discount: Small land locked site, difficult for redevelopment without land assembly.			
4223	Former Time Tesco location	City Centre	Other Urban Core Brownfield Mixed Use	Private: Buccugh Estates	Not available	Potential	0.45	Mixed use	0.15	Design	2250	No relevant planning history.	White land allocated open space to the northern boundary. The site is within the allocated city centre boundary, planning consent.	Cleared site within established city centre boundary.	Cleared site.	The surrounding area of East Quayside contains a mix of uses from established use including Melbourne Court to modern offices and apartments along the Quayside.	PDL	The site slopes from north to south, with a fall of some 6.5 metres.	No overriding physical or policy constraints to employment uses.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	Mitigation would enable.	Access good and direct from City Road.	Close proximity to strategic road network.	Public Transport Accessibility: Grade A+	Edge of City Centre	Yes	Site is cleared and developer is pursuing redevelopment of the site.	Viability affected by recession. Range of suitable uses including offices.	Environmental benefits.	29	Cleared site within established city centre boundary. Adjacent to established central east Quayside office quarter. However, the site is too small for inclusion in the Employment Land Review.	
4388	North Easton Co-op, 717 Newcastle Street	City Centre	Other Urban Core Brownfield Mixed Use	Private	Upper floors available	Potential	0.45	Mixed use	0.25	Calculator	3750	No relevant planning history.	B2 / B4 A1	COOP Ground floor foodbank, upper floors vacant retail space.	The Gates leisure complex.	PDL	No obstacle.	Central Conservation Area.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	Not required.	No obstacles.	No obstacles.	Noise from adjacent leisure uses.	Pedestrian access can be gained from Andrew Street / Newcastle Street. Service entrance via Stewart Street.	Highly accessible location, good links to strategic road network.	Public Transport Accessibility: Grade A+	City Centre	No	The building is listed and very attractive, however previous studies indicate the site would not be viable for residential use. Deep floorplate is more appropriate for B1 uses, but there is limited demand for refurbished office space.	Public sector funding may be required to bring forward the site.	Potential environmental improvements.	24	Discount: the likelihood is that the site will be redeveloped rather than redeveloped in the future. No certainty as to whether employment uses will come forward on the site.	
4162	Fort Yard East inc Kings House	City Centre	Other Urban Core Brownfield Mixed Use	Private	Feasibility study for Kings House has been prepared.	Potential	1.34	Mixed use	0.17	Calculator	1620	No relevant planning history.	EDS.1 CA.1	Commercial	Existing building on site.	Vacant commercial	PDL	No obstacle.	Concerns regarding tall buildings overlooking the site. Railway line to the eastern boundary.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	No obstacles.	Noise / vibration from existing strategic road network.	Close proximity to the strategic road network.	Public Transport Accessibility: Grade A+	Edge of City Centre	No	Site could come forward without public sector intervention.	Public sector funding has indicated an interest in the site.	Sustainable location, which reduces the need to travel and could potentially improve the environment. The likelihood is that Kings House will be redeveloped rather than redeveloped. There is no certainty as to whether this will include employment uses.	29	Railway arches with substantial under cost a vital link into 4th year housing from the proposed Department Quarter redevelopment. The likelihood is that Kings House will be redeveloped rather than redeveloped. There is no certainty as to whether this will include employment uses.	
4133	Chelton Bonds Building, Waterloo Street	City Centre	Other Urban Core Brownfield Mixed Use	Council Owned	Available	Potential	1.39	Offices	0.88	Calculator	2100	No relevant planning history.	CA.1 CA.3	Vacant	Existing former bonded warehouse circa 1880, built over 4 floors, 1,850 sq.m. being marketed for a range of uses including B1	Mix of residential, commercial and cemetery to the rear.	PDL	No obstacle.	Heritage constraint to the rear of the site to be retained.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	No obstacles.	Via Waterloo Street / Peel Lane	Close proximity to strategic road network.	Public Transport Accessibility: Grade A+	c 500m	Being marketed for disposal by the City Council. Informal guidance issued for suitable uses including B1.	Viability issues in the short to medium term.	Refurbishment or demolition of the existing building required.	Potential environmental improvements.	26	Discount: the site is below the minimum threshold for inclusion within the Employment Land Review.	
4246	St George's Car Park & TA Centre	City Centre	Other Urban Core Brownfield Mixed Use	Private (TA & Duddington House have an option on part)	Available.	Potential	0.43	Offices	0.22	Calculator	960	No relevant planning history.	White land allocated to railway.	Surface car parks.	TA building and surface car parking.	Student housing to the south. Urban motorway - west, TA and B1 uses to the east and north.	PDL	Slopes from north to south (embankment to the west boundary - railway buffer and north of site)	No overriding physical or policy constraints to employment uses.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	The site is not located within a Strategic Commission Area.	No sequential test required.	No obstacles.	Mitigation would enable.	Adjacent to Central Motorway.	Via Sandford Road.	Immediately adjacent to strategic road network.	Public Transport Accessibility: Grade A+	Edge of City Centre	No	Student accommodation preferred for site - logical continuum to Victoria Hall scheme to the south. Ranked a high priority in Purpose Built Student Accommodation (PBA).	Existing uses would need to be decanted. Replacement car parking car site would be required.	Highly accessible location - reducing the need to travel.	23	Discount: the site will be redeveloped by Newcastle University.

EMPLOYMENT LAND PORTFOLIO FOR SUBMISSION

As at January 2014

Ref	Site name & address	Location	Typology	Ownership	Availability for Employment Uses	Employment Land Site Status (Employment Potential)	Site area (ha)	Likely use	Net Area (ha) Available for Employment Land	Basis of Floor Space Calculation or EP	B1, B2, B8 floor space potential sq.m.	Planning Status	Allocated Uses / Constraints	Present Land Uses on Site	Details of Existing Premises	Neighbouring Land Uses	GF or PDL	Site Topography	Site Constraints	EMD	Regeneration Priorities: Regeneration Growth Area	Sequential Test Required	Utilities Capacity Issues	Land Stability	Proximity to Incompatible Uses: Air Pollution / Noise	Access	Proximity to Strategic Road Network	Public Transport Accessibility	Proximity to local services	Marketing Details (has marketing of the site for employment uses)	Market Attractiveness	Deliverability (Viability) (Whether the site requires public sector intervention, land assembly, viable range of uses etc)	Employment Potential (Potential jobs/employment opportunities within the site)	Total Ranking (out of 6)	Conclusion
1533	Terrace Place Car Park	City Centre	Other Urban Core Brownfield Mixed Use	Private	Available	Potential	0.34	Offices	0.17	Calculator	9100	No relevant planning history.	White land.	Surface car parks.	N/A	Mix of commercial and residential	PDL	No obstacles	Leases Conservation Area	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	No sequential test required	No obstacles	No obstacles	Via Terrace Place.	Close proximity to the Central Mainway.	Public Transport Accessibility: Grade A+	City Centre.	No	Small, irregular shaped site unlikely to be attractive to the market.	Barber and Stonehouse have an easement over the site.	1881 site maximising accessible location.	25	Discount - the likelihood is that the site will come forward for residential development rather than employment uses.	
3274	Collingwood Buildings	City Centre	Other Urban Core Brownfield Mixed Use	Private	Available	Potential	0.19	Offices	0.08	Calculator	2400	No relevant planning history.	No overhanging physical or policy constraints.	Former commercial	Former commercial building (Grade B listed). Vacant on upper floors. Ground floor mixed uses	Commercial	PDL	No obstacles	Listed Building	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	No sequential test required	No obstacles	No obstacles	Air quality	Via Collingwood Street.	Close proximity to the strategic road network.	Public Transport Accessibility: Grade A+	Less than 500m	No	Site could come forward for a range of uses including residential an offices.	Unlikely to come forward under current market conditions.	Potential environmental improvements.	26	Discount - the site is to be re-used rather than redeveloped.
3381	2 - 4 Hanover Square	City Centre	Other Urban Core Brownfield Mixed Use	Private: R.Zak	Available	Potential	0.17	Residential or commercial B1 offices	0.09	Calculator	2700	No relevant planning history.	ED2.2 CA.1	Vacant commercial. The site contains a vacant 3 - 5 storey vacant property and associated car park.	3 - 5 storey vacant commercial building.	Casino and residential. Site within close proximity to the Stephenson Quarter, which is seen as a mixed-scheme of regional significance. It represents the area between the Discovery Quarter and the Quayside.	PDL	No obstacles	Significant conservation issues.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	No sequential test required	No obstacles	No obstacles	Via Hanover Street (the benefits from good accessibility to Central Station).	Close proximity to the strategic road network.	Public Transport Accessibility: Grade A+	Less than 500m	No	Site lies within the Central Conservation Area. The area is predominantly a mix of residential buildings including Turfboat Building, Quayside Lifts and office buildings. Stephenson Quarter to the west of the site.	Unlikely to come forward under current market conditions.	Potential environmental improvements.	24	Discount - the site is too small for inclusion within the ELR.	
3031	Hanover Buildings	City Centre	Other Urban Core Brownfield Mixed Use	Private	Available	Potential	0.08	Offices	0.08	Calculator	2400	Extant permission for 2, 4 and 5 storey office block (2,371sq.m)	Conservation Area.	Clear site.	Vacant, suitable for B1 use and / or residential. Extant permission for 2, 4 and 5 storey office block (2,371sq.m)	Commercial	PDL	No obstacles	Significant conservation issues.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	No sequential test required	No obstacles	No obstacles	Via Chevington Place	Close proximity to strategic road network.	Public Transport Accessibility: Grade A+	Less than 500m	Yes	Good location, contained slightly by height restrictions due to conservation issues which may affect viability and demand. No progress on B1 consent dated 2009. Site is unlikely to come forward in advance of major development opportunities in the surrounding area. B1 or C3 most viable use. Scheme likely to proceed on the back of Stephenson Quarter which is an unimpeded planning	Unlikely to come forward under current market conditions.	Environmental benefits.	31	Discount - the site is below the minimum threshold for inclusion within the Employment Land Review	
1180	Former Dallas Carport	East	Other Urban Core Brownfield Mixed Use	Private	Available	Potential	0.13	General	0.13	HCA	546	No relevant planning history.	CA.1	Rural	Steel frame warehouse	Commercial	PDL	No obstacles	No obstacles	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	No obstacles	Via Duse Street.	Close proximity to the strategic road network.	Public Transport Accessibility: Grade A	<500 m	No	Small site in use, unlikely to come forward for employment uses under current market conditions.	Clearance of buildings / site renovation	1881 site maximising accessible location. Potential to provide for new employment's mix of uses.	27	Discount - the site is below the minimum threshold for inclusion within the Employment Land Review	
3070	Violet Close and Buttle Road	Inver West	Other Urban Core Brownfield Mixed Use	Council Owned	Available	Allocated (BSAAP (EG))	1.02	General	0.51	Calculator	2142	No relevant planning history.	ED4.1	Vacant	N/A	No obstacles	PDL	Mitigation would enable	Heavy tree cover throughout site. Residential to the eastern boundary.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	No obstacles	Adjacent to Whitehouse Road Enterprise Centre.	Close proximity.	Public Transport Accessibility: Grade A	<750m	No	Prominent site in close proximity to existing commercial uses.	Irregular shaped sloping site. Unlikely to be brought forward without public sector intervention.	1881 site maximising accessible location. Potential to provide for new employment's mix of uses.	25	The likelihood is that the site will come forward for housing.	
4758	Phoenix Works, High Street, Newburn	Inver West	Other Urban Core Brownfield Mixed Use	Private Ownership	Available	Allocated	0.7	General	0.70	Calculator	2840	No relevant planning history.	ED3.1 ED4 ED4.1 NC1.1 NC1.5 NC1.6	Vacant B2/B8	Warehouses	Scopyard and B2	PDL	No obstacles	No obstacles	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	No obstacles	Adjacent to scrap yard.	Via Newburn High Street	Public Transport Accessibility: Grade C	<750m	No	Part of ED3.1 UDP allocation which is to be de-allocated. Site may come forward for	Demolition of existing warehouses and possible contamination.	Potential environmental improvements.	21	Discount	
3359	Lemington Glassworks	Outer West	Other Urban Core Brownfield Mixed Use	Private Ownership	Available	Allocated	1.06	General	1.06	HCA	4462	No relevant planning history.	ED3.1 CA.1 NC1.6	Caravan storage park.	No premises on site - static caravans only	Industrial, vacant and residential.	PDL	Flat - no obstacles	Land set down considerably lower than neighbouring commercial use of Land Rover and possible conflict with scale of building in relation to the higher ground level. Possible conflict with Lemington Glassworks.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	Mitigation would enable	Close proximity to Tarmac plant.	Reasonably close proximity to Strategic Road Network.	Public Transport Accessibility: Grade C	<750m	No	Could come forward for housing with 3369 and 2804. Development of the site constrained by viability issues.	Land assembly required. Development, unlikely to be viable under current market conditions. May come forward for non-employment uses.	Potential environmental improvements.	24	Discount. The likelihood of the site coming forward for employment uses is very limited.	
3103	Alkington Road	Inver West	Other Urban Core Brownfield Mixed Use	Council Owned	Available	Allocated (BSAAP)	0.26	Mixed use	0.13	Calculator	1950	No relevant planning history.	ED3.1 CA.1 NC1.6	Allocated for mixed use development in the BSAAP	Existing medical centre and car park and site is vacant library building	Surrounded by residential.	PDL	No obstacles	Existing users would need to be decanted.	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	No obstacles	Unconstrained.	Close proximity to both Scotswood Road and West Road.	Public Transport Accessibility: Grade A	Less than 500.	No	Viability constraints in current market.	Site could be brought forward for a number of uses including residential.	Job opportunities within deprived communities.	26	Discount. The likelihood is that the site will come forward for housing.	
3123	Former Mary Trevelyan School	Inver West	Other Urban Core Brownfield Mixed Use	Council Ownership	Not available.	Potential	1.65	Mixed Use	0.65	Calculator	5220	No relevant planning history.	OS1.3 OS1.6 OS4	White land	Classed site	Residential and nursery to the northern boundary. Church to east and B2 to west boundary	PDL	Site slopes from north to south.	Mature trees and wildlife corridor to the southern boundary. Possible	Site within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	No obstacles	Via Scotswood Road	Immediately adjacent to Scotswood Road.	Public Transport Accessibility: Grade A+	<500m	Yes	Viability constraints in current market, however there is current interest from a national car dealership and retailer.	Viable range of uses including employment when the market returns.	Job opportunities within deprived communities.	31	Discount. The likelihood is that the site will come forward for retail / car showroom uses.	
4739	Former Jesmond Picture House	North	Other Urban Core Brownfield Mixed Use	Private	Available	Potential	0.06	Offices	0.06	Calculator	900	No relevant planning history.	White land. Adjacent to residential.	Former Picture House.	Existing building could be converted into office space.	Surrounded by residential.	PDL	No obstacles	No obstacles	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England	The site is not located within a Strategic Commission Area	Yes - Sequential test would be required for offices and other town-centre uses.	No obstacles	No obstacles	Via Jesmond Dene.	Close proximity to the strategic road network.	Public Transport Accessibility: Grade A+	Less than 500m away	Yes	Unlikely to come forward under current market conditions.	Suitable for a range of uses including office and residential.	Highly accessible location, next to Metro station.	23	Discount. The likelihood of the site coming forward for employment uses is very limited, and the site is too small for inclusion within the Employment Land Review.	
4211	NGP office block D, C&F	North	Prestige Employment Site	Private: NGP Consortium	Not available.	Allocated	0.49	Housing	1.49	Calculator	21942	19991300117/REE. Pre-application discussions for residential development are underway.	ED1 ED1.1 ED1.3 OS1.2 OS1.4 OS1.6 OS4	Greenfield site.	N/A	Adjacent to existing office accommodation.	GF	No obstacles	No obstacles.	Site is not within an SCA which is within either the most 10% or 20% socially and economically deprived in England.	Not within a Strategic Commission Area.	No - the site has been allocated for employment use.	No obstacles	No obstacles	Close proximity to airport and the A1.	Via Brunton Lane / Bobby Robson Way	Public Transport Accessibility: Grade A+	Local centre proposed as part of Great Park (1999130011/OUT)	Yes (By Knight Frank)	Identified as a key strategic employment site, of national and regional importance. Ultimately, NGP is projected to create over 10,000 jobs, attracting national and international companies to its impressive location. Already home to software giant SAGE world headquarters, the NGP Business Park offers flexible modern high quality workspace.	Viable without intervention from the public sector.	Opportunity to deliver high quality of jobs	40	Retain as employment site.	

	Short ha	Medium ha	Long ha	Short sq m	Medium sq m	Long sq m
General & B1/B2/B8	14.14	27.82	19.08	46,264	125610	96609
Offices B1(a)	7.55	16.69	15.89	93896	163952	2E+05
Total	21.69	44.51	34.97	140,160	289562	3E+05

a. Total Gross ha	725.1
b. Total Net	419.4
c. Total Floor space sq.m	#####
d. Discount Gross ha	575.7
e. Discount Net ha	317.9
f. Total discounted floorspace	#####

Total floorspace 781,543

Appendix J – Floorspace calculator

Appendix J – Floorspace calculator

Location	Site area (ha.)	Plot coverage (%)	No. of storeys (excluding car parking)	Gross floorspace (sq.m)	% devoted to offices	Plot ratio (gross area/ gross office floorspace)	Gross office floorspace (sq.m)
City centre	1.00	60%	5	30,000	50%	150%	15,000
Ouseburn	1.00	50%	3	15,000	40%	60%	6,000
Business Park	1.00	20%	3	6,000	100%	60%	6,000

Appendix K – SIC classifications used to derive floorspace requirements

Appendix K – SIC classifications used to derive floorspace requirements

In order to analyse employment trends in warehousing in Newcastle, the following 4 digit Standard Industrial Classification (SIC) code have been used – these fall within the main use classes of Wholesaling; Transport and Communications.

SIC Code	Sector Name
5111	Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods
5112	Agents involved in the sale of fuels, ores, metals and industrial chemicals
5113	Agents involved in the sale of timber and building materials
5114	Agents involved in the sale of machinery, industrial equipment, ships and aircraft
5115	Agents involved in the sale of furniture, household goods, hardware and ironmongery
5116	Agents involved in the sale of textiles, clothing, footwear and leather goods
5117	Agents involved in the sale of food, beverages and tobacco
5118	Agents specialising in the sale of particular products or ranges of products not elsewhere classified
5119	Agents involved in the sale of a variety of goods
5121	Wholesale of grain, seeds and animal foods
5122	Wholesale of flowers and plants
5123	Wholesale of live animals
5124	Wholesale of hides, skins and leather
5125	Wholesale of unmanufactured tobacco
5131	Wholesale of fruit and vegetables
5132	Wholesale of meat and meat products
5133	Wholesale of dairy produce, eggs and edible oils and fats
5134	Wholesale of alcoholic and other beverages
5135	Wholesale of tobacco products
5136	Wholesale of sugar and chocolate and sugar confectionery
5137	Wholesale of coffee, tea, cocoa and spices
5138	Wholesale of other food including fish, crustaceans and molluscs
5139	Non-specialised wholesale of food, beverages and tobacco
5141	Wholesale of textiles
5142	Wholesale of clothing and footwear
5143	Wholesale of electrical household appliances and radio and television goods
5144	Wholesale of china and glassware, wallpaper and cleaning materials
5145	Wholesale of perfume and cosmetics
5146	Wholesale of pharmaceutical goods
5147	Wholesale of other household goods
5151	Wholesale of solid, liquid and gaseous fuels and related products
5152	Wholesale of metals and ores
5153	Wholesale of wood, construction materials and sanitary equipment
5154	Wholesale of hardware, plumbing and heating equipment and supplies
5155	Wholesale of chemical products
5156	Wholesale of other intermediate products

SIC Code	Sector Name
5157	Wholesale of waste and scrap
5181	Wholesale of machine tools
5182	Wholesale of mining, construction and civil engineering machinery
5183	Wholesale of machinery for the textile industry, and of sewing and knitting machines
5184	Wholesale of computers, computer peripheral equipment and software
5185	Wholesale of other office machinery and equipment
5186	Wholesale of other electronic parts and equipment
5187	Wholesale of other machinery for use in industry, trade and navigation
5188	Wholesale of agricultural machinery and accessories and implements, including tractors
5190	Other wholesale
6024	Freight transport by road
6311	Cargo handling
6312	Storage and warehousing
6321	Other supporting land transport activities
6411	National post activities
6412	Courier activities other than national post activities

Appendix L – Analysis of Newcastle’s key economic sectors

Appendix L: Population and Economic Activity (July 2008 – June 2009)

	Newcastle Numbers	Newcastle	North East	Great Britain
Population		292,000	2,606,600	60,462,600
Economically Active	142,000	70.1	73.3	76.5
In employment	128,200	62.9	65.2	70.2
Employees	112,600	55.4	58.6	60.4
Self-employed	15,600	7.5	6.3	9.4
Unemployment rate	14,700	10.3	10.9	8.1
Economically inactive	63,000	29.9	26.7	23.5
...Of whom want a job	14,100	23.4	24.9	23.9
....Of whom do not want a job	45,900	76.6	75.1	76.1



Newcastle Property Market Overview and Demand Assessment

Prepared on behalf of

Newcastle City Council

April 2012

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Appendices

Appendix A – Sector Definitions and Full Employment Forecasts for Newcastle, 2010 – 2030 – 2038

Appendix B - Employment Forecasts, Floor Space Estimates and Employment Land Requirements for selected years between 2010 and 2038

1 Introduction

1.1. Newcastle City Council has commissioned DTZ to undertake an update of the Commercial Demand Assessment, originally prepared by us on your behalf in February 2010. The new report will need to reflect the changes in economic and market conditions since early 2010 and in particular to update projections of employment floor space demand in the light of the North East Integrated Policy Model which provides revised forecasts of employment change across the North East. The purpose of the report is to provide evidence to inform the Core Strategy in respect of employment land policy.

1.2. The report provides an update to the following:

- Overview of the UK economy and commercial property market
- Assessment of the office and industrial property markets in Newcastle including take-up, rental levels and the development pipeline
- Analysis of historical take-up of employment land in Newcastle, broken down by office, industrial and warehousing use types
- Future floor space and employment land requirements in Newcastle up to 2038 – focusing on office, industrial and warehousing use types – based on the new enhanced projections into employment growth being undertaken by the research team at St Chads, Durham University.
- Interpretation of the implications of the above analysis for employment land policy.

1.3. The report is structured as follows:

Section 2 gives an overview of the UK economy and property market

Section 3 assesses the national office market, including take-up, rental levels and the development pipeline

Section 4 provides an overview of the office market in Newcastle

Section 5 assesses the national industrial market, including rental levels and enquiries

Section 6 provides a review of Newcastle's industrial market

Section 7 outlines the key messages from the property market review in sections 2-6.

Section 8 provides an analysis of historical take-up of employment land in Newcastle, broken down by office, industrial and warehousing use types

Section 9 summarises the three employment scenarios developed as part of the study

Section 10 translates the forecasts from section nine into future floor space and employment land requirements in Newcastle up to 2038 – focusing on office, industrial and warehousing use types

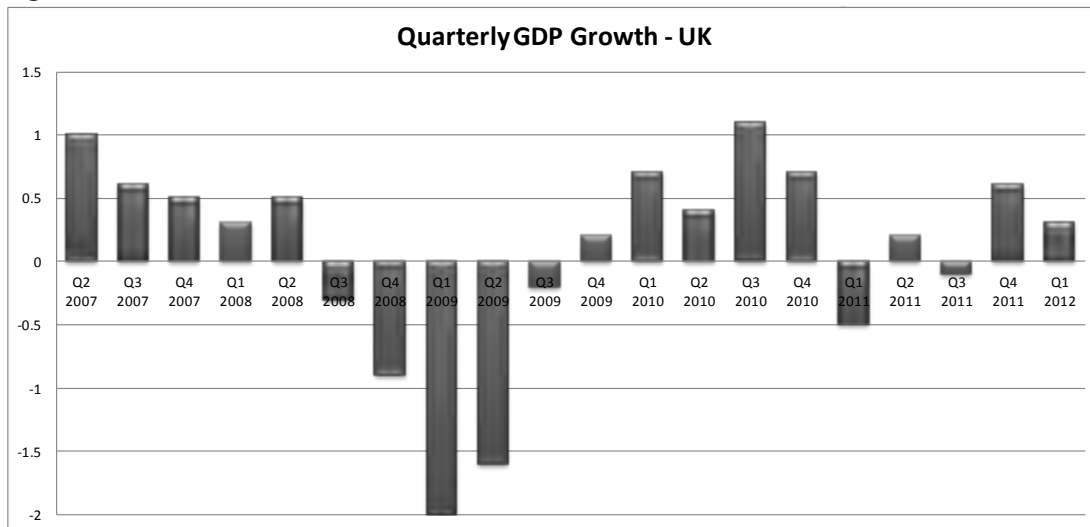
Section 11 summarises the main findings from sections 8-10 in terms of historical take-up, sector growth, labour supply and floor space/employment land requirements

2 Economic and Property Market Overview

2.1 Economy

2.1.1. The UK economy officially entered into recession in January 2009 after two consecutive quarters of negative growth, finally emerging in Q4 2009 after the UK economy grew by 0.2%. Since that date growth registered by the UK has fluctuated between small positive and negative growth and recently re-entered recession.

Figure 2.1 –source Office National Statistics



2.1.2. The combination of a decline in demand, falling asset values and rising commodity prices throughout the last 4 years has led to many companies suffering. The threat of certain companies, initially banks and retailers but later insurers and large scale manufacturers, seen as „too big to fail’ verging on collapse prompted national governments around the world to take action. In the UK, the government proposed packages to shore up the balance sheets of RBS, Lloyds TSB, HBOS and Northern Rock. In the US, government packages were proposed for Bear Sterns, Freddie Mac and Fannie Mae, AIG and General Motors. The result of these packages is that national governments have become majority shareholders in a wide range of companies, in many cases under-writing the assets and liabilities that such companies hold.

2.1.3. The effect of the above is two-fold. Governmental action does appear to have stemmed the unprecedented potential failure of the „institutional’ companies, leading to a return to more conventional recessionary behaviour in the markets. It has also left governments around the world with massive national debts and exposure to some of the more toxic assets that these failing companies possessed.

2.1.4. Despite the stabilisation of certain economic indicators, there are still major threats to ongoing stability and eventual recovery. The most immediate, and potentially serious, threat derives from the potential down-grading of government debt. Concentrating specifically on the UK, the effect of such a down-grading on the raising of government debt finance would be twofold. The return on UK government bonds that investors would expect would be higher should the rating be down-graded due to the greater risk that such a rating would indicate. This would mean that the government would need to sell more bonds and, thus, incur a greater national debt than they would if the higher rating was maintained. Secondly, investors may not be as keen to buy UK government bonds when they are down-graded. At the moment bonds are used as a low-risk, low-return investment. Many other

national governments are rated AAA, as are some of the large multi-national companies such as ADP, Berkshire Hathaway, Exxon Mobil, Johnson & Johnson, Microsoft and Pfizer. As previously mentioned, AAA bonds are bought when a purchaser wants a low risk, low return investment. Therefore, if the UK government drops to AA+, it will no longer be considered as an option for that particular market, potentially reducing its ability to raise large quantities of debt finance. As such, the increased cost and reduced availability of finance caused by this potential down-grading could seriously alter all government economic forecasts for the worse.

2.1.5. Such economic uncertainty makes forecasting of any kind extremely difficult. The DTZ house view is that, after being positive for much of 2011, many economic indicators will not return to growth until 2014 although it is worth noting that even this has altered as major unexpected events unfold. Economic forecasting while, by its very nature forward looking, must be reactive to current events. As such, all comments contained within this report regarding expected behaviour within the property market should be interpreted with respect to current knowns.

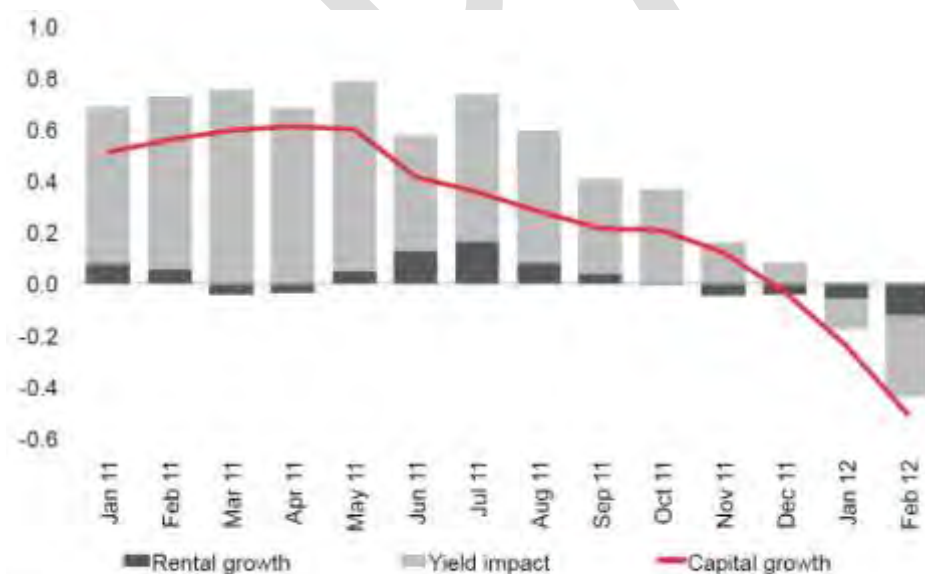
2.2 Property Market

Investment

2.2.1. Forecasts indicate the property market continues to perform poorly as an investment class.

- All property sectors performed poorly in February and the fall in All Property capital values intensified
- Retail was the worst performing sector in February, as it has been for much of the 2011 / 2012;
- Industrial was the least badly affected as it has the highest income return;
- All Property capital growth continued its downward trend over 2011/2012. This was driven by a falling and now increasingly negative yield impact.

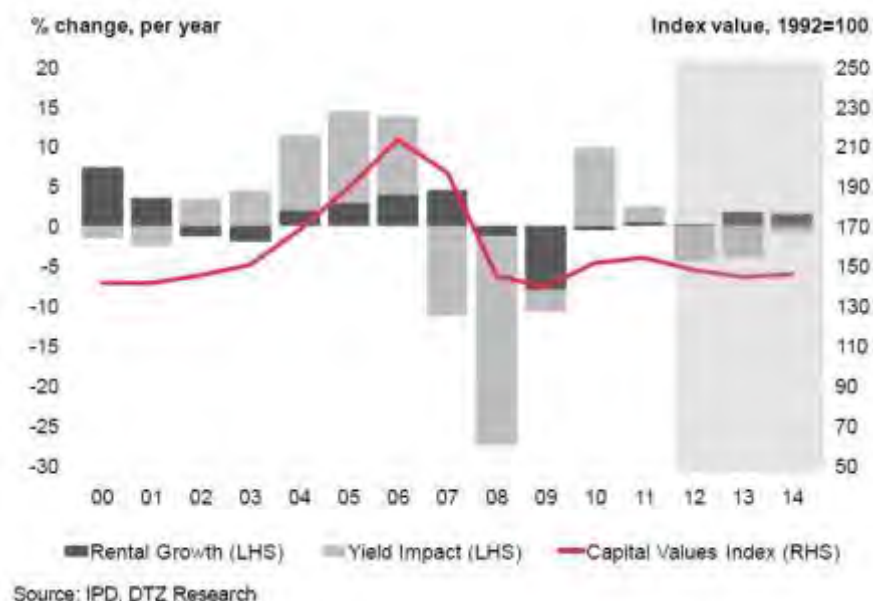
Figure 2.2 - 3 month All Property Return% change



Source: IPO

2.2.2. Taking a step back and looking at the trends on an annualised basis, it appears that capital values are to fall to 2002 levels by 2013, though the deeper trough of 2009 is likely to be avoided.

Figure 2.3 – Annual All Property Return% change



Office

2.2.3. The UK office market is currently characterised by a shortage of new private sector occupier requirements outside of London’s City and West End, and a select number of south east markets. This shortage of occupier demand has led to landlords chasing the few solid occupier requirements that do appear, competitively driving down rental levels or increasing the rental incentives available. Many of the deals that are occurring in the market are being driven by lease events rather than new requirements, with tenants using the opportunity presented by such events to “shop around” in order to achieve a competitive deal.

2.2.4. The impact of the lack of private sector demand is exacerbated by the ongoing public sector contraction. Whilst very active over the last decade, the cuts that are underway in the public sector in terms of both operational and capital budgets are having a noticeable impact. There is an embargo on the signing of all new leases without prior sign off from HM Treasury in addition to the phased reduction of operational floorspace requirements that has come hand in hand with headcount reductions and, in the case of some government agencies such as the Regional Development Agencies, disbandment.

2.2.5. In addition to the lack of occupier demand, development is being affected by Empty Rates legislation which continues to dampen developer appetite for speculative construction. The supply of speculative property to the market is also being reduced by ever more onerous bank criteria for lending. Minimum requirements for the few lenders willing to consider funding now include either 100% or a significant majority of a property to be pre-let, a developer’s profit of 20% on cost (an increase from 15% in 2008 for speculative schemes) and ever decreasing Loan to Value (LTV) ratios.

Industrial

2.2.6. Over the past 10 years, much of the development in the UK Industrial market has been driven by a lack of product in the investment market leading to investors specifically funding new vacant space with the aim of achieving early lettings and investment creation.

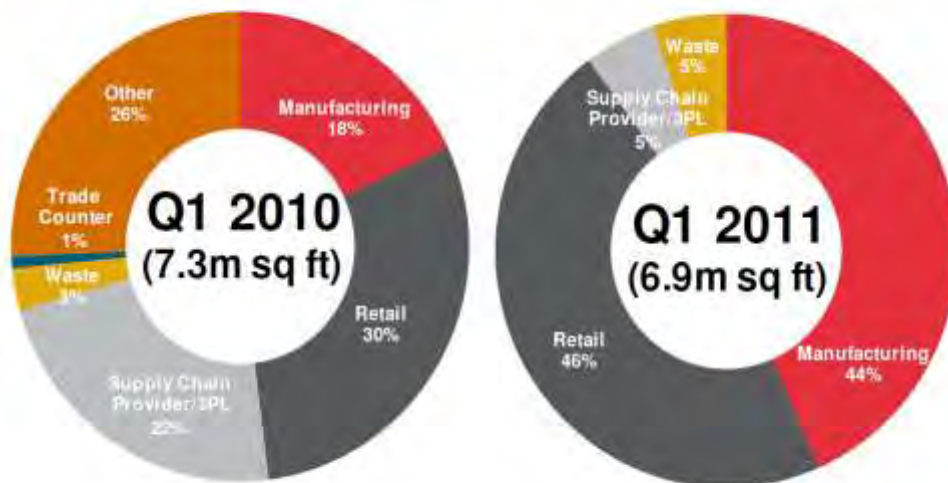
2.2.7. The pressure on the availability of land, congestion and the cost of labour in the traditional distribution heart-lands of the Midlands and South East have helped to increase activity in the North East where large-scale development plots have been identified, economic labour supply is available and the area

benefits from a relatively uncongested motorway network providing access to under capacity east coast ports.

2.2.8. All these factors have led to significant large-scale industrial and distribution development in the region. However with the downturn in the economy over the past 36 months and the oversupply of product, take-up of this speculative built accommodation has been slow with only prime motorway orientated opportunities experiencing any success. There currently remains a substantial supply of property and a considerable pipeline of employment development land in close proximity to the motorway network which presents challenges for second hand accommodation in more secondary locations.

2.2.9. As can be seen from Figure 2.3 below, the make-up of occupier demand for industrial premises has changed over the course of 2010 into 2011. The hopes of a „manufacturing led recovery’ seem to at least be true in the industrial property market with an increase from 18% to 44% of all take-up being used for that purpose in Q1 2011 in comparison with Q1 2010, in part helped by the weak pound. In a similar fashion, retail warehousing has increase from 30% in Q1 2010 to account for 46% of all take-up in Q1 2011. The medium term future for retail warehousing associated with distribution is mixed, however, with retail administrations forecast over the remainder of 2011 likely to impact on the ongoing vitality of distribution market.

Figure 2.3: Sources of industrial demand, Q1 2010 and Q1 2011

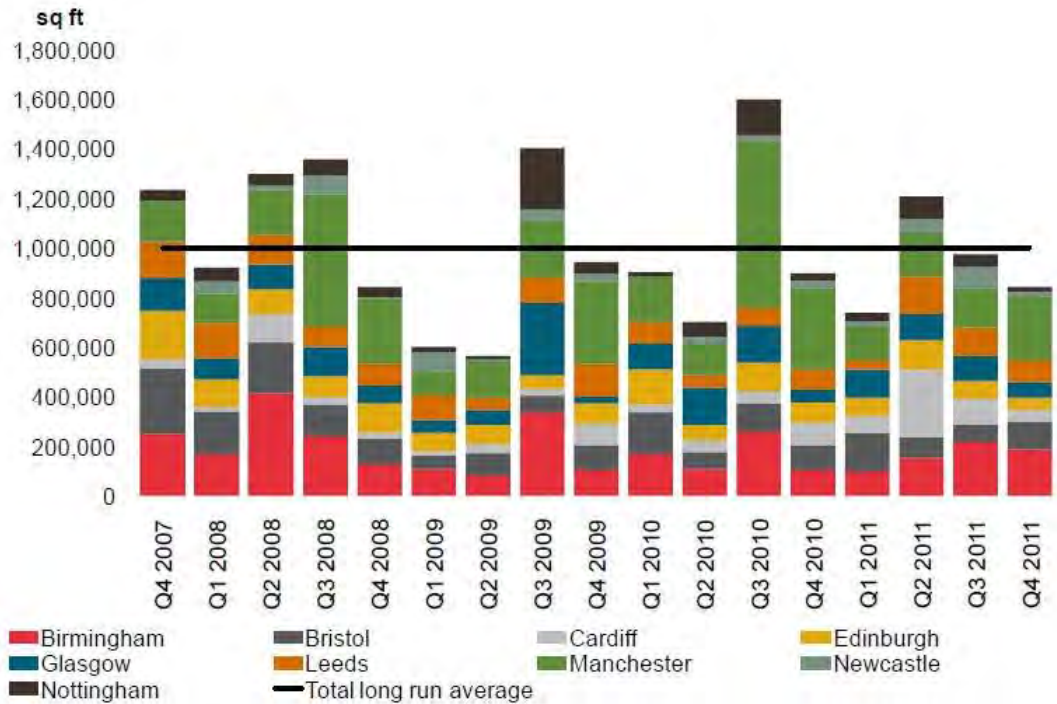


Source: DTZ Research

3 National Office Market Context

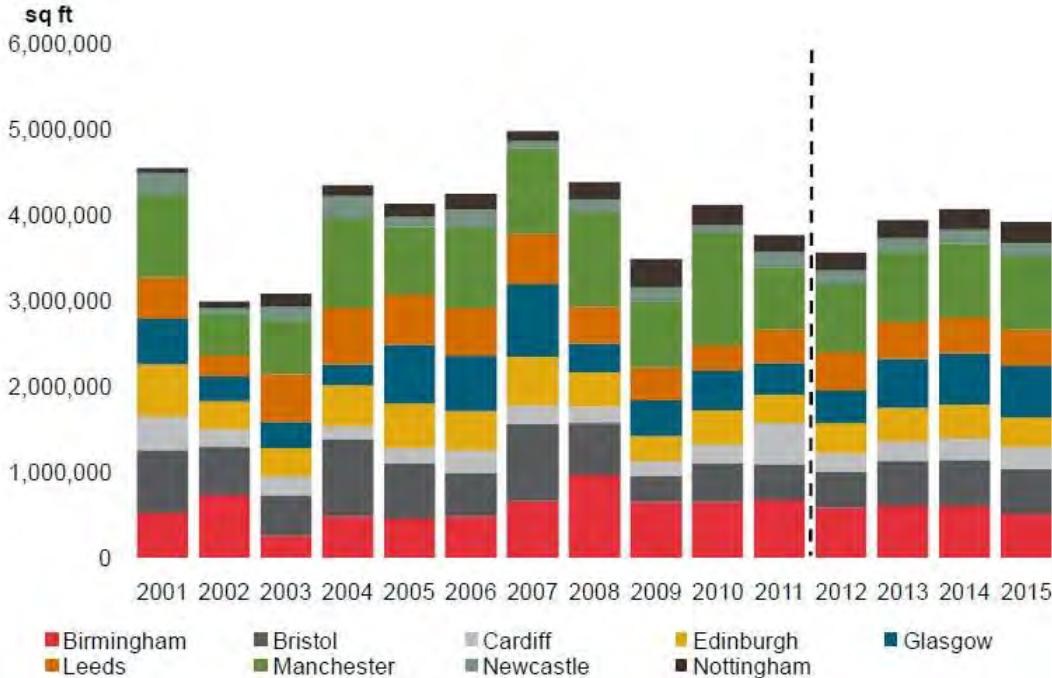
- 3.1. Regional office take-up fell in Q4 2011 and continues to be below the quarterly average. Take-up fell in all but two of the nine regional markets. For the most part this was due to a slow final quarter in an already subdued marketplace. The eurozone crisis and prospect of renewed recession in Europe and in the UK have furthered weakened already fragile sentiment.
- 3.2. Bristol bucked the trend and take-up increased in Q4. Grade A lettings in particular increased with the largest letting of the year. Also Manchester take-up increased. It was the strongest quarter for grade A lettings in 2011. However this is in the context of a much weaker year than 2010, with fewer large grade A deals. Take-up in Cardiff fell to a more typical level after an exceptional Q3. Similarly Leeds take-up fell, but remains above the recent average.
- 3.3. Lease events, consolidation, cost saving and opportunism continue to be the precursors to deals – revealing little in the way of trends for particular sectors and geographies. City centre activity was still focussed towards the smaller end of the market in Q4 where occupiers can make decisions more readily. The majority of deals were for less than 465 sq m (5,000 sq ft).
- 3.4. Polarisation between prime and secondary available space increased in Q4. Manchester prime rents increased but all other markets were unchanged.
- 3.5. Overall regional availability dipped in Q4. Where there was lettings activity it eroded availability since new construction is so limited. Few second hand buildings are now being returned to the market.
- 3.6. An exception is Edinburgh, where Telereal Trillium began marketing the entirety of Argyle House (20,440 sq m / 220,000 sq ft) for sublet, pushing up grade C availability. Also in Glasgow availability increased, driven by key grade B refurbishment schemes that were made available to the market.
- 3.7. The markets continue to be polarised between prime and secondary space. Region-wide, there are 1.8 years of grade A supply at current take-up rates (down from 2.2 years in Q4 2010), whereas grade B supply is at 4.0 years (up from 3.5 years in Q4 2010).
- 3.8. There was little evidence of any underlying change in the dynamics between landlord and tenant in Q4. Typical quoting terms for prime rents and incentives across most markets were unchanged – either backed up by deals or estimated to be unchanged where prime transactions did not take place. The exception is Manchester where prime rents increased to £323 per sq m / £30 per sq ft on the back of a 5,855 sq m (63,000 sq ft) letting to KPMG.

Figure 3.1 Regional office quarterly take-up: cities



Source: DTZ Research

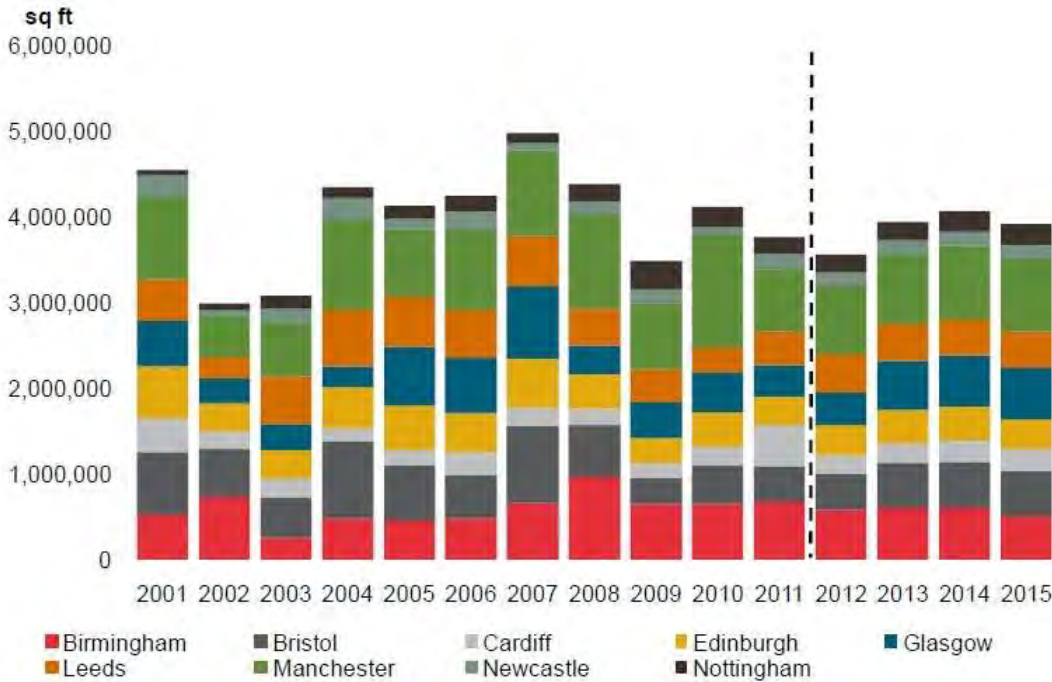
Figure 3.2 Regional office annual take-up: cities



Source: DTZ Research

- 3.9. Total availability is forecast to fall across all markets over the medium term, but more slowly than the weak development pipeline suggests. Overall regional availability is forecast to fall from 2012 and over the medium term. The development pipeline of new space is limited.
- 3.10. Major schemes known to be going ahead:
 - 32,515 sq m (350,000 sq ft) to be delivered in late this year at 2 Snow Hill, Birmingham, the majority of which is pre-let to Wragge and Co.
 - J R Smart is expected to deliver a speculative 6,970 sq m (75,000 sq ft) scheme at Capital Quarter on Tyndall Street, Cardiff this year
 - Atria, a 17,745 sq m (191,000 sq ft) speculative office development on Morrison Street, Edinburgh, planned to be delivered in Q1 2013
 - A 16,720 sq m (180,000 sq ft) speculative scheme expected in 2013 at the former Castlemore site on St Vincent Street, Glasgow
 - 1 St Peter's Square will deliver 25,085 sq m (270,000 sq ft) in Manchester in 2013
- 3.11. The fall in total availability is expected to be slower than the weak pipeline suggests due to a relatively low proportion of new entrants or expansions expected in the near term.

Figure 3.3 Regional office availability: cities



Source: DTZ Research

- 3.12. Grade A availability should still fall relatively quickly and reduce prime incentives initially before prime headline rents rise in 2013. The current phase of the lease event cycle for most markets and number of large requirements satisfied in 2010 and, to a lesser extent, 2011 means that annual take-up for the UK regions as a whole is forecast to be weaker in 2012 than 2011.
- 3.13. There are, however, a number of markets where 2012 take-up is forecast to be greater than 2011. There is a spate of lease expiries in Edinburgh over 2014-16, which could lead to some incumbent occupiers signing pre-lets or relocating early to secure preferred buildings. Annual take-up is forecast to pick up in Manchester in 2012 following a dip in 2011 that was in part caused by a glut of

deals in 2010. Leeds also has an improving requirements volume. However Leeds take-up in 2012 is still forecast to be below the annual average.

- 3.14. As private sector occupiers continue to upgrade to better quality and more efficient space, well located grade A availability is likely to fall back more quickly. This will begin to reduce prime incentives initially before prime headline rents rise in 2013.

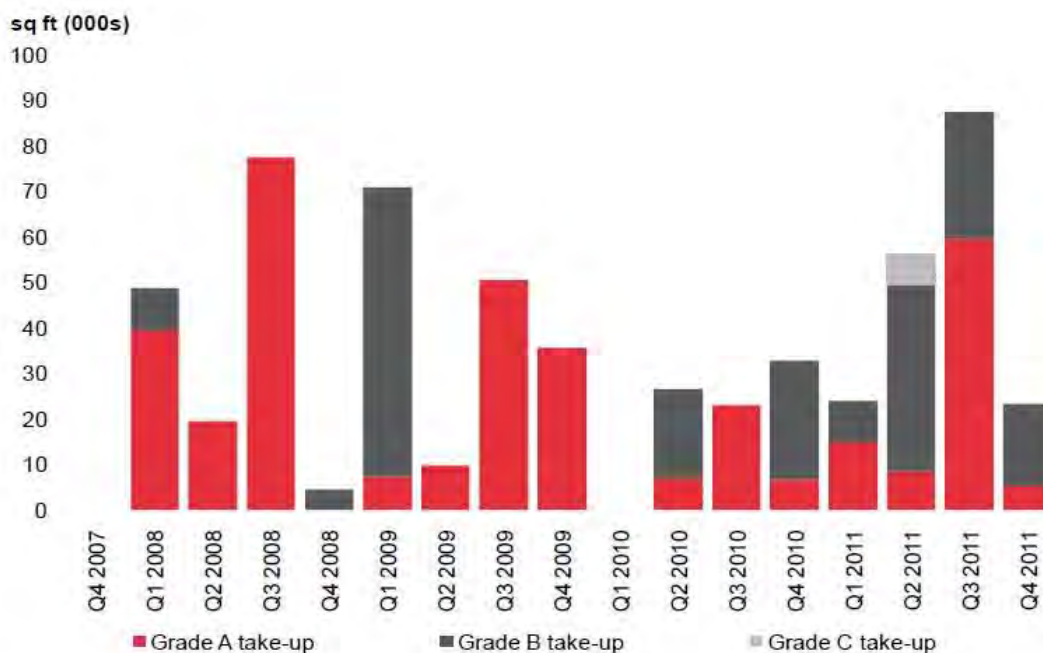
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4 Newcastle Market

4.1 Overview

- 4.1.1. Both the individual size and overall volume of deals in Newcastle city centre declined in Q4 2011 with office lettings totalling 2,140 sq m (23,000 sq ft). However this follows an unusually strong quarter, mainly as a result of the 3,440 sq m (37,000 sq ft) BSkyB letting at Wellbar Central.
- 4.1.2. The largest city centre deal was for 650 sq m (7,000 sq ft) of grade B space to software provider JHC at St Nicholas Street. Avanta Enterprise Ltd also took 465 sq m (5,000 sq ft) of grade B space. The remainder of city centre activity consisted of sub-465 sq m (5,000 sq ft) lettings primarily driven by lease events.

Figure 4.1 Quarterly take-up by grade

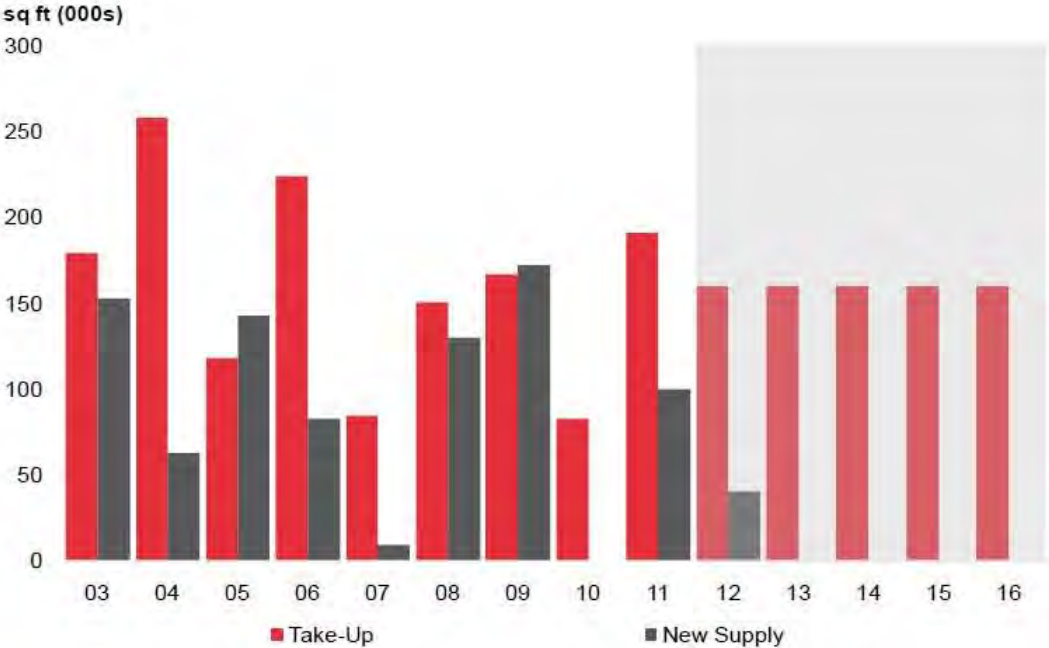


Source: DTZ Research

- 4.1.3. Tenants remain cautious in the current economic environment, the majority are focussing on total cost minimisation rather than taking advantage of the current market to seek out discounted better quality space.
- 4.1.4. Landlords with available capital have been able to divide vacant floors into smaller suites which are proving easier to let in the current market. For example, two small suites fitted out to a high standard were let at City Quadrant in Q4 for £215 per sq m (£20 per sq ft). There has been some inward movement into Newcastle from off shore companies relocating from Aberdeen. The primary reason cited is the abundance of suitably skilled staff in Newcastle. One such example is ASP Shipping, which took 232 sq m (2,500 sq ft) of grade A space at Quayside House in the city centre.
- 4.1.5. The out of town market experienced more demand than the city centre in terms of both the individual size and overall number of transactions. The most prominent lettings were two large grade A call centre deals - Accenture took 2,880 sq m (31,000 sq ft) at Cobalt Business Park and Utility Wise took 3,716 sq m (40,000 sq ft) at Market Dock (outside of Newcastle City Council administrative border).

- 4.1.6. City centre availability continued to fall in Q4, driven by a reduction in grade B space following the quarter's lettings. There were no refurbishment completions or new developments.
- 4.1.7. This leaves annual take up in 2011 at over double of that experienced in 2010 and the highest experienced since 2006. This is also in excess of the five year average; however take-up is forecast to fall slightly in 2012.
- 4.1.8. The 5 year take-up is 13,715 sq m (147,628 sq ft) on current availability of 74,464 sq m (801,532 sq ft). This represents approximately 5.43 years supply. The development pipeline at the moment is pretty much only Stephenson's Quarter (3,716 sq m / 40,000 sq ft) and take-up is forecast to stay at in or around the 5 year average. It is also worth pointing out that take-up is very much to be focussed on quality stock. Much of the availability is secondary, has been vacant for a long time and will continue to be vacant throughout much of the plan period.

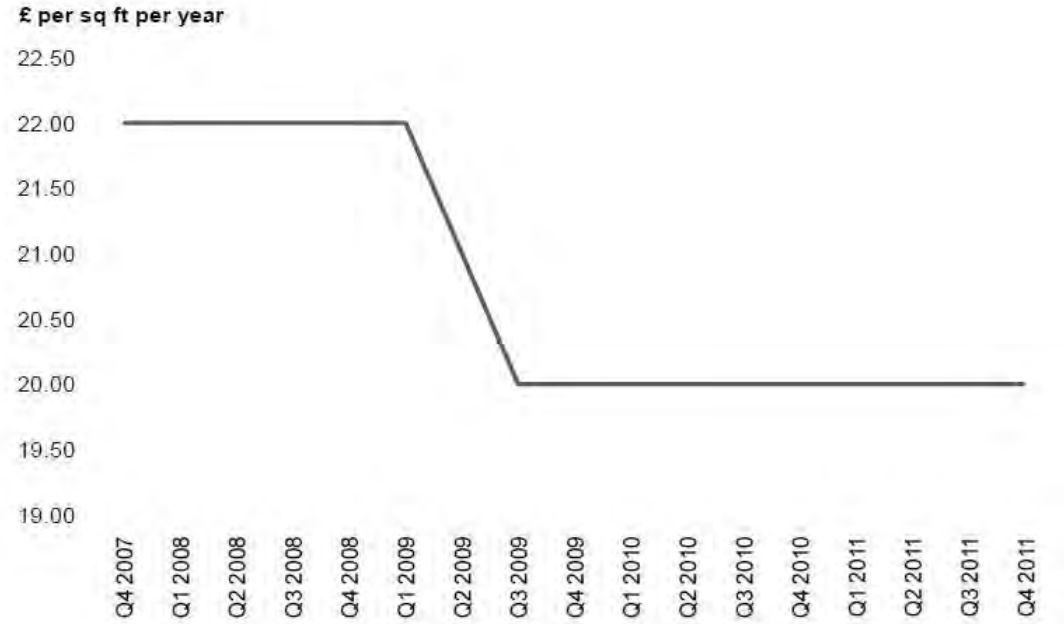
Figure 4.2 Annual take-up and new supply, 2003-16



Source: DTZ Research

- 4.1.9. Prime rents remained unchanged at £215 per sq m (£20 per sq ft), evidenced by the two grade A lettings at City Quadrant. There are several current requirements from the accounting sector. These include a potential expansion for Ernst & Young. In addition UNW is seeking to upsize from 650 sq m (7,000 sq ft) to 1,022 sq m (11,000 sq ft) including improved office space.

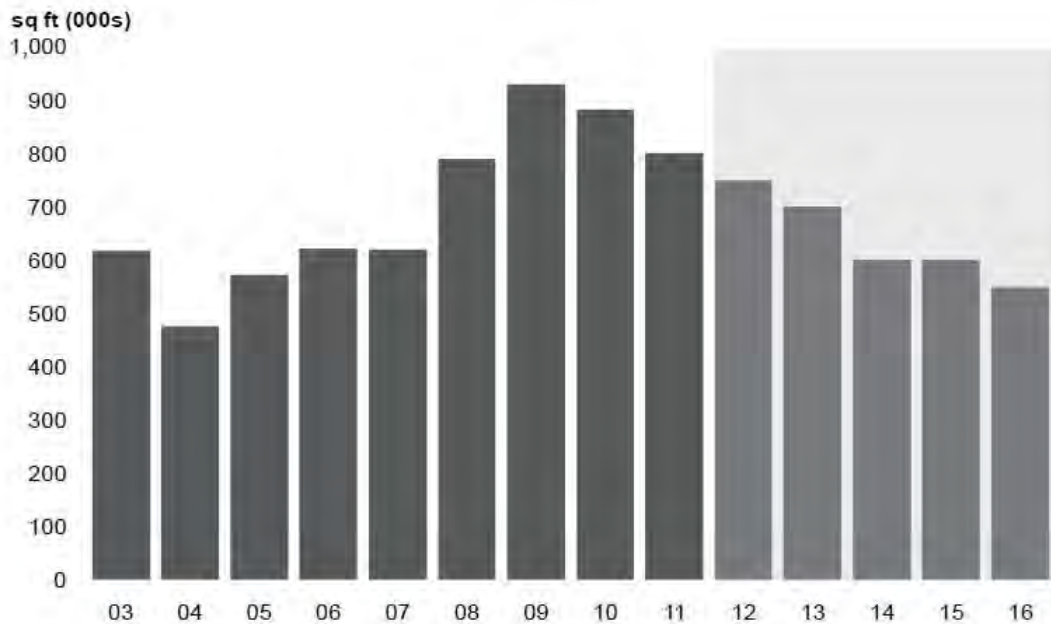
Figure 4.3 Prime headline rent



Source: DTZ Research

- 4.1.10. Other key requirements include Scott Logic, a financial software consultancy, seeking 930 sq m (10,000 sq ft) in the city centre. There are also a number of solicitors, including a rapidly growing personal injury claims solicitor, with immediate office space requirements in Newcastle.
- 4.1.11. Nevertheless the out of town former Enterprise Zones are set to continue to achieve a higher volume of occupier transactions than the city centre in 2012, given the amount of new grade A space available with outstanding incentives on offer there.
- 4.1.12. The peak in city centre availability was reached in 2009 and we anticipate that overall levels will ease back over the forecast period. The city centre development pipeline is virtually empty. There is no office development confirmed as going ahead in 2012 outside of Silverlink’s Stephenson Quarter scheme (3,716 sq m / 40,000 sq ft) subject to achieving a necessary pre-let. This will put pressure on existing supply, incentive packages and eventually increase the attractiveness of the employment sites available in the short term.

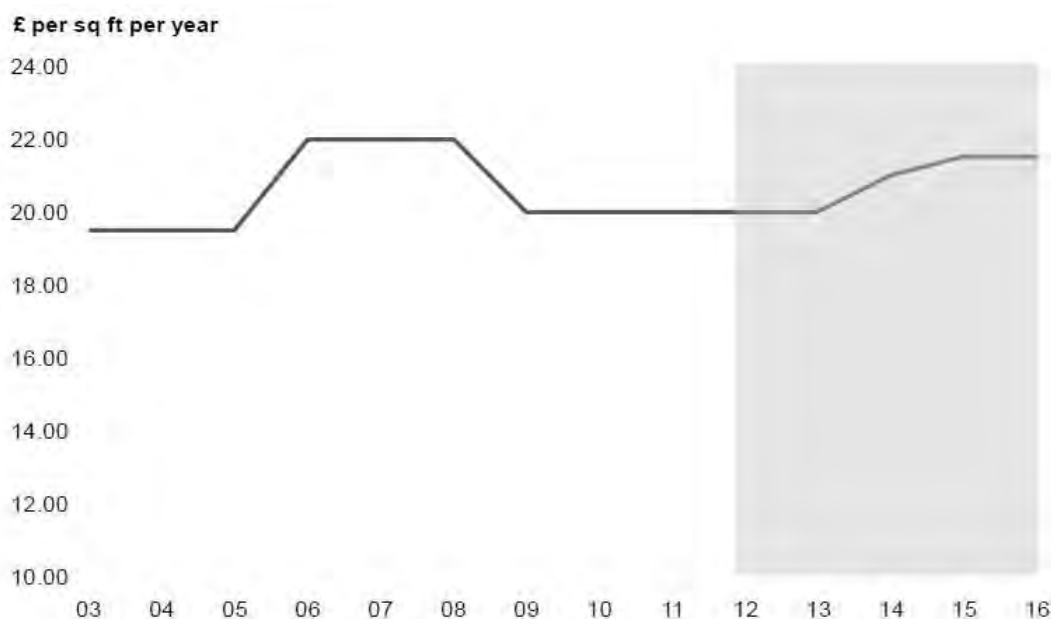
Figure 4.4 Availability, 2003-16



Source: DTZ Research

- 4.1.13. There is a mandate to significantly rationalise the 278,700 sq m (3,000,000 sq ft) government estate around the region. However, the process will be staggered so any fall in availability over the medium term will only be gradual.
- 4.1.14. Most large corporate occupiers have essentially completed their downsizing. However, occasional relocations and rationalisation can be expected over the next couple of years as and when lease events occur, which will boost take-up figures.
- 4.1.15. Prime city centre headline rents are likely to remain at £215 per sq m (£20 per sq ft) until 2012 before rising to £226 per sq m (£21 per sq ft) in 2014, though incentives are likely to already have peaked.

Figure 4.5 Prime headline rent, 2003-16



Source: DTZ Research

Table 4.1 – 2011 transactions¹

Address	Date	Sq ft	Sq m	Tenant	Sector
30/31 Long Row, Market Dock	Q4 2011	40,400	3,753	Utility Wise	Utilities
Cobalt 15A, Cobalt Businss Park	Q4 2011	30,515	2,835	Accenture	Management Consultants
Cobalt 1, Cobalt Business Park	Q4 2011	22,000	2,044	HP	IT
Part 3rd Floor, St Nicholas Street	Q4 2011	6,791	631	JHC	Software
Floors 1, 2 & 3 Wellbar Central	Q3 2011	36,518	3,393	BSkyB	Call Centre
Part 5th floor, Central Sq South	Q3 2011	8,020	745	Qubic Accountants	Accounting
Part 3rd floor, Baron House, Neville Street	Q3 2011	5,791	538	Ingeus	Welfare to Work
Part 3rd floor, Newcastle Technopole	Q3 2011	5,436	505	ASDA	Retail
1 Centre Parkway	Q2 2011	10,000	929	Scott Logic	Professional
176, New Bridge Street	Q2 2011	30,000	2,787	NECA	Public
Central Square, Forth Street	Q1 2011	7,300	678	GVA Grimley	Property
Merchant Court, Monkton South Business Park	Q1 2011	16,000	1,486	Frank Haslam Milan	Housing
Q15, Quorum Business Park	Q1 2011	10,450	971	Home Group	Housing association

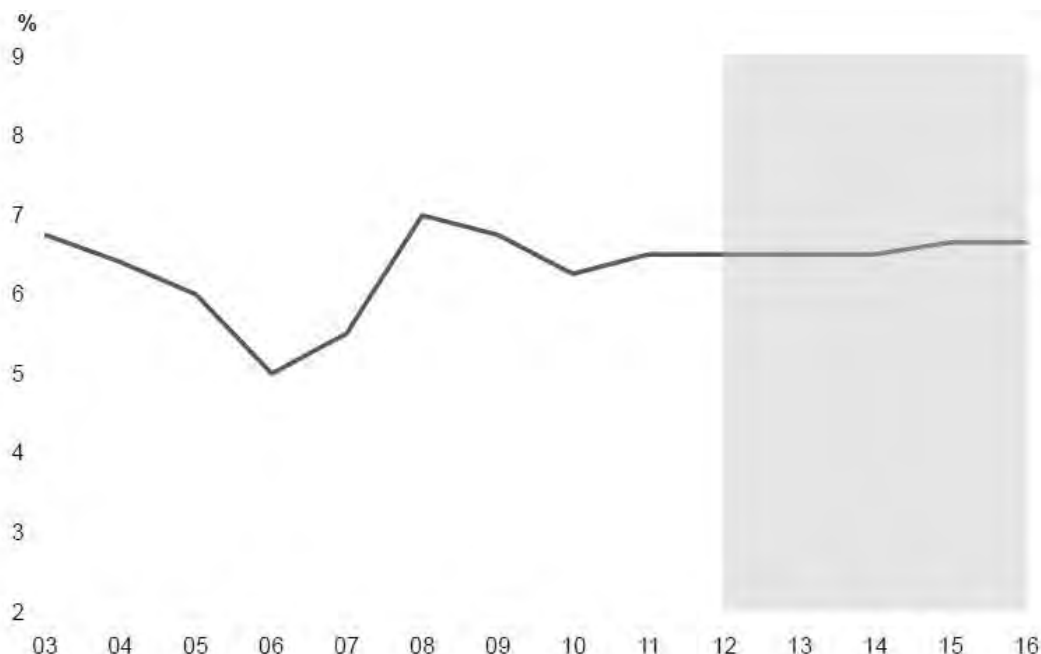
Source: DTZ Research

¹ Some of these deals lie outside of the Newcastle City Council administrative border

4.2 Investor Appetite

- 4.2.1. Investor sentiment worsened over 2011 in reaction to the escalating eurozone crisis and anticipated disruption to capital flows, as well as the prospects of a renewed domestic recession. A lack of prime transactions meant we maintained estimated prime office yields in Newcastle at 6.5% for Q4.
- 4.2.2. UK retail fund net flows turned negative in September 2011, taking the pressure off fund managers to invest. UK pension funds have become more cautious towards regional lot sizes greater than £50m.
- 4.2.3. Potential buyers have become more sensitive to the length of unexpired income. An otherwise good quality property in a good location with only a few years left on the lease could be disregarded by the institutions. Many of the smaller lot size properties (i.e. around £4m) are particularly affected because they are also overlooked by overseas investors and all but the smallest opportunistic investors.
- 4.2.4. Overseas investors, particularly the German funds, are still successfully targeting the larger prime assets in the major regional markets where there are higher income yields on offer than properties in the South East.
- 4.2.5. There is a range of opportunistic buyers and well-capitalised property companies targeting geared returns of 15-20%. Debt-backed buyers tend to be the larger organisations that borrow on a group wide facility basis rather than by asset. However on a per asset basis the gearing ratio is unlikely to be greater than 50% at present.
- 4.2.6. There continues to be a significant mismatch between buyer and seller price expectations, which is limiting transactions. Deals are being achieved where banks have pressurised the vendor to reduce their gearing and rebalance portfolios.
- 4.2.7. The number of insolvency sales continues to increase, although the banks will delay disposals to undertake asset management first. Interest is asset-specific, being reliant on potential to add value, and so some poorer assets remain unsold.

Figure 4.6 Prime office yields, 2003-16



Source: DTZ Research

4.2.8. Prime yields are expected to remain broadly stable but secondary yields are expected to drift out further in 2012. Major influences for 2012 will be bank-led sales and the continued erosion of unexpired terms, which points to more pragmatism on the part of vendors with respect to pricing.

Table 4.2 – 2011 Major Investment Transactions ²

Address	Purchaser	Vendor	Date	Price (M)	Initial yield
The Quadrant, Cobalt	Legal and General	Merchant Place	Q4 2011	£24.2	5.85% / 6.25%

Source: DTZ Research

4.3 Conclusion

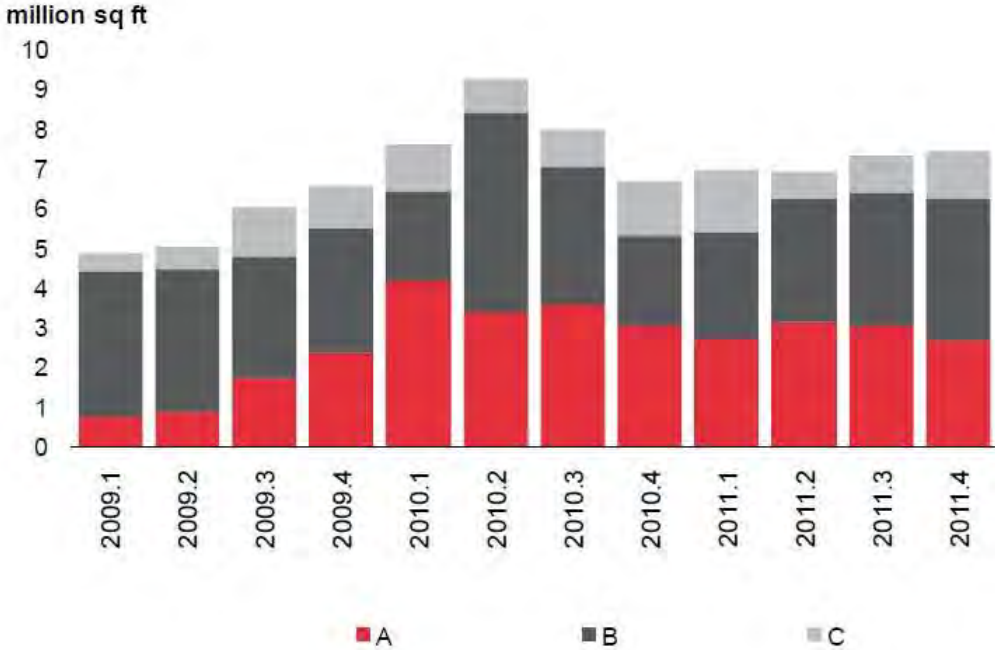
- 4.3.1. Newcastle has both a strong City Centre and out of town markets. Rents have remained relatively robust despite the economic climate and good quality stock has been occupied quickly. Rents are expected to stay around the £215 per sq m (£20 per sq. ft) mark until 2013 as the small number of completed schemes between 2010 and 2012 should see demand catching up with supply before additional stock can be delivered.
- 4.3.2. DTZ do not see incentives increasing beyond the current levels for the reasons explained above. We expect take-up over the coming years to drop slightly from the level experience in 2011 to approximately 13,935 sq m (150,000 sq ft), in line with long term trends.
- 4.3.3. Newcastle City Council should endeavour to ensure a strategic portfolio of sites within the City Centre and outside it. We believe that Cobalt and Quorum will satisfy the demand for out of town space of the short to medium term, but that an element of Newcastle Airport has the potential to follow these as they begin to be entirely developed out.

² Outside of Newcastle City Council administrative border

5 National Industrial Market Context

5.1. UK take-up was 692,105 sq m (7.45m sq ft) in Q4 2011. This is slightly higher than the 682,810 sq m (7.35m sq ft) recorded in Q3 and is the highest quarterly total for over a year. An increase in the number of transactions accounted for the rise in activity. 58 transactions were recorded in Q4 compared with 54 in Q3. This is the highest number of deals for the past 3 years.

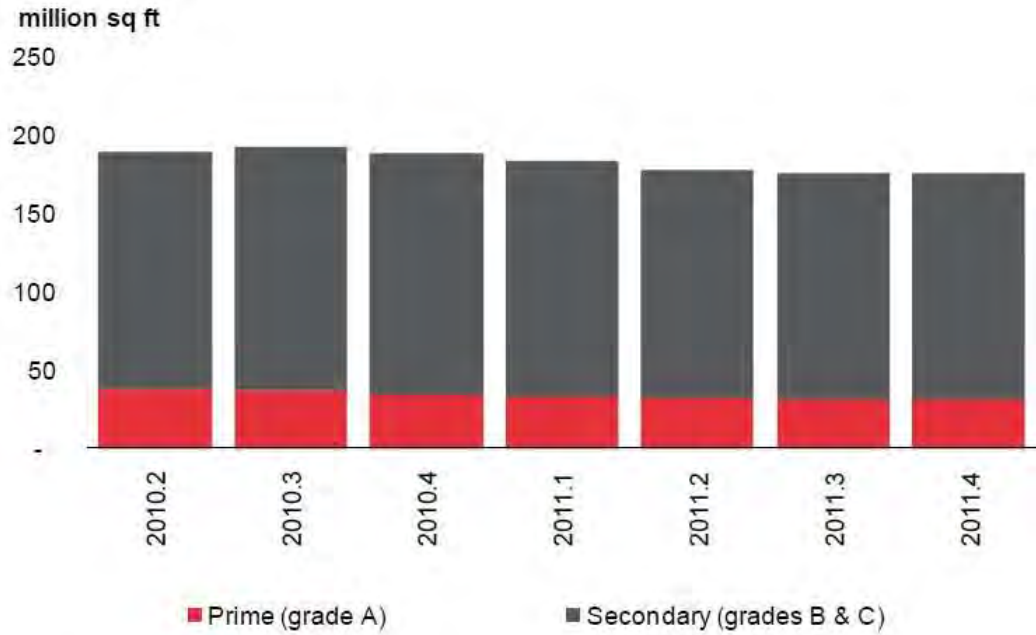
Figure 5.1 Quarterly UK take-up by grade



Source: DTZ Research

- 5.2. The rise in transactions coincided with a fall in the average deal size to 11,940 sq m (128,500 sq ft) from 12,635 sq m (136,000 sq ft) in Q3. This is the third successive fall in the last three quarters and is the lowest average deal size since Q1 2009. This takes the 2011 total to nearly 2.69m sq m (29m sq ft). This is a fall from the 2.94m sq m (31.6m sq ft) recorded in 2010 but is nearly 5% higher than the long-term average.
- 5.3. Between 2010 and 2011 the profile of occupiers has shifted. Manufacturing increased from 20% to 33% while retail has increased from 48% to 49%. Overall their collective share of industrial demand has increased from 68% to 82%. Supply chain providers have fallen from 23% to 10%. The shift to manufacturing is further emphasised by the reduction in average deal size from 15,795 sq m (170,000 sq ft) in 2010 to 13,935 sq m (150,000 sq ft) in 2011. Manufacturers tend to occupy smaller units than retail or supply chain providers. Continually strong take-up has resulted in a fall in availability for the fifth successive quarter due to positive net absorption. This is a trend repeated across the UK. The drop in overall availability has been limited by a large number of secondary units coming to the market. An example of this includes Morrison’s returning 57,600 sq m (620,000 sq ft) in the South West.

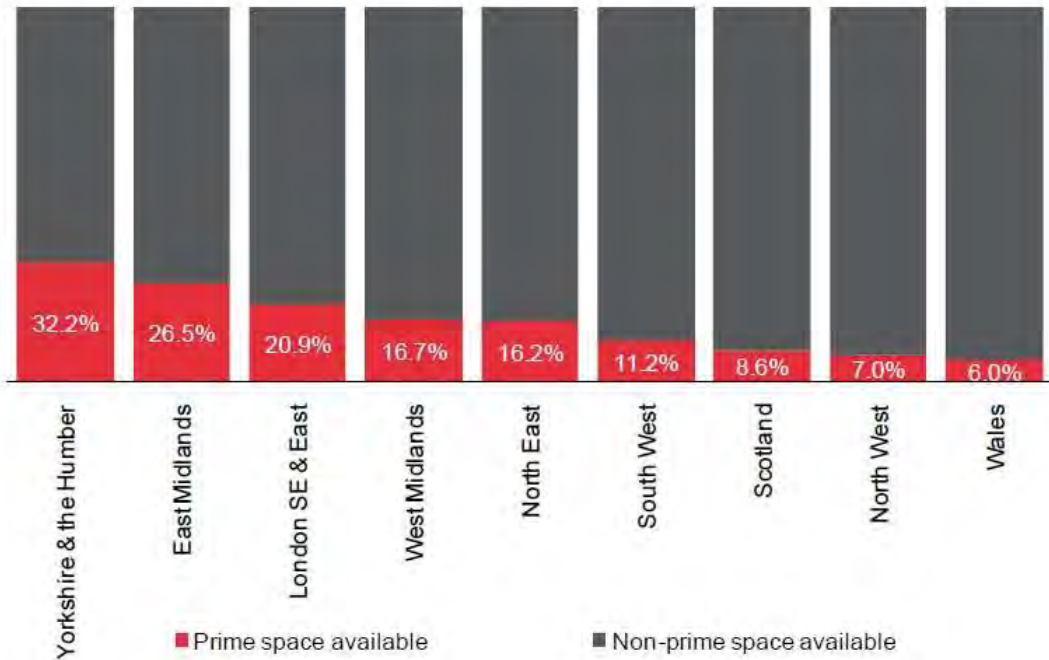
Figure 5.2 Quarterly UK availability by grade



Source: DTZ Research

5.4. Prime stock remains low and some regions are reporting a severe shortage. Prime availability ratios fell from Q3 for every region except the West Midlands. New space is only coming to the market in the form of pre-lets and build-to-suit deals as speculative development remains unfeasible.

Figure 5.3 Regional proportions of total available prime space



Source: DTZ Research

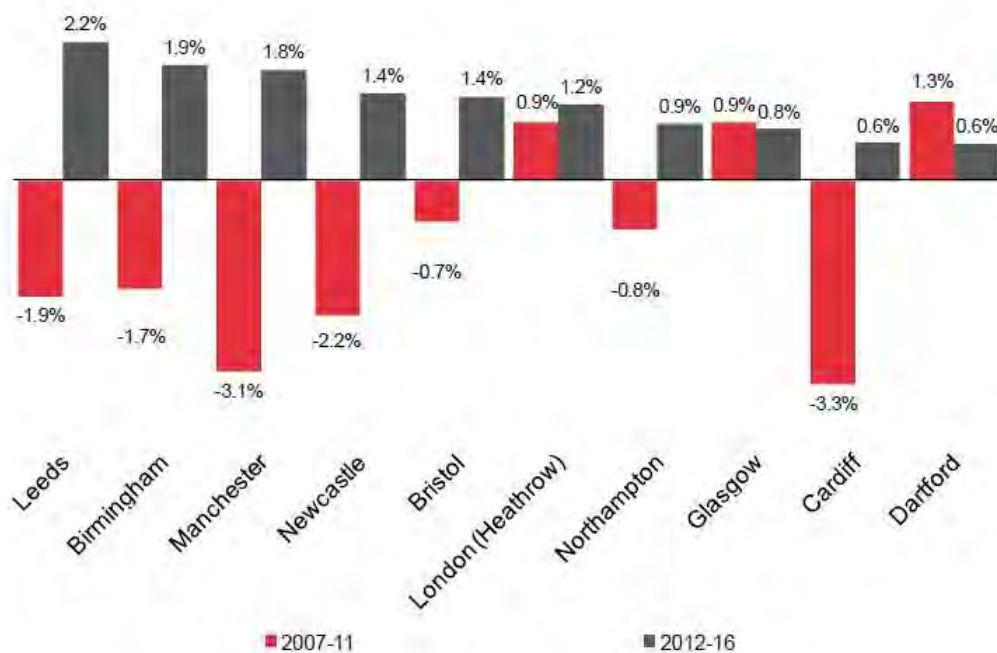
5.5. Rental levels remained flat in Q4. Although agents expect incentives to harden on prime stock, actual observations of this in the market is limited. The reasons for this are two-fold:

- Firstly limited prime stock is restricting the number of transactions. Tenants are looking to good quality secondary stock or build-to-suit deals to satisfy their requirements. Incentives on build-to-suit deals inherently contain fewer incentives due to the unique nature of the deal.
- Secondly, the current economic outlook contains significant downside risks. Associated risks in the occupational market are restricting any shift in the balance of power away from the tenants. The shortage of prime space reported in Q3 has been further exacerbated this quarter. Providing there are no further shocks to the economic recovery the continued shortage of space will increase the probability of rental growth in the near future. While there remains little appreciable rental movement speculative development remains unfeasible as rents and yields fail to generate the right level of value for financial viability.

5.6. Rental growth forecasts have been revised down from Q3 in response to deteriorating economic conditions. Industrial rents continue to lag behind both office and retail property in the rental cycle. However they are expected to perform strongly over the next five years after contracting during the 2007-11 period.

5.7. Industrial rental growth forecasts have been revised from Q3. In light of a choppy economic recovery with considerable downside risks the growth peak in 2013 has been revised down to 2.2% from 2.5%. Some of this growth has been pushed into the following years, making the post 2013 slowdown a shallower movement towards 0.3% growth in 2016.

Figure 5.4 DTZ prime regional industrial rental growth



Source: DTZ Research

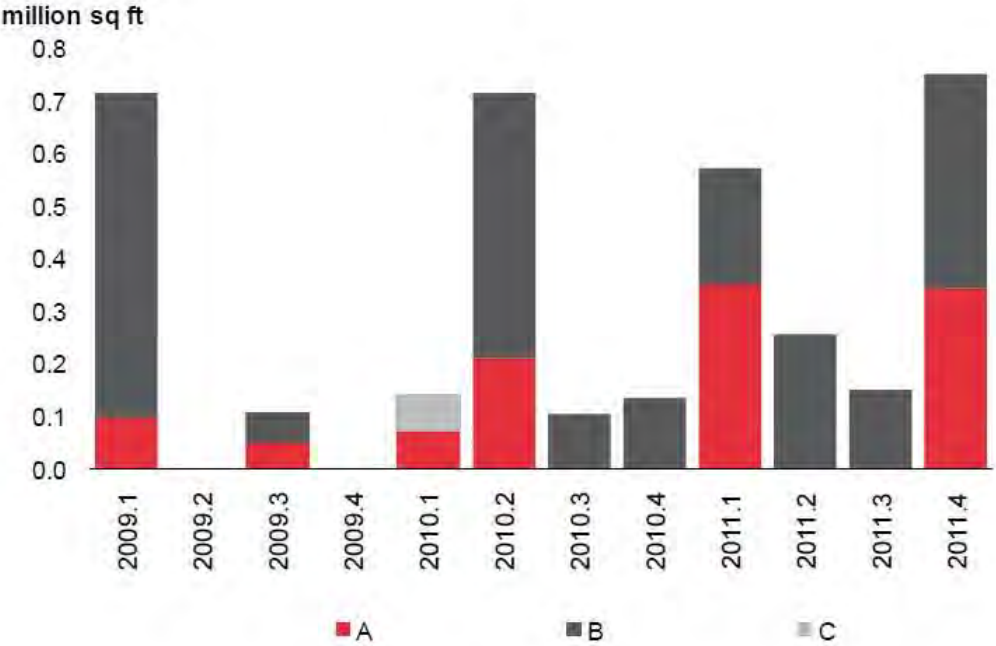
6 Newcastle Industrial Market Context

6.1 Overview

6.1.1. During the 1980s and 1990s Newcastle moved away from having an industry dominated economy towards one that is more service orientated. As could be expected, this has had an adverse impact on demand for industrial and warehouse space. Warehouse space has seen better fortunes, with retail distribution filling demand lost from more traditional areas. Demand for industrial space, however, has continued its decline, has frequently being redeveloped into more profitable uses as residential land values have increased above even tenanted secondary and tertiary industrial properties. During the last property cycle, such challenges have put pressure on the need to have a robust portfolio of employment land to adapt to these challenges.

6.1.2. Q4 take-up was 69,675 sq m (750,000 sq ft), over double the long-term quarterly average. The yearly total of 157,935 sq m (1.7m sq ft) is also 50% higher than the long-term yearly average. DTS Clipper committed to 32,145 sq m (346,000 sq ft) of new space in Billingham for a distribution hub for George at Asda. This will be an expansionary move from 13,935 sq m (150,000 sq ft) of space in Darlington, when they take occupation in Q3 2012.

Figure 6.1 North East take-up by grade



Source: DTZ Research

6.1.3. Availability of grade A space of all sizes is limited. There are only five new buildings over 4,645 sq m (50,000 sq ft), totalling 52,025 sq m (560,000 sq ft). A single unit at Chester le Street represents 46% of this supply. Demand for small to medium sized units was restricted during Q3 and Q4 resulting in headline rents falling marginally. Nissan will hear this month whether they have won the replacement Note contract. If successful, this could trigger demand for 74,320 sq m (800,000 sq ft) for Nissan and it's Tier 1 suppliers

6.1.4. It is important to note that the majority of demand for industrial space in the region is focussed in the Gateshead area. That said, Team Valley Trading Estate, the most popular regional employment site, is now almost entirely built out. The limiting of new supply in this area may lead to opportunities in Newcastle and, in particular, Newburn Riverside which benefits from a similar good location near the A1 and can offer substantial space for a wide of office and industrial users. Below is a list of take up and availability of industrial premises in the region.

Table 6.1 – Industrial take up and availability 2011

North East	Q4 2010	Q1 2011	Q2 2011	Q3 2011	Q4 2011
Take up sq m	12,463	20,850	23,806	14,126	69,976
Take up sq ft	134,147	224,427	256,249	152,057	753,219
Availability sq m	671,977	742,713	786,426	785,593	752,428
Availability sq ft	7,233,157	7,994,568	8,465,094	8,456,122	8,099,131
Prime Rents sq m	£53.82	£53.82	£53.82	£53.82	£52.74
Prime Rents sq ft	£5.00	£5.00	£5.00	£5.00	£4.90

Source: DTZ Research

6.1.5. The 5 year take-up is 68,144 sq m (733,498 sq ft) on current availability of 752,428 sq m (8,099,131 sq ft). This represents approximately 11 years supply.

6.1.6. The diminishing supply of new properties is shoring up prime rental values to a certain extent. That said, rents for secondary properties continue to fall as lease events see occupiers taking advantage of the current economic conditions by aggressively negotiating deals on better quality stock.

6.1.7. Finally, deals on tertiary accommodation are becoming ever more competitive with landlords keen to offset the rating liability and security risks of vacant buildings.

6.2 Conclusion

6.2.1. Despite policy pressures to change the employment profile of the study area to one focussed on services, general industrial and distribution development still has a large part to play in the future of the local economy due to the proximity to the airport, major arterial roads and the East Coast main line. This appears to be reflected in the current short term Employment Land portfolio for general industrial use which is substantially less than for mixed / office use despite its lower density of space-employment ratio. When considering how to best place Newcastle in order to maximise employment outputs from any future economic recovery, it is important to have a portfolio flexible enough to allow development of property in all possible sectors.

6.2.2. It is also important to note that, while Gateshead has traditionally been the first choice for industrial occupiers, Team Valley Trading Estate- the most popular regional employment site, is now almost entirely built out. This will limit the supply of new stock in the area and, should Newcastle be able to offer a site with both immediate and long term potential, there could be a possibility for the next major industrial park of regional significance to be located north of the Tyne.

7 Summary of Economic and Property Market Overview

- 7.1. The key issue affecting local authorities when compiling their Employment Land portfolios at present is the uncertainty over the economic future of the UK as a whole. Economic growth in both the UK and the study area over the past decade has been largely reliant upon the expansion of the financial and business services sector. While growth in these sectors has been stagnant over the past few years over the long term these are once again set to grow. We believe that two areas identified for growth, renewable energy and off-shore engineering, could be planned for in terms of employment land, but beyond that sector-specific forecasting loses certainty. In addition to this, manufactures such as Nissan offer real potential for the entire region should they be allocated the contracts for the production of new models. As such, the most important characteristic for any portfolio of employment land is flexibility to ensure sites within a region are fit for purpose.
- 7.2. There is a strong level of demand for City Centre office stock. Newcastle has cemented its position as the most prestigious location for occupiers looking for space within the North East and, as such, this is reflected in relatively high rental levels. Despite the downturn, high quality developments such as Downing Plaza show that good product can still attract demand.
- 7.3. Newcastle benefits from an incredibly healthy out of town office market. The legacy of the Enterprise Zones, and carefully planned developments encompassing good traffic links to the road network and the Metro, has led to the establishment of three very strong and distinct out of town offers. Quorum and Cobalt Business Park (although outside of the city boundary) are all bucking the declining popularity of out of town office parks seen elsewhere in the country and we expect this trend to continue in the medium term, with Newcastle Great Park providing an opportunity over the long term.
- 7.4. The City is in a strong location for industrial use on A1 corridor and, although it is currently seen as second best to Gateshead, there are signs that this may be changing. The building out of Team Valley Trading Estate which has effectively run out of room to expand, may lead for opportunities in the short to medium term for Newcastle as occupiers look at a wider area for modern industrial stock. The current portfolio lacks the quantity of employment land supply for industrial use available in the short term. While there is likely to be little interest in developing out these sites in the short term, the economic climate is likely to push back timescales on the delivery of the majority of the portfolio.
- 7.5. Since 2008, headline rents have been relatively robust in the face of weak occupier demand. While headline rents have remained relatively high, the net effective rent factoring in incentives has been steadily falling across all sectors. Over the medium term this trend is set to reverse as, with demand remaining steady and availability of good product decreasing, incentive packages start to reduce and, in due course, rents once again start to rise.

8 Historical Take-up of Employment Land

- 8.1. This section considers the likely level of gross demand for new floor space in Newcastle, drawing on data provided by Newcastle City Council to assess the annual completion of new office, industrial and warehousing space from 1994-2011. Therefore on an annual basis a certain amount of floor space has been built to meet the needs of businesses that want to move or expand within or into the area.
- 8.2. Using the data provided by Newcastle City Council, Table 8.1 outlines average completion rates over five year periods for office, industrial and storage space between 1994 and 2011.

Table 8.1: Average Floor Space Completion in Newcastle, 1994-2011

Floorspace (Sq M)					Total Completions
Sector	1994 - 1998	1999 - 2003	2004 - 2008	2009 - 2011	
Warehousing	9,400	6,900	5,800	1,523	23,623
Office	11,700	40,100	52,000	49,327	153,127
Industrial	12,600	8,900	7,700	23,642	52,842
Total	33,700	55,900	65,500	30,446	155,100

Source: Newcastle City Council AMR

- 8.3. Historical data for Newcastle highlights the declining new build of industrial space, which for 2004-2008 averaged 7,700 sq. m per year. However, 2009 – 2011 data shows a drastic increase made up by 2 substantial completions at Neptune Yard and Kingfisher Boulevard. This compares to annual figures of 12,600 sq. m between 1994 and 1998. Warehousing new build has also seen a long-term decline, from 9,400 sq. m per year from 1994-1998 down to 5,800 sq. m between 2004 and 2008 and then 1,523 between 2009 – 2011.
- 8.4. Office new build in Newcastle has increased significantly since 1994, rising from 11,700 sq. m per year between 1994 and 1998, 52,000 sq. m per year between 2004 and 2008 and then 49,327 between 2009 - 2011. However, it should be noted that using new build to assess gross demand takes no account of the amount of second-hand floor space that is made available during a period, as a result of business relocations, closures and consolidation. For example, a number of the larger office schemes developed in Newcastle since 2003 have come in the public sector or have been relocations from existing sites, including 78,000 sq. m of space for the DSS (at Benton Park View) in 2003, 40,000 sq. m of space for Sage in 2004 and 30,000 sq. m for the Inland Revenue in 2005.
- 8.5. Since 2005, the annual space for office new build in Newcastle has fallen back – for example, in 2008 it was 30,000 sq. m. This trend is in line with ONS data on total floor space in the area, which suggest that the amount of total office floor space in the area peaked in 2004, before dropping slightly and remaining fairly static up to 2008 before dropping off slightly to 2011 during the recession.
- 8.6. By looking at trends over a particular timeframe, these annual rates of new build provide a useful indication of the likely levels of new build expected to accommodate all requirements, including new businesses, relocations and expansions. However, it does not necessarily directly reflect the net change in the amount of floor space required once you have taken into account space that is already occupied or available.
- 8.7. From a strategic context, in order to assess whether more, or less, employment land is required in the future it is important to assess the net level of demand for land – taking into account the fact that some sectors of the economy may require less land in the future. Gross demand can be used to assess the requirement for frictional demand, i.e. the volume of land to accommodate the movement of businesses into and out of the area.

8.8. The land requirements resulting from the average completions can be calculated using the same methodology as the forecasts. Therefore the figures in Table 8.1 would be as follows:

Table 8.2 – Average annual land take-up extrapolated from completions

Land Change (Ha)					Total Completions
Sector	1994 - 1998	1999 - 2003	2004 - 2008	2009 - 2011	
Warehousing	2	2	1	0	6
Office	1	5	7	6	19
Industrial	3	2	2	6	13
Total	7	9	10	12	37

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9 Employment Forecast Scenarios

9.1 Future Labour Supply in Newcastle

9.1.1 It is also useful to assess trends in Newcastle’s future labour supply and we have done this by applying the latest estimates of economic activity in Newcastle to ONS population projections³ of working age people (15-64) for the period up to 2038⁴. This method gives an estimate of the future number of economically active residents (those aged 15-64 based on the projections data) within Newcastle. However, it should be noted that the ONS population projections are mathematically based (and produced looking at past trends) and do not take into account issues such as legislation and environmental change, meaning they should only be used as a proxy for the future supply of labour in the area.

9.1.2 According to the Annual Population Survey, the economic activity rate in Newcastle over the period April 2010 - March 2011 was 70.1%. This was below the England average of 76.5%. We have considered two scenarios (see Table 9.6) for Newcastle:

- Firstly, what the future labour supply will look like if the economic activity rate in Newcastle remains at 70.1%.
- And secondly, what the situation will look like if the area moves in line with the national average of 73.5%.

Table 9.6: Future Labour Supply in Newcastle⁵

Scenario	Labour Force Estimate		Change, 2010-2038	
	2010	2038	No.	%
EA in Newcastle remains at 70.1% up to 2037	139,500	139,980	480	0.34%
EA in Newcastle increases to 79% in 2037	139,500	152,760	13,260	9.51%

Source: DTZ, National Statistics and Annual Population Survey

9.1.3 As with all cities, a significant proportion of the workforce will commute from outside Newcastle’s administrative boundaries – i.e. labour supply will not come from purely within the local area. For example, the 2001 Census shows that (excluding those who both live and work in Newcastle), Newcastle has a net in-flow of approximately 57,000 commuters aged 16-74.

3 The projections used in this report are 2010-based and take the 2010 mid-year population as the starting point for projecting future trends.

4 ONS population projections currently run to 2035. We have therefore extended the time period to 2038 by taking the average annual growth rate towards the end of the projection period (0.3% per year between 2030 and 2035) and applying this to the projections for 2036 - 2038.

5 The population aged 15-64 in Newcastle in 2010 was 199,000. Applying the economic activity rate of 70.1% to this figure gives a labour force estimate of 139,500 in 2010. In 2038, the population aged 15-64 is projected to be 199,690. Applying an EA rate of 70.1% gives a labour force estimate of 139,980.

9.2 Economic Forecast Scenarios

9.1.1. DTZ has modelled the employment forecasts of three scenarios reflecting various different eventualities in the economy. The timeframe modelled covers from April 2010 and extends to two future dates. The first is 2030 which is the end of the Local Development Framework period. The second is 2038 which has been included in the eventuality of the Regional Spatial Strategy being retained. The three scenarios are as follows:

- **Long Term Recovery Scenario:** This scenario factors in the continuing impact of the economic downturn and then looks at the implications in terms of a recovery in the long term for Newcastle – driven by increasing employment in office-based occupations.
- **St Chads Scenario:** This scenario is derived from the Long Term Employment and Demographic Projections prepared by the Policy Research Group (PRG) of Durham Business School / St Chad's College and should be read in conjunction with their report.
- **Cambridge Econometrics Scenario:** This scenario is based on the core data from Cambridge Econometrics for Newcastle.

9.1.2. For each of the scenarios, employment change is analysed by using proxy indicators for the following use classes:

- Offices
- Industrial
- Warehousing.

9.1.3. Under this approach, it has been necessary to make broad assumptions regarding the application of SIC categories to the above land categories. A full breakdown of the sectors used to define offices, warehousing and industrial space is provided in Appendix A, in addition to the employment forecasts for all other sectors in Newcastle for 2010-2038.

10 Future Floor Space and Employment Land Requirements

10.1 Introduction

10.1.1. Forecasts of net change in employment land requirements are produced by converting anticipated employment change into floor space requirements by using estimates of the average amount of floor space occupied per employee and the amount of floor space per hectare of land (i.e. the plot ratio).

10.1.2. In order to translate employment change into demand for employment floor space the change in employment has been translated into a change in the demand for gross internal employment floor space using the Homes and Communities Agency: Employment Densities Guide 2010. This provides an estimate of the gross internal area required per employee by type of development. These densities have been used to help inform the analysis and are as follows:

- Industrial (General Industrial Buildings): gross internal floor space 36 sq. m per employee
- Warehousing (General warehousing): gross internal floor space of 70 sq. m per employee
- Offices (General Offices): gross internal floor space of 12 sq. m per employee.

10.1.3. The estimated change in floor space requirements is translated into employment land requirements using a plot to floor space ratio of 42% for industrial and warehousing and a plot to floor space ratio of 80% for office uses. These are average plot ratios and they can vary significantly, with some office developments achieving a plot ratio of well over 100% – especially in the city centre.

10.1.4. The analysis below includes total change in office, industrial and warehousing space, However, it is more important to consider individual change by sector type.

10.2 Long Term Recovery Scenario

Table 10.1 – Employment Change

Employment Change (1,000) Sector	Change 2010 - 2030				Change 2010 - 2038		
	2010	2030 No	%		2038 No	%	
Warehousing	3.6	3.6	0	0.00%	3.7	0.1	2.8%
Office	45.7	50.5	4.8	10.50%	54.7	9	19.7%
Industrial	12	7.7	-4.3	-35.83%	7.1	-4.9	-40.8%
Total	61.3	61.8	0.5	0.82%	65.5	4.2	6.9%

Table 10.2 – Floorspace Projections

Sector	Floorspace (Sq M)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	252,000	252,000	-	0.00%	259,000	7,000	2.8%
Office	548,400	606,000	57600	10.50%	656,400	108,000	19.7%
Industrial	432,000	277,200	-154800	-35.83%	255,600	- 176,400	-40.8%
Total	1,232,400	1,135,200	-97200	-7.89%	1,171,000	- 61,400	-5.0%

Table 10.3 – Employment Land Requirements

Sector	Land Change (Ha)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	60	60	0.0	0.00%	62	2	2.8%
Office	69	76	7.2	10.50%	82	14	19.7%
Industrial	103	66	-36.9	-35.83%	61	- 42	-40.8%
Total	231	202	-29.7	-12.82%	205	- 27	-11.6%

10.2.1. In summary, Tables 10.2 and 10.3 show that:

- The total office, industrial and warehousing floor space requirement in Newcastle is forecast to decrease by 61,400 sq. m (5%) between 2010 and 2038 in the Long Term Recovery scenario. This is entirely driven by a substantial reduction in Industrial floorspace. Taking into account the forecast decline in industrial floor space and plot ratio requirements, employment land requirements are estimated to decline by 27ha.
- Despite the overall net decline in land requirements, office floor space under the Long Term Recovery scenario is expected to rise substantially by 108,000 sq. m, which translates into 14ha in terms of land requirements. Warehousing floor space is expected to grow by 7,000 sq. m from 2010-2038, which equates to 2ha of new employment land.
- As industrial employment is expected to fall between 2010 and 2038, so too does the level of floor space required – with a decline of around 176,400 sq. m. This translates into a net decline in employment land of 42ha up to 2038.

10.3 St Chads Scenario

Table 10.4 – Employment Change

Sector	Job Change (1,000)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	4.1	4.1	0	0.00%	4.3	0.2	4.9%
Office	47.3	56.4	9.1	19.24%	61.7	14.4	30.4%
Industrial	10.3	9.5	-0.8	-7.77%	9.5	-0.8	-7.8%
Total	61.7	70	8.3	13.45%	75.5	13.8	22.4%

Table 10.5 – Floorspace Projections

Sector	Floorspace (Sq M)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	287,000	287,000	-	0.00%	301,000	14,000	4.9%
Office	567,600	676,800	109,200	19.24%	740,400	172,800	30.4%
Industrial	370,800	342,000	- 28,800	-7.77%	342,000	- 28,800	-7.8%
Total	1,225,400	1,305,800	80,400	6.56%	1,383,400	158,000	12.9%

Table 10.6 - Employment Land Requirements

Sector	Land Change (Ha)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	68	68	-	0.00%	72	3	4.9%
Office	71	85	14	19.24%	93	22	30.4%
Industrial	88	81	- 7	-7.77%	81	- 7	-7.8%
Total	228	234	7	2.98%	246	18	7.9%

10.3.1. In summary, Tables 10.5 and 10.6 show that:

- The total office, industrial and warehousing floor space requirement in Newcastle is forecast to increase by 158,000 sq. m (12.9%) between 2010 and 2038 in the St Chads scenario. While Industrial still shows a decline in terms of both floorspace and land requirements, the overall balance is an addition of 18ha by 2038.
- Office floor space under the St Chads scenario is expected to rise substantially by 172,800 sq. m, which translates into 22ha in terms of land requirements. Warehousing floor space is expected to grow by 14,000 sq. m from 2010-2038, which equates to 3ha of new employment land.
- As industrial employment is expected to fall between 2010 and 2038, so too does the level of floor space required – with a decline of around 28,800 sq. m. This translates into a net decline in employment land of 7ha up to 2038.

10.4 Cambridge Econometrics Scenario

Table 10.7 – Employment Change

Sector	Employment Change (1,000)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	4.1	4.1	0	0.00%	4.4	0.3	7.3%
Office	47.3	57.1	9.8	20.72%	62.7	15.4	32.6%
Industrial	10.3	9.5	-0.8	-7.77%	9.5	-0.8	-7.8%
Total	61.7	70.7	9	14.59%	76.6	14.9	24.1%

Table 10.8 – Floorspace Projections

Sector	Floorspace (Sq M)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	287,000	287,000	-	0.00%	308,000	21,000	7.3%
Office	567,600	685,200	117,600	20.72%	752,400	184,800	32.6%
Industrial	370,800	342,000	-28,800	-7.77%	342,000	- 28,800	-7.8%
Total	1,225,400	1,314,200	88,800	7.25%	1,402,400	177,000	14.4%

Table 10.9 – Employment Land Requirements

Sector	Land Change (Ha)		Change 2010 - 2030		Change 2010 - 2038		
	2010	2030	No	%	2038	No	%
Warehousing	68	68	0.0	0.00%	73	5	7.3%
Office	71	86	14.7	20.72%	94	23	32.6%
Industrial	88	81	-6.9	-7.77%	81	- 7	-7.8%
Total	228	235	7.8	3.45%	249	21	9.3%

10.4.1. In summary, Tables 10.8 and 10.9 show that:

- The total office, industrial and warehousing floor space requirement in Newcastle is forecast to increase by 177,000 sq. m (14.4%) between 2010 and 2038 in the Cambridge Econometrics scenario. While Industrial still shows a decline in terms of both floorspace and land requirements, the overall balance is an addition of 21ha by 2038.
- Office floor space under the Cambridge Econometrics scenario is expected to rise substantially by 184,800 sq. m, which translates into 23ha in terms of land requirements. Warehousing floor space is expected to grow by 21,000 sq. m from 2010-2038, which equates to 5ha of new employment land.
- As industrial employment is expected to fall between 2010 and 2038, so too does the level of floor space required – with a decline of around 28,800 sq. m. This translates into a net decline in employment land of 7ha up to 2038.

11 Summary and Policy Implications

11.1 Employment Forecasts and Labour Supply

11.1.1. The Labour supply forecasts within our three scenarios for Newcastle differ slightly, but all share the same core trends of a minimal increase in warehousing jobs, a substantial increase in office jobs and a decline in industrial jobs. These are shown in Table 11.1 below.

Table 11.1 – Forecast Employment Change 2010 - 2038

	Long Term Recovery	St Chads	Cambridge Econometrics
Warehousing	0.1	0.2	0.3
Office	9	14.4	15.4
Industrial	-4.9	-0.8	-0.8
Total Change (no)	4.2	13.8	14.9
Total Change (%)	-18.4%	27.6%	32.1%

11.2 Floor Space and Employment Land Requirements

11.2.1. In line with the employment forecasts, offices are expected to see increasing requirements for floor space and employment land in Newcastle between 2010 and 2038 (see Tables 11.2 and 11.3). For example, the St Chads and Cambridge Econometrics scenarios both forecast employment land requirements of over 20ha.

11.2.2. Industrial requirements are forecast to suffer a continuing fall and the Long Term Recovery forecasts that the decline in floor space could be as high as 176,400 sq. m (translating into a net decline in land of 42ha). Warehousing is relatively consistent across the three scenarios with only a difference of 200 jobs between the highest and lowest forecast.

11.2.3. Despite the expected fall in industrial employment, floor space and land, it is still important that a good supply of industrial space is provided in Newcastle. The industrial sector is a key generator of productivity in the wider economy due to its continual introduction of new products and processes. However, despite this challenges do remain. For Newcastle to retain its manufacturing sector and attract the higher value added businesses to replace those that do relocate, it needs to provide the appropriate conditions for companies within the sector.

Table 11.2 - Forecast Floorspace Change 2010 - 2038

	Long Term Recovery	St Chads	Cambridge Econometrics
Warehousing	7,000	14,000	21,000
Office	108,000	172,800	184,800
Industrial	- 176,400	- 28,800	- 28,800
Total Change (no) -	61,400	158,000	177,000
Total Change (%)	-18.4%	27.6%	32.1%

Table 11.3 – Forecast Employment Land Requirement 2010 - 2038

	Long Term Recovery	St Chads	Cambridge Econometrics
Warehousing	2	3	5
Office	14	22	23
Industrial	-42	-7	-7
Total Change (no)	-27	18	21
Total Change (%)	-18.4%	27.6%	32.1%

11.3 Summary and key implications for employment land planning

11.3.1. It must be noted that the above estimates of employment land are derived from net forecasts of employment change. That is to say, the quantities of floor space and land indicated are representative of the floor space and land required to accommodate the net change in employment allowing for losses as well as gains across key sectors.

11.3.2. In planning for the future needs of employment land in Newcastle, regard also needs to be given to:

- The need for additional supply to facilitate churn (i.e. where occupiers move premises for reasons other than growth or contraction of employment, e.g. lease events)
- The need for a range of sites to give occupiers and investors choice (sometimes referred to as „margin for choice’)
- The reality that often, particularly in locations such as Newcastle, disused employment land is not efficiently recycled as viability constraints can result in vacated industry sites and premises either remaining vacant or being promoted for a change of use (rather than coming forward for alternative B use class employment).

11.3.3. As a result of these factors, there is a need to plan for a larger supply than that which a net labour market employment forecasts would imply. It is useful to compare the above figures with the historic rates of employment land/floor space take up to demonstrate this point. As illustrated in Table 8.2 earlier in this report, the mid period take up level suggests a figure of 9 ha per annum of employment land take up, which multiplied by the same period as applied above (2010 to 2038 – 28 years), suggests a gross land requirement of 252 ha.

Land Change (Ha)	Total Completions				
	1994 - 1998	1999 - 2003	2004 - 2008	2009 - 2011	
Sector					
Warehousing	2	2	1	0	6
Office	1	5	7	6	19
Industrial	3	2	2	6	13
Total	7	9	10	12	37

11.3.4. We would advise that in planning for the future employment needs of the Newcastle area, that the projected take up level should be regarded as the upper limit of the amount of land required to 2038. We would advise that, at any time, there should also be five years’ supply of deliverable sites equating to 45ha in order to meet market requirements.

11.3.5. A further consideration is the quality of sites and premises. This report has dealt principally with the quantitative requirements of employment land. Ensuring that Newcastle has the right type of sites in the right location is equally important. We understand that officers are progressing the development of a new portfolio of sites as part of their review of employment land and we recommend the findings of this report be taken into account in this regard.

Appendix A – Sector Definitions and Full Employment Forecasts for Newcastle, 2010 – 2030 – 2038

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	Employment 2010	2030			2038		
		Cambridge Economics	St Chads	Long Term Recovery	Cambridge Economics	St Chads	Long Term Recovery
1 Agriculture etc	1.2	-0.4	-0.4	-0.4	-0.5	-0.5	-0.5
2 Coal	0	0	0	0	0	0	0
3 Oil & Gas etc	0	0	0	0	0	0	0
4 Other Mining	0	0	0	0	0	0	0
5 Food, Drink & Tob.	1.2	-0.5	-0.5	-0.5	-0.6	-0.6	-0.6
6 Text., Cloth. & Leath	0.3	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
7 Wood & Paper	0.4	-0.1	-0.1	-0.1	-0.2	-0.2	-0.2
8 Printing & Publishing	1.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
9 Manuf. Fuels	0	0	0	0	0	0	0
10 Pharmaceuticals	0.5	0	0	0	0	0	0
11 Chemicals nes	0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
12 Rubber & Plastics	0.5	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
13 Non-Met. Min. Prods.	0.2	0	0	0	0	0	0
14 Basic Metals	0	0	0	0	0	0	0
15 Metal Goods	1.2	0	0	0	0	0	0
16 Mech. Engineering	2.5	0.1	0.1	0.1	0	0	0
17 Electronics	0.3	0	0	0	0	0	0
18 Elec. Eng. & Instrum.	0.3	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
19 Motor Vehicles	0.6	0.2	0.2	0.2	0.3	0.3	0.3
20 Oth. Transp. Equip.	0.1	0	0	0	0	0	0
21 Manuf. nes	0.9	0.1	0.1	0.1	0.3	0.3	0.3
22 Electricity	0.7	-0.3	-0.3	-0.3	-0.4	-0.4	-0.4
23 Gas Supply	0	0	0	0	0	0	0
24 Water Supply	0	0	0	0	0	0	0
25 Construction	8.6	0.6	0.5	0.6	0.9	0.7	0.9
26 Distribution	4.1	0	0	0	0.3	0.2	0.3
27 Retailing	17.2	-1	-1.2	-1	-1.2	-1.5	-1.2
28 Hotels & Catering	9.3	1.9	1.8	1.9	3	2.8	3
29 Land Transport etc	4	0.4	0.3	0.4	0.3	0.2	0.3
30 Water Transport	0	0	0	0	0	0	0
31 Air Transport	1	0.6	0.6	0.6	1.1	1.1	1.1
32 Communications	1.8	0	0	0	0	0	0
33 Banking & Finance	7.5	2.2	2.1	2.2	2.8	2.6	2.8
34 Insurance	0.5	0.2	0.2	0.2	0.3	0.3	0.3
35 Computing Services	5.6	-0.4	-0.5	-0.4	-0.5	-0.6	-0.5
36 Prof. Services	19.1	7.5	7.2	7.5	12.1	11.6	12.1
37 Other Bus. Services	14.6	0.3	0.1	0.3	0.7	0.5	0.7
38 Public Admin. & Def.	22.3	-0.6	-0.8	-0.6	0.1	-0.3	0.1
39 Education	21.3	-0.6	-0.8	-0.6	0.4	0.1	0.4
40 Health & Social Work	32.2	1.7	1.3	1.7	4.4	3.8	4.4
41 Misc. Services	11.2	4.9	4.7	4.9	7	6.7	7
Total employment	192.4	16.3	13.9	16.3	29.9	26.3	29.9

Warehousing

Office

Industrial

**Appendix B - Employment Forecasts, Floor Space Estimates and Employment Land Requirements
for selected years between 2010 and 2038**

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Cambridge Econometrics Scenario

Employment (1,000s)							
Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	4.1	3.9	3.9	4	4.1	4.1	4.4
Office	47.3	58.2	50.6	53.3	57.1	60.4	62.7
Industrial	10.3	9.8	9.7	9.4	9.5	9.4	9.5
Total	61.7	71.9	64.2	66.7	70.7	73.9	76.6

Floorspace (Sq M)							
Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	287,000	273,000	273,000	280,000	287,000	287,000	308,000
Office	567,600	698,400	607,200	639,600	685,200	724,800	752,400
Industrial	370,800	352,800	349,200	338,400	342,000	338,400	342,000
Total	1,225,400	1,324,200	1,229,400	1,258,000	1,314,200	1,350,200	1,402,400

Land Change (Ha)							
Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	68	65	65	67	68	68	73
Office	71	87	76	80	86	91	94
Industrial	88	84	83	81	81	81	81
Total	228	236	224	227	235	240	249

St Chads Scenario

Employment (1,000s)							
Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	4.1	3.9	3.9	4	4.1	4	4.3
Office	47.3	48.1	50.3	52.9	56.4	59.6	61.7
Industrial	10.3	9.8	9.7	9.4	9.5	9.4	9.5
Total	61.7	61.8	63.9	66.3	70	73	75.5

Floorspace (Sq M)							
Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	287,000	273,000	273,000	280,000	287,000	280,000	301,000
Office	567,600	577,200	603,600	634,800	676,800	715,200	740,400
Industrial	370,800	352,800	349,200	338,400	342,000	338,400	342,000
Total	1,225,400	1,203,000	1,225,800	1,253,200	1,305,800	1,333,600	1,383,400

Land Change (Ha)							
Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	68	65	65	67	68	67	72
Office	71	72	75	79	85	89	93
Industrial	88	84	83	81	81	81	81
Total	228	221	224	227	234	237	246

Long Term Recovery Scenario

Employment (1,000s)

Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	3.6	3.6	3.6	3.6	3.6	3.7	3.7
Office	45.7	42.9	45.9	47.8	50.5	53.5	54.7
Industrial	12	9.8	8.7	8.25	7.7	7.3	7.1
Total	61.3	56.3	58.2	59.65	61.8	64.5	65.5

Floorspace (Sq M)

Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	252,000	252,000	252,000	252,000	252,000	259,000	259,000
Office	548,400	514,800	550,800	573,600	606,000	642,000	656,400
Industrial	432,000	352,800	313,200	297,000	277,200	262,800	255,600
Total	1,232,400	1,119,600	1,116,000	1,122,600	1,135,200	1,163,800	1,171,000

Land Change (Ha)

Sector	2010	2015	2020	2025	2030	2035	2038
Warehousing	60	60	60	60	60	62	62
Office	69	64	69	72	76	80	82
Industrial	103	84	75	71	66	63	61
Total	231	208	203	202	202	204	205

Appendix N - Copy of the Business Survey

Appendix N - Copy of the Business Survey



**Employment Land Review
Business Survey**

November 2009

Name:	
Company:	
Address:	
Telephone Number:	
Email Address:	

Newcastle-upon-Tyne Overview:

What business category does the company fall into? (Please tick the relevant sector)	Business Services	
	Advanced Engineering / Manufacturing	
	Creative Industries	
	Renewables & Offshore Industries	
	Tourism & Leisure	
	Medical & Health	
	Other, please state:	

Why did the business locate in Newcastle?	
Main positive factors of Newcastle as a location? (Focusing on infrastructure, availability of sites, transport, skills, business support etc)	
Main negative factors of Newcastle as a location? (Focusing on infrastructure, availability of sites, transport, skills, business)	
Are there other areas of Newcastle or Tyne & Wear that would be preferable or as good?	
Where and Why?	
Who are your main suppliers and where are they located?	
Who are your main customers and where are they located?	

Future growth prospects:

Turnover?	
Number of Employee's?	

Will the business be moving into new areas of	
What sectors do you see as being growth sectors?	
In your view what are the growth prospects for	

Premise Requirements:

What type of business space are you located in i.e offices?	
Are you looking to relocate? /If you were, where would you relocate to?	
What are / what would your space requirements be?	
What are / what would your land requirements be?	
Would you be able to satisfy your needs in Newcastle?	
If not, where would you look?	
Do you feel there is a general shortage of sites in terms of locations?	
Do you feel there is a general shortage of sites to meet the needs of specific sectors?	

Any other comments?	
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We will be holding an Employment Land Review Workshop w/c 30.12.09. Please indicate below if you be interested in attending:

	Please send us a formal invitation to the Employment Land Review Workshop
	Please do not send us any further information on the Employment Land Review Workshop

Completed forms should be returned, either via email or post to the following address:

Dianne Perry, Planning & Housing Strategy, Newcastle City Council, Civic Centre
 Newcastle upon Tyne, NE1 8PH, Tel: 0191 277 7187, Fax: 0191 261 9180
 Email: dianne.perry@newcastle.gov.uk

Appendix O - List of Workshop Attendees

Appendix O - List of Workshop Attendees

Facilitators:

Peter Cockbain (Senior Planning Policy Officer) Dianne Perry (Planning Policy Officer)

Attendees:

Grame Smith (One North East) Paul Taylor (Nexus)
Ben Stubbs (South Tyneside Council) Louise Oakley (BHP)
Stephanie Linnell (Northumberland County Council) Simon Haggie (Knight Frank)
Clive Coyne (Gateshead Council) Phil Jones (One North East)
Kevin Richardson (Economic Development: Newcastle City Council) Erin Robson (Newcastle International Airport)
Tom Collins (Signet Planning)

ELR PHASING AND VIABILITY

As at January 2014

As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
				TOTAL	101.15	21.69	44.50	34.96	721,193	77,717	309,645	333,832
				CITY CENTRE	12.54	1.88	3.97	6.69	371,062	71,217	104,814	195,032
				AIRPORT	50.40	0.00	22.98	27.43	232,100	0	97,050	135,050
				EAST	25.79	14.15	10.79	0.85	75,460	0	71,710	3,750
				WEST	7.33	2.00	5.33	0.00	39,910	6,500	33,410	0
				NORTH	51.52	0.00	24.10	27.43	2,661	0	2,661	0
Ref	Site name & address	CIL Zone	Viability	Conclusion	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
1313	East Pilgrim Street Masterplan Area	City Centre	Viability testing shows positive land value.	Retail-led regeneration scheme to include an element of B1 floorspace.	Medium to long term. (1.5ha/1.5ha)		1.50	1.50			37500	37500
1412	Main Former Brewery Site	City Centre	Viability testing shows positive land value.	This strategic site will come forward for mixed use with an element of employment use.	S/M/L (0.75ha/0.75ha/0.75ha)	0.75	0.75	0.75		27317	27317	27317
1331	St James Metro Station	City Centre	Viability testing shows positive land value.	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term.	Medium term.		0.45				13500	
4329 & 4330	NCC Coach Park & WH Smith Depot	City Centre	Viability testing shows positive land value.	The 4th Yard Study indicates that the wider area of Fourth Yard is capable of accommodating up to 186,000 sq.m (2,000,000 sq.ft) of office space to become the 'Spinningfield' for Newcastle. This site has the potential to come forward with an element of	Medium Term		0.39				5250	
1328	Strawberry Place	City Centre	Viability testing shows positive land value.	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term.	Medium to long term. (0.32ha / 0.32ha)		0.32	0.32			6615	6615
1076	Plot 12 Quayside	City Centre	Viability testing shows positive land value.	Anticipated that the site will be taken up when the market return, given its location in the urban core and the local success of similar schemes.	Medium term		0.29				8700	
3064	Mailing Street	City Centre	Viability testing shows positive land value.	2,032 sq.m of B1 floorspace proposed as part of Phase 1 of the 'Ouseburn and East Quayside Development Framework'	Medium term		0.15				2032	
3077	Heber Street and Brewery Offices	City Centre	Viability testing shows positive land value.	Site will benefit from the proximity to Science Central and may not come forward for employment.	S/M/L (0.13ha/0.13ha/0.13ha)	0.13	0.13	0.13		3900	3900	3900
1400	Stephenson Quarter	City Centre	Viability testing shows positive land value.	The site is part of the Accelerated Development Zone (ADZ) and will come forward with an element of Grade A office space.	Short term.	1.00				40000		
1398	South of Pottery Lane	City Centre Zone	Viability testing shows positive land value.	Could come forward for employment led, mixed use development in the longer term.	Long term			1.50				45000
1374	Forth Goods Yard	City Centre Zone	Viability testing shows positive land value.	The 4th Yard Study identifies the site as being capable of accommodating up to 186,000 sq.m (2,000,000 sq.ft) of office space to become the 'Spinningfield' for Newcastle. Despite this the delivery of the site for employment uses in long term and uncertain	Long term			1.38				41400

ELR PHASING AND VIABILITY

As at January 2014

As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
4709	Newcastle City Heliport	City Centre Zone	Viability testing shows positive land value.	Site is unsuitable for housing, and the likelihood of the site being developed for employment uses is limited by proximity to the gas holder.	Long term			0.77				23100
1384	Safestore (former Heron's Garage)	City Centre Zone	Viability testing shows positive land value.	Long term and uncertain site. May not come forward for employment uses. Constrained by viability and land assembly in the short term.	Long term			0.34				10200
5290	Lower Steenbergs Yard	City Centre	Viability testing shows modest positive land value	High demand anticipated as part of the wider regeneration of the Ouseburn.	Medium term.		0.31					
1713	Southside, Newcastle Airport	High Zone	Viability testing shows positive land value for general employment use.	The site is likely to come forward as part of the Airport's expansion plans (subject to market conditions improving) 32.0	Medium offices (5.55ha (22,000) and		13.78	18.23			59500	97500
5146	Airport Southside Expansion site	High Zone	Viability testing shows positive land value for general employment use, but negative land value for an office park. <u>Over the medium to long term</u>	The site is likely to come forward as part of the Airport's expansion plans and would be suitable for employment uses including a solus site	Medium to long term (7.20ha/7.20ha)		7.20	7.20			28800	28800
4359	South of Freight Village, Airport	High Zone	Viability testing shows positive land value for general employment use.	The site is likely to come forward as part of the Airport's expansion plans (subject to market conditions improving).	Medium to long term (2.0ha /2.0ha)		2.00	2.00			8750	8750
2703	Sandy Lane, Brunswick Industrial Estate	Medium Zone (No CIL chargeable)	Viability testing shows marginal negative land value.	The site performs well against market attractiveness indicators but poorly against sustainability indicators. This infill site is likely to come forward when market conditions improve.	Medium term		1.12				2661	
ED3.1 (32) 3052	Siemens, Shields Road South	Medium CIL Zone	Viability testing shows negative land value.	Suitable for employment use.	Medium term		6.41				27000	
5294	Walker Riverside North (Neptune Energy Park Phase 3)	Low Zone (No CIL chargeable)	Viability testing shows negative land value, but is anticipated to come forward as part of the NELEP Enterprise Zone.	Anticipate the site will come forward in the short term	Short term.	5.59					26544	
4576	C/A Parsons Works, Shields Road	Medium CIL Zone	Viability testing shows negative land value. However, the site should be viable without intervention when market improves.	Site is likely to come forward in the short term	Short term	2.05						
5253	Shepherds Offshore land on former Neptune Yard off Fisher Street	Low CIL Zone	Viability testing shows negative land value. However, the site is part of the NELEP Enterprise Zone.	Site is likely to come forward in the short term	Short term	1.67						
5234	Land at former Neptune Yard (Neptune Energy Park Phase 2ii)	Low CIL Zone	Viability testing shows negative land value. Anticipated to come forward as part of the NELEP Enterprise Zone.	Site is likely to come forward in the short term	Short term	2.10						
4721	Wellstream Naval Yard, Wincomblee Road	Low CIL Zone	Viability testing shows negative land value. Anticipated to come forward as part of the NELEP Enterprise Zone.	Site is likely to come forward in the short term	Short term	1.77						
4476	Land at junction of Abingdon Road and Fisher Street	Low CIL Zone	Viability testing shows negative land value. Anticipated to come forward as part of the NELEP Enterprise Zone.	Site is likely to come forward in the short term	Short term	0.97						
ED3.1 (32) 3210	Siemens, Shields Road North	Medium CIL Zone	Viability testing shows negative land value.	Suitable for employment use.	Medium term.		3.23				13566	
4250	Rhodes Street, Walker	Low CIL Zone	Viability testing shows negative land value.	Suitable for employment use.	Medium term		1.15				4600	

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As at January 2014

As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
4438	Dobson's Yard, Wincomblee Road	Low CIL Zone	Viability testing shows negative land value.	Needs significant ground works / investment. Unlikely to come forward until the Neptune Energy Park has been developed.	Long term			0.85				3750
3025	General Hospital Site	Medium Zone (No CIL chargeable)	Viability testing shows negative land value without intervention. It is intended that the adjacent supermarket development together with grant	Planning permission approved for the Centre for Ageing Campus (B1b)	Medium term		3.20				19549	
4219	Whitehouse Enterprise Centre	Low Zone (No CIL chargeable)	Viability testing shows negative land value without intervention.	Anticipate that the site will come forward in the short to medium term.	Short term (2 ha)	2.00				6500	6500	
2758	Cutty Coats, Throckley Industrial Estate	Medium Zone (No CIL chargeable)	Viability testing shows marginal negative land value.	Site is part of Throckley Industrial Estate which continues to trade well despite the down turn in market conditions.	Medium term.		1.12				4700	
2794	Shelley Road, Newburn Industrial Estate	Medium Zone (No CIL chargeable)	Viability testing shows marginal negative land value.	Developer interest in eastern section of site. Likely to come forward when market conditions improve.	Medium term.		1.01				2661	
5320	Goldcrest Way, Newburn Riverside	Medium Zone (No CIL chargeable)	Viability testing shows negative land value	Viability affected by the current market conditions	Short term	1.12						
5321	Kingfisher Boulevard North, Newburn Riverside	Medium Zone (No CIL chargeable)	Viability testing shows negative land value.	Viability affected by the current market conditions	Short term	2.54						
5322	Kingfisher Boulevard South, Newburn Riverside	Medium Zone (No CIL chargeable)	Viability testing shows negative land value.	Site owner has indicated preference for site to come forward for housing. However, the area to the north west of Cell A is not suitable for housing given noise constraints. Circa. 10ha is available for office use, this could take the form of a solus site.	Discount							
2644	Newcastle Great Park (NGP) Cell A	High	Office development not viable under current market conditions, without intervention. Unlikely to come forward until long / ultra-long term	Site owner has indicated preference for site to come forward for housing.	Discount							
1515	Loadman Street	Medium Zone (No CIL chargeable)	Viability testing shows negative land value without intervention.	Likely to come forward for housing - the site is identified in the SHLAA	Discount							
1077	Malmö Quay	City Centre	Viability testing shows positive land value.	Likely to come forward for housing - the site is identified in the SHLAA	Discount							
2802	Newburn Riverside	Medium Zone (No CIL chargeable)	Viability testing shows negative land value without intervention.	The site is likely to be released for housing.	Discount							
1038	Ouseburn Central	City Centre	Viability testing shows modest positive land value	The site is already developed with starter units. The remaining site is in multiple ownership and is not deliverable	Discount							
1035	Spillers Quay	City Centre	Viability testing shows positive land value.	The site is made land and is not suitable	Discount							
3068	Cement works and scrap yard, Pottery Lane East	City Centre Zone	Viability testing shows positive land value.	Likely to come forward for housing - the site is identified in the SHLAA	Discount							
4029	Condercum Road West	Medium CIL Zone	Viability testing shows marginally negative land value, which is anticipated will improve over medium to long term.	The site is not available and not deliverable	Discount							

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As at January 2014

As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
1407	Blandford Square	City Centre Zone	Viability testing shows positive land value.	Fragmented ownership. Questionable whether this site will come forward in the plan period	Discount							
4328	Former BP Petrol Filling Station, George Street	N/A	N/A	Vacant site identified as potential employment site, but which has subsequently been brought forward by the College and as such is discounted.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4757	Land adjacent to DSS offices, Benton Park Road	N/A	N/A	Although this site is suitable for office floorspace, it is out of centre and the likelihood is that the remainder of the site will be developed out a residential.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
1090	Heaton Terrace, Shields Road West	N/A	N/A	Discount - Shields Road West to be de-allocated from employment use.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
1022	Former IRDL, Fossway	N/A	N/A	Discount: Not a serious likelihood of industrial use. Unsuitable for offices. Site would be better suited to housing.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4677	Lemington Allotments	N/A	N/A	The site is located within the Green Belt and is therefore located on policy grounds.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4671	Newburn Grange Farm	N/A	N/A	The site is located within the Green Belt and is therefore located on policy grounds.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4813	Fell House Farm	N/A	N/A	The site is located within the Green Belt and is therefore located on policy grounds.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4668	Whorlton Farm			The site is located within the Green Belt and is therefore located on policy grounds.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4673	Walbottle Colliery Farm 2			The site is located within the Green Belt and is therefore located on policy grounds.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
1684	Norwich Union & Westgate House			Discount - Owner is pursuing hotel use. Site is to small for inclusion within ELR.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
3079	Pitt Street Site			Site is to come forward for student accommodation.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4332	Skinnerburn Road A			Discount: Fairly isolated and peripheral site though within city centre boundary. Site below threshold.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4331	Skinnerburn Road B			Discount: Fairly isolated and peripheral site though within city centre boundary. Site below threshold.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4547	Newcastle Arena			Previous proposals / aspirations include a regional casino bid and scope to upgrade to a 10,000 seater stadium. The site should be removed from the database as there is no likelihood of the site coming forward for employment uses.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
1062	7-17 Lime Street			Discount: The site is to small for inclusion within the ELR.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A

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As at January 2014

As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
1078	Former Ice Factory, Maling Street			Discount. It is anticipated that the site will come forward for residential and also 'live-work' units, as such the site is discounted for employment use.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
3066	Stephen Easter/Kelly Plant			Discount - site likely to come forward for housing and site too small for inclusion within Employment Land Review.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4285	Spillers Mill, Quayside			Discount: 1NG have indicated this site will come forward for community / leisure facilities.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4289	Quay Timber Site			Discount: 1NG have indicated this site will come forward for 'Live Work' units and as such is not available for employment use.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4542	Pigeon Crees, Lime Street			Discount - site too small for inclusion within Employment Land Review and is likely to come forward for housing.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4543	Winns Products, Shieldfield Industrial Estate			Discount - site to come forward for purpose built student accommodation.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
4760	Land at junction of Byker Bank and Ford Street			Discount: Small site constrained by bad neighbour uses and ground stability. Site below the minimum threshold for inclusion within the Employment Land Review.	Discount.	N/A	N/A	N/A		N/A	N/A	N/A
1110	Heaney's, Land west of Hume Street (also known as East Bank)			Discount: East Bank is one of three national public sector sites to be brought forward under the Public Sector Surplus Land initiative. The likelihood is that the site will not come forward for commercial use, and as such the site is discounted from the E	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3022	Percy Street West			Discount: Likelihood is that the site will come forward for retail at ground floor level with residential above.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
1502	Scotswood Bridge Head			The likelihood is that the site will not be redeveloped for employment uses.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
2646	Newcastle Great Park (NGP) Cell C			Discount: Site is allocated for employment use in UDP but the SHLAA demonstrates a lack of deliverable housing sites Site owner is not willing to make the site available for employment. Site will provide circa 300 dwellings	Discount	N/A	N/A	N/A		N/A	N/A	N/A
2804	Newburn Haugh Allotments			Discount: Not a serious likelihood of industrial use and the site is unsuitable for offices. Site may be better suited to housing but there are viability issues.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3360	Former Caravan Site			Low value for current use. Good location for B2 starter units but unlikely to come forward without land assembly with 3360 and 3359. Unlikely to be attractive to the market. Discount, not a serious likelihood of the site coming forward. Part of UDP ED3.1	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4669	Walbottle Colliery			The site is located within the Green Belt and is therefore discounted on policy grounds.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4674	Winning Farm, Newburn			The site is located within the Green Belt and is therefore discounted on policy grounds.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4672	Walbottle Colliery Farm			The site is located within the Green Belt and is therefore discounted on policy grounds.	Discount	N/A	N/A	N/A		N/A	N/A	N/A

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As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
1411	Former brewery bottling plant			This strategic site will come forward for mixed use, area previously assumed to be employment has been taken up by student accommodation.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4292	CWS Engineering Depot			Prime location at the entrance to the Discovery Quarter. Owner is pursuing student accommodation on the site.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
1490	Calder Industrial Materials			Development on site has commenced for residential development. No realistic prospect of office development on site due to edge of centre location.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
1056	Portland Road Phase 2			The likelihood of the site coming forward for employment uses is very limited.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4545	Portland Road Phases 1A and 1B			The likelihood of the site coming forward for employment uses is very limited.	Discount	N/A	N/A	N/A		N/A	N/A	N/A

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As at January 2014	Site name & address	CIL Zone	Viability	Area	Total land area (ha.)	Short-term (ha.)	Medium-term (ha.)	Long-term (ha.)	Total floorspace (sq.m)	Short-term (sq.m)	Medium-term (sq.m)	Long-term (sq.m)
1075	Land west of Free Trade PH			Discount - site too small for inclusion within the Employment Land Review.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
1161	Garage, Lime Street			Discount - Site is long term and uncertain and is too small for inclusion in Employment Land Review.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3042	47-49 Lime Street			Discount. The likelihood is that the site will be refurbished rather than redeveloped and the future use may not be employment. In addition the site is too small for inclusion in the Employment Land Review.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3067	Morley's, Albion Row			Discount - the likelihood is that the site will come forward for residential use.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3069	GD Metal Recycling, Quality Row			Discount - the likelihood is that the site will come forward for residential use.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4290	Ince Site			Discount: 1NG have indicated that the Ince building provides a longer term opportunity to develop a commercial or residential offer on the site. The site is too small to be included within the Employment Land Review.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
1116	Upper Steenberg - Lower Plateau			Discount: Small land locked site, difficult for redevelopment without land assembly.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4223	Former Tyne Tees Studios			Cleared site within established city centre boundary. Adjacent to established central-east quayside officer quarter. However, this site is to come forward for student accommodation.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4398	North Eastern Co-op, 117 Newgate Street			Discount: The likelihood is that the site will be reused rather than redeveloped in the future. No certainty as to whether employment uses will come forward on the site.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4762	Forth Yard East inc Kings House			Railway arches with substantial undercroft a vital link into 4th yard flowing from the proposed Stephenson Quarter redevelopment. The likelihood is that Kings House will be reused rather than redeveloped. There is no certainty as to whether this will inc	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4733	Charlton Bonds Building, Waterloo Street			Discount - the site is below the minimum threshold for inclusion within the Employment Land Review.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4546	St George's Car Park & TA Centre			Discount - the site will be redeveloped by Newcastle University.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
1323	Terrace Place Car Park			Discount - the likelihood is that the site will come forward for residential development rather than employment use.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3374	Collingwood Buildings			Discount - the site is to be re-used rather than redeveloped.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3391	2 - 4 Hanover Square			Discount: The site is too small for inclusion within the ELR.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3031	Hanover Buildings			Discount - the site is below the minimum threshold for inclusion within the Employment Land Review/	Discount	N/A	N/A	N/A		N/A	N/A	N/A

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1160	Former Dallas Carpets			Discount - the site is below the minimum threshold for inclusion within the Employment Land Review/	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3070	Violet Close and Buddle Road			The likelihood is that the site will come forward for housing.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4758	Phoenix Works, High Street, Newburn			Discount	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3359	Lemington Glassworks			Discount. The likelihood of the site coming forward for employment uses is very limited.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3103	Atkinson Road			Discount: The likelihood is that the site will come forward for housing.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
3123	Former Mary Trevelyan School			Discount: The likelihood is that the site will come forward for retail / car showroom uses.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4739	Former Jesmond Picture House			Discount: The likelihood of the site coming forward for employment uses is very limited, and the site is too small for inclusion within the Employment Land Review.	Discount	N/A	N/A	N/A		N/A	N/A	N/A
4211	NGP office block D, Cell C			Retain as employment site.	Discount	N/A	N/A	N/A		N/A	N/A	N/A

Development Management

Neptune Energy Park Local Development Order

June 2012



Newcastle
City Council 

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Neptune Energy Park Local Development Order

Executive summary

1. In August 2011, the Government announced the creation of a new Low Carbon Enterprise Zone (EZ) within the North Eastern Local Enterprise (LEP) area which will operate until 2020. A significant element of the Enterprise Zone consists of areas of the north bank of the River Tyne, including the former Neptune shipyard, renamed the Neptune Energy Park. Companies locating within the Neptune Energy Park area of the Enterprise Zone will benefit from enhanced capital allowances. The Zone is also the subject of a more simplified planning process. This is provided through the creation of a Local Development Order (LDO) which sets out an agreed basis for what sort of development will be permitted in the future.
2. The LDO provides certainty for businesses considering moving into the Enterprise Zone by allowing marine offshore related industries and renewable energy low carbon manufacturing industries uses on the site and a range of buildings, extensions to buildings and external plant and equipment including microgeneration equipment within the Enterprise Zone. New free standing buildings which are not within the curtilage of an existing building would still require planning permission. The Enterprise Zone extends over a number of sites and local authorities and there will be a series of LDOs produced as a suite of related but still locally relevant plans that set out individual parameters for different areas within the EZ. This document covers the parameters for the Neptune Energy Park.
3. Various size parameters and conditions are included within the LDO in order to protect adjacent residents from noise and disturbance from any developments and ensure the development is in character with the surrounding area. Car parking numbers will also be retained and, where required, extended on the site as part of any large development.
4. This document sets out the various considerations to be taken into account when designing development in the Neptune Energy Park areas of the Enterprise Zone, contact details and the Local Development Order itself.

1. Introduction

1.1 In August 2011 the Government announced the site locations of a designated Enterprise Zone within the North Eastern LEP area. The Government's approach to the 'new generation' of Enterprise Zones is based on:

- Maximising and generating a positive impact for the wider economic area.
- The long term economic success of both a Zone and the wider area going beyond the initial period of Government subsidy.
- Connection between the Zone and the strategic economic priorities of the wider area.
- Minimising displacement and avoiding localised competition.

1.2 The aim is to secure new investment and create value-added employment in the low carbon economy and supporting industries. Whilst the low carbon economy operates in a fiercely competitive global market place, the Low Carbon Enterprise Zone initiative offers a practical means of positioning the North Eastern LEP area ahead of other similar places.

1.3 The Low Carbon Enterprise Zone in the North Eastern LEP area is three main sites focussing on Low Carbon Economy sectors:

- Offshore Wind and Renewables (River Tyne North Bank).
- A19 Ultra Low Carbon Vehicles Corridor (Nissan Site)
- Blyth Estuary

1.4 The River Tyne North Bank sites comprise the Neptune Yard areas (18.4 ha), Swan Hunter (17.2 ha) and Royal Quays (38.8 ha). Companies locating at the Neptune Yard will be able to benefit from enhanced capital allowances for plant and machinery and they will also benefit from the added incentive of a simplified planning process. This is provided through a Local Development Order (LDO) which sets out an agreed basis for what sort of development will be permitted in the future and provides certainty for developers and enable quick access to sites.

2. Purpose of the Local Development Order

2.1 There is a thriving marine and offshore technology cluster of companies on the River Tyne employing thousands of people and with good prospects for growth. In addition, the Tyne is well placed to take advantage of significant inward investment opportunities around advanced engineering, manufacturing associated with the marine offshore related industries and renewable energy low carbon manufacturing industries. The Neptune Energy Park EZ areas have the potential to provide onshore infrastructure, manufacture and support services to the marine and renewable energy sector following the Crown Estates decision to identify Dogger Bank as a preferred zone for the development of one of the world's largest offshore wind farms.

2.2 The development of the Neptune Energy Park EZ areas supports the North Eastern LEP's Vision and Strategic Economic priorities as set out for the Government in December 2010:

"Through smart, enterprising leadership between the private, public and voluntary and community sectors we will rebalance the economy and create Europe's premier location for low carbon, sustainable, knowledge-based private sector-led growth and jobs"

"The low carbon economy ... presents significant growth and employment opportunities for the LEP area. There is genuine potential for the LEP economy to build on its existing strengths in manufacturing, engineering, energy and science to stimulate additional private sector growth and jobs in renewable energy and low carbon technology."

2.3 The offshore marine sector on the Tyne is recognised as one of the area's key economic assets and a key sector for the North Eastern LEP area in terms of both economic and job growth, and accelerating moves towards a low carbon economy. The offshore marine supply chain is currently in the process of diversifying into the offshore wind sector, providing the marine engineering skills and technical capabilities needed to support the growth of offshore wind. The LEP's strategy is to support the growth and diversification of existing companies, at the same time as attracting new manufacturing and servicing companies into the area, expanding and deepening the offshore marine supply chain and creating a critical mass capable of meeting the needs of customers across a global market. The development of the Neptune Energy Park, aided by the Local Development Order will support that strategy.

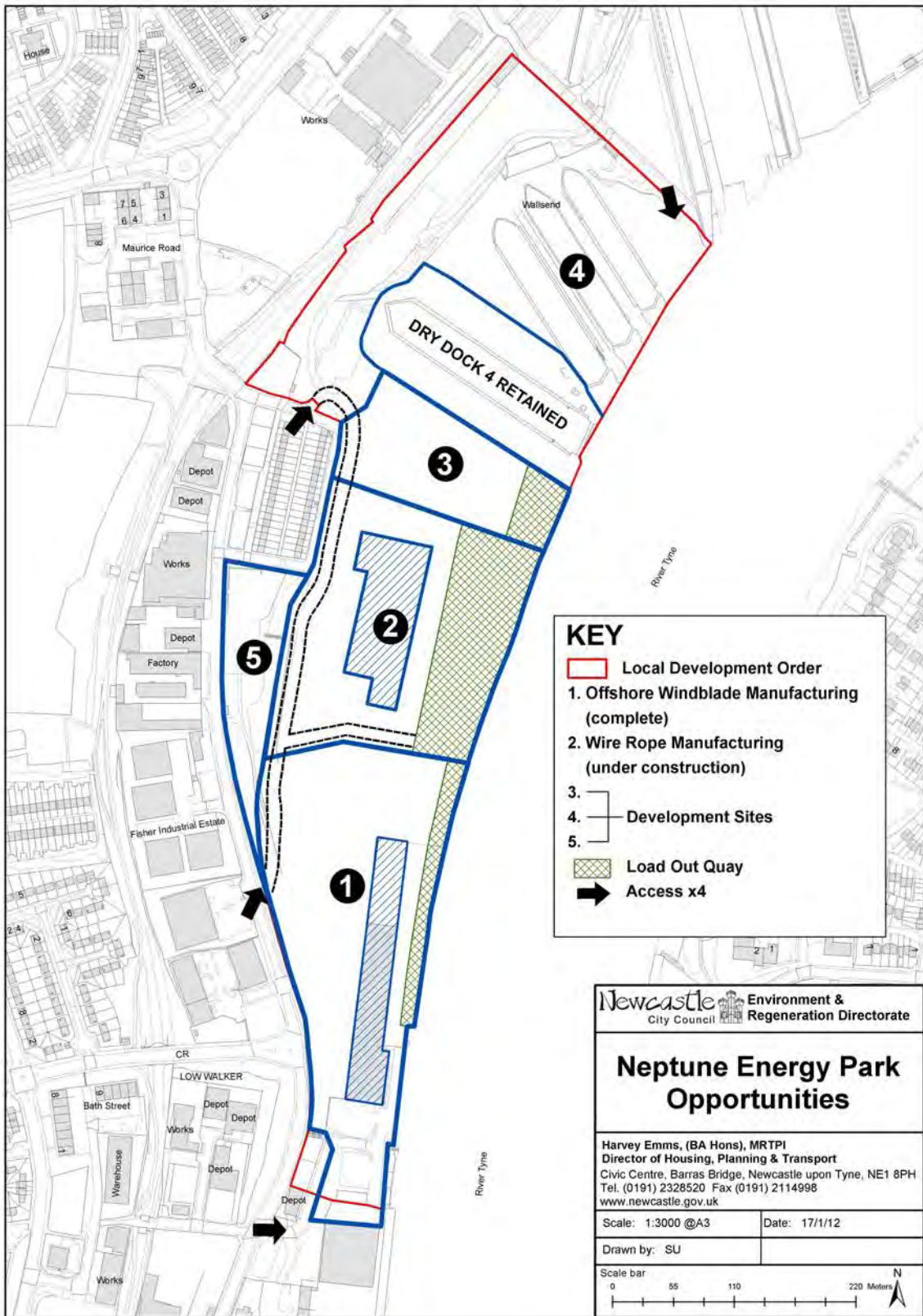
2.4 The City Council is committed to creating the conditions for economic growth and to the development of the Neptune Energy Park EZ areas, building on a commitment of over 25 years in which the Council has worked in partnership with the private sector to stimulate growth in the marine and offshore sector on the North Bank of the Tyne. The continued development of the Neptune Energy Park EZ areas will build on the area's existing strengths in marine offshore engineering and the site is ideally positioned to offer direct supply lines to offshore oil and gas fields and UK wind farms in the North Sea.

- 2.5 The development of Neptune Yard also supports national initiatives to maximise the opportunities in the National Renewable Energy Plan and to rebalance the economy by creating sustainable high value private sector manufacturing jobs in an area of high unemployment reliant on public sector employment. Tyneside has been designated as a Centre of Renewable Engineering (CORE) by the Government.

3. Planning Simplification

- 3.1 The expectation in Enterprise Zones is that a genuinely simplified approach to planning is put in place. LDO's are one way of achieving this.
- 3.2 LDO's were originally introduced as part of the Town and Country Planning Act (1990) although their roles and functions have been revised through subsequent legislation:
- Sections 61A-D and Schedule 4A to the Town and Country Planning Act 1990 as amended;
 - Planning and Compulsory Purchase Act 2004;
 - Section 188 of the Planning Act 2008; and the
 - Town and Country Planning (Development Management Procedure) (England) Order 2010.
- 3.3 This Local Development Order covers the area indicated on the attached Order Plan and cover that part of the North Banks of the Tyne Enterprise Zone which constitutes the former Neptune Shipyard, renamed the Neptune Energy Park. Under the Town and Country Planning (General Permitted Development) Order industrial buildings have limited "permitted development" rights, which enable certain forms of development to take place without the need for planning permission. The LDO in effect extends these rights in order to allow certain uses and much wider forms of development to take place without the need for planning permission, subject to certain conditions. This simplified planning regime provides a high level of certainty to developers and investors as well as reducing costs through the removal of planning fees and delays in securing planning permission.
- 3.4 The Local Development Order at the end of this document sets out the type of development that, in addition to the permitted development rights set out in Appendix 1, are no longer be the subject of a planning application. Developments within the LDO area that do not fall within the prescribed criteria of the Order may still be acceptable in planning terms, but would be subject to receiving planning permission. Section 5 of this document sets out a number of considerations to be taken into account when developing a scheme in Neptune Energy Park.
- 3.5 The making of a LDO does not obviate the need to obtain other statutory consents such as building regulation approval and consents under the Highways Act.
- 3.6 Development requiring Environmental Impact Assessment as defined in Schedules 1 and 2 of the Town and Country Planning (Environmental Impact Assessment) Regulations 2011 cannot be permitted via a Local Development Order. Any development on a site of over 0.5 hectares must be subject to an EIA screening from the City Council. You should contact the Council's Development Management Division to discuss this matter (see contact list).

4. Site Description



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4.1 The site of the North Banks of the Tyne Enterprise Zone includes both the former Swann Hunter ship yard and the former Neptune Shipyard. Newcastle City Council is the local planning authority for that part of the Enterprise Zone which comprises Neptune Energy Park and has drawn up the Local Development Order to cover an area of approximately 18 hectares. The LDO area is bounded by the River Tyne to the east, Benton Way to the north, Fisher Street and Woodside Avenue to the west and Staithes Street to the south.

4.2 The site has already seen a substantial amount of redevelopment in recent years:

Plot 1 – The southern portion of the zone is accessed from Staithes Street and is occupied by a 4000 square metre factory unit with the ability to provide off shore wind turbine blade manufacturing with associated car park and external storage area at a riverside load out location with space for a second phase of this development alongside the unit. This element was completed in 2010.

Plot 2– This phase has involved the remediation of the central portion of the zone, the construction of a new quay wall, construction of a new load out quay and a new internal access road leading down to the quayside area. A manufacturing unit for a wire rope facility is located on the central part of the site along with a heavy load out quay facility along the banks of the River Tyne.

Plot 4 – Three dry docks on the northern portion of the zone have been in-filled in preparation for future development. A fourth larger dry dock has also been refurbished and is still in operation.

4.3 Plots 3, 4 and 5 are vacant sites capable of development for the uses identified in the LDO. These sites will require remediation prior to development taking place, as well as flood risk assessment being undertaken and archaeological investigation in the western parts of plot 4. Plot 5 is situated in close proximity to housing on Woodside Avenue which will constrain the scale and form of development on this site.

4.4 The area benefits from the existence of a recently improved quayside wall area where the transfer of the completed large engineering machinery could be offloaded to shipping. The zone is also situated alongside Walker Riverside Offshore Technology Park which has two large loadout cranes.

5. Development Considerations

- 5.1 This section sets out the current planning context of Neptune Energy Park and issues that have been considered when the LDO was drafted. These issues will be of importance to developers considering additional development on the site, outside of the scope of the LDO. Over time these considerations may change and early consultation with the Local Planning Authority is always recommended.

Development Plan Policy

- 5.2 The development plan which covers the Neptune Energy Park is the Newcastle Unitary Development Plan, approved in 1998. The LDO area is allocated for Class B1, B2 and B8 (offices, light industry, general industry and warehousing) uses. The City Council is currently drawing up its Local Development Framework. The draft One Core Strategy was published in October 2011. A revised draft and a draft Development Management Development Plan Document will be published in 2012. Approval of these documents is anticipated in 2013. Developments which require planning permission will be assessed against the policies set out in these documents.

Residential Amenity

- 5.3 Woodside Avenue is located approximately 5 to 8 metres above the level of the main part of the Energy Park. The two areas are separated by a 9 metre high retaining wall, topped with a timber boundary fence. Future development will need to ensure development would not harm the amenity of these residents. This could impact upon the scale of development close to the houses and noise emitted from the site, both during construction and once developments are complete, as well as traffic generation and vehicle parking.

Transport Infrastructure

- 5.4 Under the provisions of the LDO, any new development can not reduce the level of car parking, cycle parking or loading areas. Extensions over 1,500 square metres in floor area will be required to provide additional on site parking provision (car and cycle) commensurate to the scale of the development and a Transport Statement or Transport Assessment. Developments shall consider the Council's guidance on Transport Assessments, Travel Plans and Parking (April 2010). This is available at: <http://www.newcastle.gov.uk/planning-and-buildings/planning/transportation-developments>
- 5.5 Major developments will need to be accompanied by a Transport Assessment identifying the impact of the development on the highway network.

Design

- 5.6 Although the site is a heavily industrialised landscape, visual amenity, design and the aspirations of Secured by Design are still important considerations,

especially when considering large buildings. For this reason the appearance of buildings and extensions must be in keeping with the established character of the area and developers will be encouraged to seek advice on designing out crime measures. Development allowed under the LDO will be required to submit details of external materials used for approval.

Noise

- 5.7 The impact of noise has been considered as part of the LDO process, principally the impact of noise on nearby residential properties. Conditions which set out appropriate noise level when measured at the site boundary form part of the LDO. Developments that are not permitted under the LDO will need to carry out appropriate noise survey in accordance with BS4142 to identify acceptable noise levels at site boundaries.

Flood Risk

- 5.8 The Energy Park's riverside location requires that flood risk matters are addressed in building design. The majority of the area fall within tidal flood zones 2 and 3. The Environment Agency consider the proposed uses within the EZ to be suitable for the flood risk at the site, providing flood resistance measures can be secured and safe access/egress is available during a flood event. For this reason finished floor levels must be placed above a 1 in 200 flood risk level including an allowance for climate change in accordance with Annex B of PPS25, plus 600mm freeboard. This level of 4.55 metres above ordnance datum is a condition of any development allowed under the Order.
- 5.9 The Environment Agency also strongly recommend that other flood resistant construction measures, such as a barrier on ground floor doors, windows and access points and bringing in electrical wires into the building at a high level are included within any development. Additional guidance can be found in the Environment Agency Flood line publication "Damage Limitation". A free copy is available at www.environment-agency.gov.uk.
- 5.10 Surface Water run off will not be increased as a result of LDO development as any development permitted by the order will be restricted to the curtilage of existing buildings which are already hard surfaced. It is not anticipated that there will be any increase in run off as a result of the development permitted by the Order.
- 5.11 Developments not covered by the LDO and permitted development rights will be required to submit a flood risk assessment to identify and assess risks of all forms of flooding to and from the development and to demonstrate how these risks will be managed, taking climate change into account. Early consultation with the Environment Agency is advised on this matter.
- 5.12 Any works that require a deposit or removal of a substance or object below mean high water spring mark or in any tidal river to the extent of the tidal influence would need consultation with the Marine Management Organisation prior to any works being undertaken as a marine license would be required.

Contamination

- 5.13 The site has a varied and long established history of industrial and marine related development, resulting in potential land contamination. Large parts of the LDO site have already been decontaminated as part of planning approvals for the development of existing buildings and their surroundings on the site. The LDO will not allow wholly new buildings to be constructed on land which has not been decontaminated. Any such proposal would be the subject of a planning application at which point this issue would be considered through the submission of appropriate survey work. The LDO allows extensions to existing buildings onto areas which have already been the subject of remediation.

Ecology

- 5.14 The River Tyne is identified as a wildlife corridor site. Hadrian's Way, a long distance cycle and footpath which runs close to the western boundary of the site is also identified as a wildlife corridor. The Order does not permit development which directly and physically affects these existing natural habitats. Development not covered by the LDO that could impact upon these areas will need to submit an appropriate habitat survey and any mitigation measured considered necessary.

Archaeology

- 5.15 The most important archaeological constraint on this site is the vicus (civilian settlement) which surrounds Segedunum Roman Fort. The exact extent of the vicus is unknown. The vicus forms part of the Frontiers of the Roman Empire World Heritage Site. The site includes many important 19th century industrial archaeological sites. The construction of docks for the shipyards is likely to have truncated earlier remains. A considerable amount of archaeological work has already been undertaken within the site in response to previous planning applications.
- 5.16 The part of the site with the greatest archaeological potential is likely to be the northern end closest to the Roman Fort. Roman remains could survive outside the footprint of the docks. For this reason further archaeological investigation would be required for any development not covered by the LDO within this area of the Energy Park.

6. Contacts

Organisation	Contact Details
Newcastle City Council- Enterprise Zone advice	Phil Payne, Economic Development Unit, Newcastle City Council phil.payne@newcastle.gov.uk 0191 2115803
Newcastle City Council- Planning and development advice	Jon Rippon, Walker Riverside area Development Management Team Manager jon.rippon@newcastle.gov.uk 0191 2115639
Environment Agency	Skinnerburn Road, Newcastle upon Tyne, NE4 7AR. 0191 2034203
Northumbrian Water	Abbey Road, Pity Me, Durham, DH1 5FJ. 0845 6047468
Natural England	Newburn Riverside, Newcastle upon Tyne, NE15 8NZ. 0300 0600827
Port of Tyne	Maritime House, Tyne Dock, South Shields, Tyne and Wear, NE34 9PT.
Northumbria Police (Secured by Design)	Allan Brown Crime Prevention Design Adviser, Newcastle Area Command, Northumbria Police, Clifford Street, Byker, Newcastle, NE6 1EA.
Marine Management Organisation	David Cowell, Lancaster House, Hampshire Court, Newcastle Business Park, Newcastle, NE4 7YH.

7. Statement of Reasons

7.1 The following paragraphs outline the rationale behind creating the LDO.

Description of the development permitted by the LDO

7.2 The LDO allows certain uses within the Neptune Energy Park Enterprise Zone area, as shown on Plan 1 and in relation to the following business sectors: Advanced engineering and manufacturing associated with the marine offshore related industries and renewable energy low carbon manufacturing industries.

The uses which are permitted by the Order are as follows

- (B1) Offices, research and development of products and processes, light industry;
- (B2) General Industry; and
- (B8) Storage and Distribution

7.3 The LDO also allows the following forms of development within the Neptune energy Park Enterprise Zone:

- The erection, extension or alteration of an industrial building or a warehouse within the curtilage of an existing building.
- Development carried out on industrial land for the purposes of an industrial process consisting of the installation of additional or replacement plant and machinery.
- Development consisting of the installation of solar PV or solar thermal equipment micro generation equipment.

Providing that:

- The Development Requirements identified in Table 1 are satisfied;
- The Conditions in Table 2 are satisfied; and
- The development shall commence prior to 1 April 2020.

7.4 The LDO does not permit the construction of new buildings that do not fall within the curtilage of an existing building on the site.

Justification for Creating the LDO

7.5 One of the key aspects of the new generation of Enterprise Zones is the establishment of a simplified planning regime that works in support of the delivery of the vision and economic strategy of the Local Enterprise Partnerships. The vision for the North Eastern LEP is to create Europe's premier location for low carbon, sustainable, knowledge-based private sector-led growth and jobs.

- 7.6 The Local Development Order is designed to assist the Neptune Energy Park to become a major hub for the development of the marine and offshore wind industries, building on the area's significant existing marine engineering capacity and the commitment shown to date within the North East to the promotion of the wider low carbon economy.
- 7.7 The LDO allows for significant buildings, extension to buildings, external plant and equipment and micro renewable technology to be constructed within the Energy Park without the need for planning permission to be obtained, provided they comply with a number size constraints and conditions. This will allow businesses to save time and cost in obtaining planning permission and provide certainty on the form of development allowed on their sites.

Statement of Polices that the LDO will implement

- 7.8 The LDO supports the implementation of existing strategies, plans and policies at a national, regional and local level. The relevant polices are listed below:

National Planning Polices

The National Planning Policy Framework (NPPF) introduces a presumption in favour of sustainable development which is defined in three dimensions:

- An economic role – contributing to a strong, responsive and competitive economy by ensuring sufficient land of the right type is available in the right places at the right time.
- A social role – supporting strong, vibrant and healthy communities.
- An environmental role – contributing to protecting our natural, built and historic environment, adapting to climate change including moving to a low carbon economy.

The LDO acts to support sustainable economic growth by not over-burdening business with planning requirements.

Regional Spatial Strategy for the North East 2008

RSS Policy 12	Sustainable Economic Development
RSS Policy 18	Employment Land portfolio
RSS Policy 38	Sustainable Construction

Newcastle Unitary Development Plan 1998

ED3 and ED3.1	Retention and regeneration of industry and business areas
ED4	Regeneration of older industrial areas
H2	Protecting residential amenity
SD1 and SD1.1	Sustainable Development

EN1.1	Design
NC1.1	Nature Conservation- protection of recognised sites
NC1.5	Protection of wildlife corridors
C4	Protection of archaeological interests
POL6	Remediation of contaminated land
POL7	Noise and Vibration
T4.5	Transport - Control over development
T7.1	Transport Infrastructure- Control over development

Life of the LDO

- 7.9 The LDO will be in place for 8 years ending on 1 April 2020. Once the LDO expires the City Council will consider the need to either return to the established planning system, extend the life of the LDO or review and modify the LDO. Any development which has commenced under the provision of the LDO will be allowed to be completed within a reasonable time period, in accordance with the terms and conditions of the LDO.

Monitoring of the LDO

- 7.10 The LDO will be subject to continuous monitoring to assess its effectiveness in achieving economic growth and ensuring that development is appropriate. A monitoring framework will be established to assess its impact over the LDO period.

Development requirements

- 7.11 The site is located adjacent to residential properties, alongside a number of sites of nature conservation importance and close to areas of archaeological interest. As a result there is a need to ensure that developments allowed by the LDO are appropriate within this area. The conditions and limitation placed on developments in the LDO area are set to secure:
- the scale and mass of development would not harm visual or residential amenity;
 - the appearance of buildings would reflect those elsewhere on the site;
 - car and cycling parking and service routes would be protected and extended where necessary;
 - energy efficiency measures would be incorporated into office developments;
 - noise and disturbance levels are controlled; and
 - ensure development is not subject to flood risk.

Other Statutory Requirements

- 7.12 The making of a LDO does not obviate the need to obtain other statutory consents such as Building Regulations Approval, consents under Highways legislation or the responsibility to notify statutory undertakers of works

proposed to be carried out on land they have a statutory interest. In advance of any development on site, developers should consider if the development would require an environmental impact assessment (EIA) with reference to the provisions of The Town and Country Planning (Environmental Impact Assessment) Regulations 2011 ('The EIA Regulations'). Developers can obtain a view from the City Council on the need for EIA by requesting a Screening Opinion under Regulation 5 of the EIA Regulations.

7.13 Although not an exhaustive list, particular attention is drawn to the following relevant legislation:

European

- Directive 92/43/EEC (The Habitats Directive)
- Directive 85/337/EEC (amended by Directive 97/11/EC) Environmental Impacts assessment

National

- Wildlife and Countryside Act 1981
- The conservation (Natural Habitats and etc) Regulations 1994
- The Environmental Permitting (England and Wales) Regulations 2010
- The Building Act 1984 and the Building (Amendment) Regulations 2012
- The Town and Country Planning Act 2007 (Control of Adverts) (England) Regulations 2007
- The Planning (Hazardous Substances) Act 1990
- The Planning (Hazardous Substances) Regulations 1992
- The Highways Act 1980
- UK Marine Policy Statement and Marine and Coastal Access Act 2009

7.14 The failure to comply with the relevant statutory requirements could result in any development being unlawful and any result in appropriate enforcement action being taken by the City council and /or other agencies. It is the responsibility of the developer for development to be in accordance with all relevant legislation.

The Neptune Energy Park Local Development Order

Part 1

Within the Neptune Energy Park Enterprise Zone area identified on Plan 1 of this Order, and in relation to the business sectors of advanced engineering and manufacturing associated with the marine offshore related industries and renewable energy low carbon manufacturing industries:

Planning permission is hereby granted by this Local Development Order for the following land uses as referred to in Schedule 1 of the Town and Country Planning (Use Classes) Order 1987 (or any re-enacting or revoking order with or without modification):

- (B1) Offices, research and development of products and processes, light industry;
- (B2) General Industry;
- (B8) Storage and Distribution.

Part 2

Within the Neptune Energy Park Enterprise Zone area identified on Plan 1 of this Order, the following forms of development are permitted by this Local Development Order for those uses identified in Part 1 of the Order:

Class A

The erection, extension or alteration of an industrial building or a warehouse, and offices.

Class B

Development carried out on industrial land for the purposes of an industrial process consisting of the installation of additional or replacement plant and machinery.

Class C

Development consisting of the installation of solar PV or solar thermal equipment micro generation equipment.

Provided that:

- The Development Requirements identified in Table 1 are satisfied;
- The Conditions in Table 2 are satisfied; and
- The development shall commence prior to 1 April 2020.

Table 1 – Development Requirements

Development within Part 2, Classes A, B or C is not permitted if:

(1a) the height of any part of the new building erected would exceed:

- (i) if within ten metres of the boundary of the curtilage of the premises, five metres;
- (ii) in all other cases, the height of the highest building within the curtilage of the premises or 15 metres whichever is the lower;

(1b) the height of any part of the building as extended or altered would exceed:

- (i) if within ten metres of the boundary of the curtilage of the premises, five metres;
- (ii) in all other cases, the height of the building being extended or altered;

(1c) any part of the development would be within five metres of the boundary of any boundary of the curtilage of the premises;

(1d) the gross floor space of any new building erected would exceed 500 square metres;

(1e) if in the case of extensions, the gross floor space of the original building would be exceeded by more than 50 per cent or by 3000 square metres, whichever is the lesser;

(1f) the height of any plant, machinery or micro-generation equipment would exceed 15 metres above ground level or more than 4 metre above the highest point of the building to which it would be attached, whichever is the lesser;

(1g) the development would require an Environmental Impact Assessment as development defined in Schedule 1 and 2 of the Town and Country Planning (Environmental Impact Assessment) Regulations 2011.

Table 2 – Planning Conditions

- 2(a) The development must be within the curtilage of an existing industrial building or warehouse;
- 2(b) Any works to erect, extend or alter an industrial building, warehouse or office pursuant to this Order shall only be carried out in materials chosen to match the host building or original building occupying that same curtilage unless otherwise agreed in writing with the Local Planning Authority;
- 2(c) All development with a gross floor area of greater than 1000 square metres shall not commence until a scheme to secure a minimum of 10% of their predicted requirement from a decentralised and renewable or low carbon source has been submitted to and approved in writing by the local planning authority unless otherwise agreed in writing by the Local Planning Authority. The approved scheme, shall be implemented before the development is brought into use and shall remain operational thereafter;
- 2(d) The finished floor level of the ground floor of any building shall be no lower than 4.55 metres above Ordinance Datum;
- 2(e) Buildings and extensions to buildings with a gross floor area of greater than 500 square metres shall not commence until a Construction Method Statement has been submitted to and approved in writing by the Local Planning Authority. The approved Construction Method Statement shall be adhered to throughout the construction period. The Construction Method Statement shall, where applicable, provide for:
- i. details of temporary traffic management measures, temporary access, routes and vehicles;
 - ii. wheel washing facilities;
 - iii. the parking of vehicles of site operatives and visitors;
 - iv. the loading and unloading of plant and materials;
 - v. storage of plant and materials used in constructing the development;
 - vi. measures to control vibration;
 - vii. measures to control the emission of dust and dirt;
 - viii. a scheme for the recycling and disposing of waste as a result of construction works;
 - ix. hours of operation;
 - x. the erection and maintenance of security hoardings, including decorative displays and facilities for public viewing; and
 - xi. a communication plan for liaising with the public.

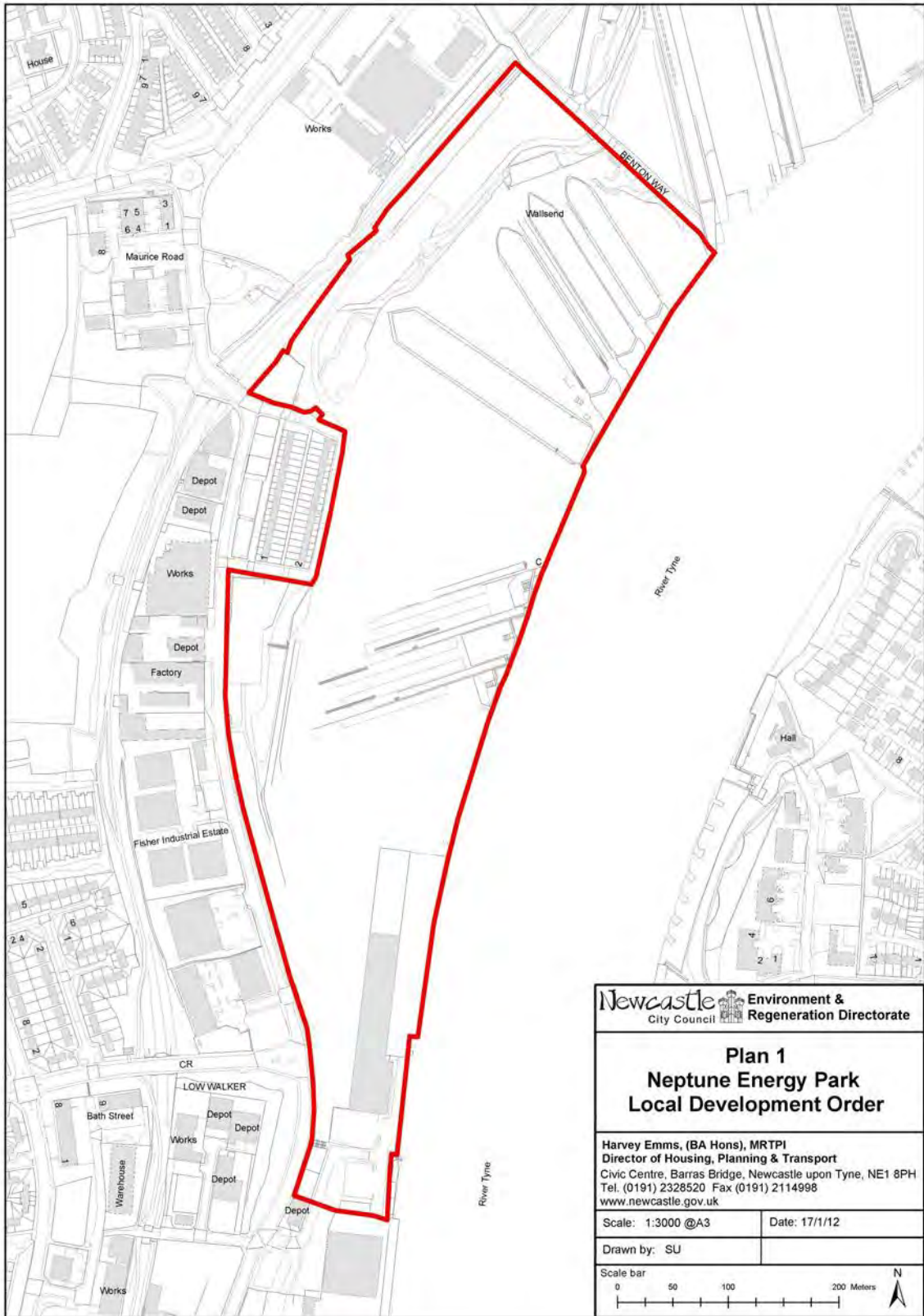
- 2(f) The level of noise generated from any development permitted by this Order shall not exceed a noise rating level, as defined by BS4142 of L eq, 1 hour of 50 dB(A) between 07:00 and 23:00 Monday to Friday and 48 (A)dB at any other time, as measured at the boundary of the nearest noise sensitive premises ;
- 2(g) Buildings and extension to buildings with a gross floor area of greater than 1500 square metres shall not commence until details of car parking and cycle parking provision to serve the building has been submitted to and approved in writing by the local authority. The approved scheme for car parking and cycle parking shall be implemented prior to the occupation of the development and shall thereafter be retained for car and cycle parking only at all times whilst the development is in use;
- 2(h) Any development pursuant to this order that would lead to an alteration in the number of useable car parking spaces available for the parking or turning of vehicles, or access arrangements to the car parking spaces, shall not be carried out until a scaled plan showing the proposed changes to the car parking arrangements have been submitted to and approved in writing by the Local Planning Authority;

Interpretation of LDO

For the purposes of the Local Development Order:-

“original building” does not include any building erected at any time under the Local Development Order or under Schedule 2 , Part 8 Class C of the Town and Country Planning (General permitted Development) (Amendment) (England) Order 2010 or extensions to a building granted planning permission after 1 June 2012.

Plan 1



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**Appendix 1 – Extract from the Town and Country Planning
(General Permitted Development) Order 1995 as
amended, Schedule 2, Part 8, setting out existing
permitted development rights for industrial and
warehouse developments**

Part 8 Industrial and Warehouse Development

Class A

Permitted development

A. The extension or alteration of an industrial building or a warehouse.

Development not permitted

A.1 Development is not permitted by Class A if:-

- (a) the building as extended or altered is to be used for purposes other than those of the undertaking concerned;
- (b) the building is to be used for a purpose other than:-
 - (i) in the case of an industrial building, the carrying out of an industrial process or the provision of employee facilities;
 - (ii) in the case of a warehouse, storage or distribution or the provision of employee facilities;
- (c) the height of the building as extended or altered would exceed the height of the original building;
- (d) the cubic content of the original building would be exceeded by more than:-
 - (i) 10%, in respect of development on any article 1(5) land, or
 - (ii) 25%, in any other case;
- (e) the floor space of the original building would be exceeded by more than:-
 - (i) 500 square metres in respect of development on any article 1(5) land, or
 - (ii) 1,000 square metres in any other case;
- (f) the external appearance of the premises of the undertaking concerned would be materially affected;
- (g) any part of the development would be carried out within 5 metres of any boundary of the curtilage of the premises; or
- (h) the development would lead to a reduction in the space available for the parking or turning of vehicles.

Conditions

A.2 Development is permitted by Class A subject to the conditions that any building extended or altered:-

- (a) shall only be used:-
 - (i) in the case of an industrial building, for the carrying out of an industrial process for the purposes of the undertaking or the provision of employee facilities;
 - (ii) in the case of a warehouse, for storage or distribution for the purposes of the undertaking or the provision of employee facilities;
- (b) shall not be used to provide employee facilities between 7.00 pm and 6.30 am for employees other than those present at the premises of the undertaking for the purpose of their employment;
- (c) shall not be used to provide employee facilities if a notifiable quantity of a hazardous substance is present at the premises of the undertaking.

Interpretation of Class A

A.3 For the purposes of Class A:-

- (a) the erection of any additional building within the curtilage of another building (whether by virtue of Class A or otherwise) and used in connection with it is to be treated as the extension of that building, and the additional building is not to be treated as an original building;
- (b) where two or more original buildings are within the same curtilage and are used for the same undertaking, they are to be treated as a single original building in making any measurement;
- (c) “employee facilities” means social, care or recreational facilities provided for employees of the undertaking, including creche facilities provided for the children of such employees.

Class B

Permitted development

B. Development carried out on industrial land for the purposes of an industrial process consisting of:-

- (a) the installation of additional or replacement plant or machinery,
- (b) the provision, rearrangement or replacement of a sewer, main, pipe, cable or other apparatus, or

- (c) the provision, rearrangement or replacement of a private way, private railway, siding or conveyor.

Development not permitted

B.1 Development described in Class B(a) is not permitted if:-

- (a) it would materially affect the external appearance of the premises of the undertaking concerned, or
- (b) any plant or machinery would exceed a height of 15 metres above ground level or the height of anything replaced, whichever is the greater.

Interpretation of Class B

B.2 In Class B, "industrial land" means land used for the carrying out of an industrial process, including land used for the purposes of an industrial undertaking as a dock, harbour or quay, but does not include land in or adjacent to and occupied together with a mine.

Class C

Permitted development

C. The provision of a hard surface within the curtilage of an industrial building or warehouse to be used for the purpose of the undertaking concerned.

Class D

Permitted development

D. The deposit of waste material resulting from an industrial process on any land comprised in a site which was used for that purpose on 1st July 1948 whether or not the superficial area or the height of the deposit is extended as a result.

Development not permitted

D.1 Development is not permitted by Class D if:-

- (a) the waste material is or includes material resulting from the winning and working of minerals, or
- (b) the use on 1 July 1948 was for the deposit of material resulting from the winning and working of minerals.

Interpretation of Part 8

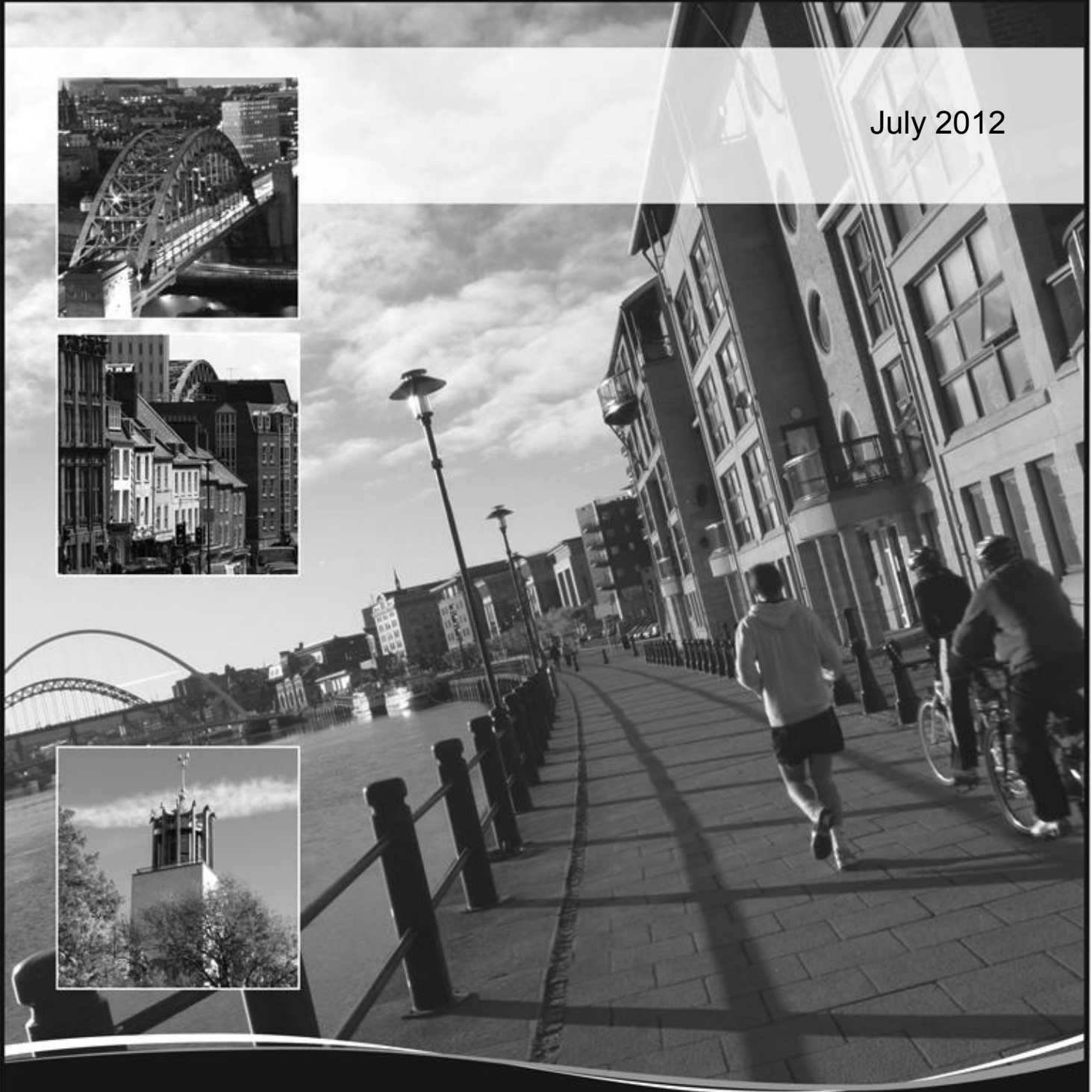
E. For the purposes of Part 8, in Classes A and C:-

“industrial building” means a building used for the carrying out of an industrial process and includes a building used for the carrying out of such a process on land used as a dock, harbour or quay for the purposes of an industrial undertaking but does not include a building on land in or adjacent to and occupied together with a mine; and

“warehouse” means a building used for any purpose within Class B8 (storage or distribution) of the Schedule to the Use Classes Order but does not include a building on land in or adjacent to and occupied together with a mine.

Newcastle City Deal

July 2012



Foreword

At a time when the UK and international economy faces low growth, and uncertain prospects for the future, England's cities will play a crucial role in re-igniting investment and job creation. This deal sets out the steps that we have agreed to unlock growth in Newcastle and help kick-start the economy across the North East.

The cornerstone of this deal is a commitment by government to ring-fence business rate income in four growth sites in Newcastle and Gateshead, and to retain them locally. This unique arrangement will allow both Councils the financial freedom to deliver ambitious plans for private sector-led growth, initiating a £90 million infrastructure programme, and over the next 25 years to secure £1 billion of investment and create around 13,000 additional jobs. We also announce a major step forward in addressing the key transport priority identified by the Local Enterprise Partnership, to alleviate congestion on the A1 Western Bypass. We will work together to attract new investment into the growing marine and offshore engineering sector, and to position Newcastle as a pioneer in the low carbon economy. And we jointly commit to more local arrangements for employment and skills, and to bring local, national and private sector investment together to build new homes on brownfield sites.

These commitments have been made possible through a tough negotiation between Newcastle and the government, with the support of the North East Local Enterprise Partnership, to identify barriers in the way of local growth and job creation. It is not the end of the City Deal process. We will continue to work together to tackle barriers to growth as they arise, supporting work across the North East to improve economic governance, and collaboration between local authorities and with the private sector. We will seize further opportunities for funding, power and responsibility to be secured locally, free from the constraints of a one-size-fits-all national policy. We will back strong local leadership to make the most of these opportunities, to secure a working city, within a strong and prosperous region.

Councillor Nick Forbes
Leader, Newcastle City Council

Paul Woolston
Chair, North East LEP

The Deal

Newcastle and Government have agreed:

- To create a NewcastleGateshead Accelerated Development Zone (ADZ), unlocking city centre growth.
- That Newcastle and Gateshead should benefit from new Tax Increment Financing powers, with all growth in business rate income generated within the four key development sites, covering 80 hectares, ring fenced by government and retained by the two Councils for 25 years.
- That, backed by the revenue stream created by localised business rates, Newcastle and Gateshead Councils will immediately initiate a £92 million investment programme, creating 600 construction jobs and leading to 1,500 permanent jobs within five years, and 13,000 over the next 25 years.
- To work together, with enhanced support for inward investment through UKTI, and the Centre for Offshore Renewable Engineering, to secure a further £500 million in private sector investment into the marine and offshore sector, with the potential to create 8,000 jobs across the North East.
- To establish Newcastle as a low carbon Pioneer City, working in partnership to deliver its smart city ambitions and carbon reduction target of 34% by 2020. The city will demonstrate good practice, and will receive support in accessing national and European funding, including Green Deal and heat network initiatives.
- To improve employment opportunities, through: co-location of services, sharing of data, more integrated working and co-financing between Jobcentre Plus and local services; implementation of a more effective employer-led skills system, including through the Newcastle Skills Hub; increasing apprenticeships by 15%; and delivering a locally-devolved NEET Youth Contract Pathfinder across Newcastle and Gateshead.
- To develop and deliver a Joint Investment Plan in partnership with the Homes and Communities Agency (HCA), using HCA resources and Newcastle's £25 million Future Homes Fund, to deliver 15,000 homes within Newcastle's urban area, and to improve the functioning of the housing market in Newcastle.
- To develop an investment programme to reduce congestion on the A1 Western Bypass, working with the Department for Transport, Highways Agency, Gateshead Council and local partners to reduce journey times on one of the most congested links in the national network; and to finalise an updated business case for the Lobley Hill scheme ahead of the next spending review period, enabling it to be considered for early delivery.
- To invest in super-connected broadband infrastructure, through £4-6 million investment from the Urban Broadband Fund, matched by a commitment from Newcastle City Council, alongside measures to stimulate demand and digital inclusion.
- To work with the seven local authorities represented on the North East Local Enterprise Partnership, to strengthen governance; including the option of a North East Combined Authority with a statutory basis, as a strong platform for further devolution of funding, powers and responsibilities.

Introduction and economic overview

The North East has made a long journey, from being a centre of the industrial economy in the 19th and early 20th century, through a radical transition, to the new and diverse economy of today. Striking this City Deal with Government will ignite the next phase of economic growth, contributing to the North East LEP's four main economic priorities of:

- Supporting Enterprise and Private Sector Business Growth
- Building on Key Economic Strengths
- Improving Skills and Performance
- Strengthening Transport, Connectivity and Infrastructure

Newcastle provides a major contribution to the productivity and competitiveness of the UK economy and is a significant driver of economic growth across the wider LEP area. It provides employment to almost 200,000 people; over half are commuters from the wider LEP area. It generates a quarter of the LEP area's GVA. Newcastle is home to two major universities; one of the country's largest financial and business service centres; a responsive education sector including major colleges and private sector training providers; and the UK's best hub of green technology services. Before the recent recession, Newcastle's economy performed well, with private sector employment growing more quickly than in any other major English city outside London.

Despite the recession, there is strong evidence of market confidence and investment:

- commitment from Virgin Money to locate its operational headquarters in Newcastle;
- private sector investments totalling over £100m in the marine and offshore sector;
- a major retail extension to Eldon Square completed in 2010, completely pre-let;
- retailers choosing to keep their shops open later into the evening as part of Newcastle's 'Alive After 5' initiative, with footfall increasing 15% over the past four years;
- £150m of private sector investment in Gateshead Town Centre.

Employment growth, combined with a stalled property pipeline, has led to the lowest property vacancy rate of any core city, with almost no new Grade A space now available. There is the potential for this to act as a brake on the economic recovery.

With unique green assets, low carbon sector strengths and pioneering research activities stimulated by world class universities, Newcastle represents a compelling location for knowledge-based, private-sector-led growth. This will supplement existing recognition as the most Sustainable City in the UK. The North East LEP has established a Low Carbon Enterprise Zone for the marine & offshore wind sector and ultra low carbon vehicles, and Newcastle University is developing geothermal heat sources in the City.

The North East is the only English region with a balance of trade surplus. We are committed to continuing to support our businesses as they seek to exploit global market opportunities, increase international trade and improve regional business competitiveness. Newcastle International Airport is a key asset for the entire North East for freight and business travellers. Improving connectivity into Newcastle is also essential, ensuring that employment opportunities can be accessed by the widest possible labour force, as is improving broadband infrastructure.

The city faces a number of economic and social challenges. The labour market continues to endure the legacy of inter-generational unemployment, a disproportionate number of young people not in education, employment or training (NEET), and a workforce which does not meet all the needs of the business community.

NewcastleGateshead Accelerated Development Zone

Newcastle and Government have agreed:

- to create a NewcastleGateshead Accelerated Development Zone (ADZ), unlocking city centre growth;
- that Newcastle and Gateshead should benefit from new Tax Increment Financing powers, with all growth in business rate income generated within the four key development sites, covering 80 hectares, ring fenced by government and retained by the two Councils for 25 years; and
- that, backed by the revenue streams created by localised business rates, Newcastle and Gateshead Councils will immediately initiate a £92 million investment programme, creating 600 construction jobs and leading to 1,500 permanent jobs within five years, and 13,000 over the next 25 years.

The aim of the NewcastleGateshead ADZ is to unlock growth across the urban core, returning the area to its pre-recession economic trajectory, which had seen more rapid employment growth in Newcastle than any of the other core cities. The ADZ is aligned with our economic strategy, which concludes that to reach our full economic potential we must grow the knowledge economy, develop and retain a skilled workforce, promote regeneration that is sustainable and stimulate growth in the urban core of NewcastleGateshead where we are at our most competitive.

The ADZ covers four key sites which offer significant growth potential over the next 25 years, where we can accelerate growth in the short and medium term:

- Science Central, offering opportunities for businesses to co-locate with Newcastle University.
- Stephenson Quarter and Central Station area, primed to become a major new office district in the next decade.
- East Pilgrim Street, an under-utilised area adjacent to the city centre's main business and retail district, set to become a substantial mixed-use development.
- Gateshead Quays and Baltic Business Quarter, a significant new mixed-use development, including an international conference and exhibition centre.

These sites currently face a number of obstacles which inhibit development: viability gaps, constraints in public and private sector finance and the requirement for significant up-front enabling infrastructure investment – including site preparation, demolitions, energy and utilities infrastructure, and highways improvements.

A coherent programme of infrastructure investment – to be financed through TIF – has been identified totalling £92m. This will lever in £800m of private sector investment and unlock significant development. It is expected to generate incremental annual business rates of up to £21m (and £320m in total) by 2038, enabling borrowing to be paid back by 2031.

The ADZ is forecast to generate 13,000 jobs, or 11,000 net of displacement and deadweight. Significant jobs growth is necessary if we are to reduce the 50,000 people currently receiving out-of-work benefits across NewcastleGateshead. We believe that the accelerated development and additional construction activity should also bring substantial benefits to HM Treasury, by bringing forward additional tax revenues and reduced benefit costs, assisting Government's deficit reduction programme.

The ADZ will be overseen by the Gateshead and Newcastle Partnership, which will be strengthened to provide greater transparency and accountability.

In order to implement the City Deal, Newcastle and Government have made a number of commitments:

Newcastle City Council Commitments	Government Commitments
<ul style="list-style-type: none"> • Newcastle and Gateshead Council will be responsible for successful delivery of the ADZ, using prudential borrowing to immediately initiate and procure a £92 million investment programme and ensure that the ADZ meets its ambitious economic targets. • Work with businesses and investors to lever £800m of private sector investment over 25 years, building on our excellent track record of public/private partnerships. • In addition to the £90m of investment released by the TIF, Newcastle and Gateshead Councils will invest about a further £100m within the ADZ area, on top of over £200m invested in recent years. 	<ul style="list-style-type: none"> • Agree to the retention of all business rate growth for 25 years in the 80 hectares outlined above. This will be used to finance infrastructure costs and enable the TIF scheme to go ahead. • UKTI to work with local partners to promote economic opportunities within the Accelerated Development Zone, in relevant key sectors.
<p>Impact: By 2018, it will have created over 1,500 permanent jobs, rising to 13,000 FTE jobs after 25 years. It will result in uplift in annual GVA of £520m, together with a range of wider economic and social benefits to the North East region. During the development period, it will bring a massive boost to the construction sector, supporting 600 construction jobs.</p>	

Energy, marine and low carbon

Newcastle and Government have agreed:

- to work together, with enhanced support for inward investment through UKTI, and the Centre for Offshore Renewable Engineering, to secure a further £500 million in private sector investment into the marine and offshore sector, with the potential to create 8,000 jobs across the North East
- to establish Newcastle as a low carbon Pioneer City, working in partnership to deliver its smart city ambitions and carbon reduction target of 34% by 2020. The city will demonstrate good practice, and will receive support in accessing national and European funding, including Green Deal and heat network initiatives.

The River Tyne has already become a centre of excellence for marine and offshore manufacturing, hosting a cluster of world-class firms. Over the past year, Newcastle alone has attracted over £100m in private sector investment, which will deliver 500 direct new jobs, with the potential for many more in the supply chain; winning work in competition with sites in Brazil, Malaysia and Germany. The NE LEP has prioritised the low carbon economy, with significant opportunities in our Enterprise Zone for the marine and offshore wind sector, and ultra low carbon vehicles.

Tyneside has the potential to become one of the premier locations in Europe for advanced offshore manufacturing. This reflects the cluster of existing activity, suitable sites, a skilled labour force, innovation in our universities and Catapult Centres, business networks, supply chains and proximity to the Dogger Bank offshore wind zone. The Government has designated Tyneside as one of five Centres for Offshore Renewable Engineering (CORE).

Growth of the low carbon, energy, marine and offshore sectors in the North East will be stimulated through expertise within, and opportunities to collaborate with, our universities and colleges. Businesses attracted to the Science Central – a key component of our Accelerated Development Zone – will be attracted through being able to offer co-locate with international academic expertise in areas including: sustainability science; transport technology; and marine technology.

Newcastle is recognised as the most Sustainable city in the UK by Forum for the Future. We also have an outstanding concentration of leading edge research, development and technology expertise and a cluster of renewable energy consultancies that are leaders in their fields. Between 2005 and 2009, Newcastle reduced its carbon emissions by more than any other major city in the UK.

Newcastle has committed to reduce carbon emissions by over 34% by 2020, from 1990 levels. The 1,800 metre bore hole at Science Central will provide the site with geothermal energy and potentially also meet the energy requirements of 11,000 homes and the city centre shopping mall, Eldon Square. We are leading regional authorities on a groundbreaking housing warmth programme, while the North East has the best electric vehicle charging infrastructure in the country.

In order to implement the City Deal, Newcastle and Government have made a number of commitments:

Newcastle City Council Commitments	Government Commitments
<ul style="list-style-type: none"> • Create a city-wide alliance of businesses, research and educational institutions involved in research, development and technology to enable new solutions that build on the city's carbon reduction targets (34% reduction by 2020, from 1990 baseline), green and smart city ambitions. • Work with NELEP to establish and promote the Enterprise Zone and the CORE, including by investing in infrastructure and by working with NGI and UKTI to provide dedicated inward investment resource. • Work with NELEP and the Technology Strategy Board to ensure the right economic environment to grow the low carbon economy and the Tyneside offshore advanced manufacturing cluster. • Work with neighbouring Local Authorities, a wide range of stakeholders, DECC and the Green Deal team to develop and deliver plans for 'Go Early' Green Deal roll out, making the most of opportunities to sustain and create green jobs, support local small and medium sized businesses and drive public awareness. 	<ul style="list-style-type: none"> • Continued support for investment in, and growth of, the Tyneside Centre for Offshore Renewable Engineering (CORE). • UKTI will work with the city, NGI and NELEP to develop an internationally competitive proposition to accelerate investment in the Tyneside offshore manufacturing cluster; with the objective of securing £500m in private sector investment in the next five years, creating 8,000 jobs. • DECC will work in partnership with the city and other departments to deliver Newcastle's smart city ambitions and carbon reduction target, through the low carbon pioneers programme. The city will demonstrate good practice, and will receive support to access national and European funding, including Green Deal and heat network initiatives. Additionally, DECC and the city will explore joint behavioural insight work on low carbon transport and the reduction of fuel poverty through improved domestic energy efficiency. • Government support will be identified throughout the collaboration.
<p>Impact: 8,000 additional jobs in the marine and offshore sector, with a target of £500m of investment.</p> <p>A leading role for Newcastle in securing the UK's carbon reduction targets</p>	

Strengthening employment and skills

Newcastle and Government have agreed:

- to improve employment opportunities, through: co-location of services, sharing of data, more integrated working and co-financing between Jobcentre Plus and local services; implementation of a more effective employer-led skills system, including through the Newcastle Skills Hub; increasing apprenticeships by 15%; and delivering a locally-devolved NEET Youth Contract Pathfinder across Newcastle and Gateshead.

It is vital to the strength of our economy, and to maximising employment prospects, that residents develop the knowledge, qualifications and employability skills necessary to succeed in the labour market. A strong skills base is vital for promoting the growth of our key sectors – some of which are currently citing skill shortages as a constraint on growth.

Worklessness remains a significant challenge in Newcastle, with 14% of residents receiving out-of-work benefits. In addition to its detrimental direct impact on individuals and families, unemployment is linked to wider social problems. Some families are responsible for disproportionate costs across the whole welfare system; while the number of young people not in education, employment and training (NEET) increases sharply at 18.

Newcastle City Council has confirmed its financial commitment to NewcastleFutures, a joint employment-support venture with Jobcentre Plus. It is a successful example of collaboration between a local authority and a national agency; it provides a strong and reassuring foundation for further devolution of employment support activity.

We are committed to improving the employability system in Newcastle further. Working with Jobcentre Plus, the Skills Funding Agency, local partners, the LEP and firms, we will deliver a better experience for customers, make efficiency savings and deliver better outputs. For clients with complex needs, or where they are making the transition from youth to adult services, this will include sharing data and developing a multi-agency approach – building on the Troubled Families initiative. Agencies will co-locate, share best practice and bring services into communities whilst reducing costs.

Recent changes to the skills system place a premium on high-quality, accessible information to make sure that young people (and older residents) make the right choices. Working in partnership with the LEP, educational institutions, the National Careers Service, Jobcentre Plus and employers, we will develop activities to raise skills levels, integrated with our economic development strategies which identify our key sectors and our investment plans, through the production of a City Skills Fund Action Plan. We will also set up a 'Skills Hub' to promote employment, career progression, apprenticeships and skill choices for individuals and firms in Newcastle and the surrounding area. This will be complemented by a website to provide employers with information on apprenticeship routes and local training providers. We also intend to work with local apprenticeship providers and firms to reduce the cost and risk of taking on an apprentice for SMEs, increasing apprenticeships by 15%, or 500. Government funding, through the City Skills Fund, will be used support these activities.

Newcastle and Gateshead councils will work together to support 16-17 year olds into Employment, Education or Training, through a Youth Contract pathfinder. The councils will create a locally-shaped solution which fits with existing council services, support provided by the voluntary sector and other providers to increase effectiveness of provision. This pilot will be assessed against locally set criteria and subsequent funding contingent on success.

In order to implement the City Deal, Newcastle and Government have made a number of commitments:

Newcastle City Council Commitments	Government Commitments
<ul style="list-style-type: none"> • Further investment in the NewcastleFutures partnership, a multi-agency body to get people back to work and improve services to customers. With firm proposals by Autumn 2012 around: <ul style="list-style-type: none"> ○ co-location of services to improve customer service; ○ case conferences, bringing together professionals working with those with complex needs; ○ moving towards a single customer relationship management system; ○ a shared intelligence point for local labour market data. • Production of a City Skills Fund Action plan (with the LEP), highlighting businesses priorities around skill needs and driving the creation of additional employment and apprenticeship opportunities. • Set up a central Newcastle Skills Hub, both physical and virtual, to integrate disadvantaged groups into the labour market, upgrade the skills of the low-qualified in employment and promote the development of skills which will meet the needs of the future economy. It will also promote apprenticeships, acting as a central point for applicants and helping to reduce costs to SMEs of taking on apprentices. • Newcastle and Gateshead Councils will work together to provide support to 16-17 year olds, creating locally-shaped provision for those who are, or are at risk of becoming, NEET. 	<ul style="list-style-type: none"> • City Skills Fund, which will be used to create a shared understanding of future skill needs of the local economy, to build capacity to develop solutions and to meet the start-up costs of setting up a Newcastle Skills and Apprenticeships Hub. • A renewed partnership with Jobcentre Plus, the National Careers Service and appropriate local agencies, including co-location and exchange of customer data. • Funding of around £1.7m over three years for support for 16 - 17 year old NEETs in NewcastleGateshead, as part of a Youth Contract Pathfinder.
<p>Impact: A more effective service to help more people into work whilst reducing costs; a boost to the economy, by ensuring that firms' skill needs are better met; and a 15% increase in apprentices (500 in Newcastle) within three years.</p>	

A devolved approach to housing policy and delivery better able to respond to local housing need

Newcastle and Government have agreed:

- to develop and deliver a Joint Investment Plan in partnership with the Homes and Communities Agency (HCA), using HCA resources and Newcastle's £25 million Future Homes Fund, to deliver 15,000 homes within the urban area, and to improve the functioning of the housing market in Newcastle.

New housing will play a crucial role in supporting economic growth in the city: providing an immediate boost through construction jobs; ensuring that there is a housing offer which supports economic growth; reducing existing strains on transport infrastructure and making sure that all communities benefit from the city's growth and prosperity.

With the HCA and Gateshead Council, we will create a Joint Investment Plan which will set out the details of the delivery of around 15,000 new homes in Newcastle (2,000 over and above current proposals) and 13,000 in Gateshead across a number of priority urban sites. It will also seek to reduce the 8,900 vacant homes (4% of stock) by a quarter. In addition to being a significant economic boost in itself, activity will be aligned with the broader economic strategy and overseen by a Board with senior representatives of Newcastle City Council and the HCA. It will be consistent with the objectives of the LEP and the HCA's sub-national Housing Stewardship arrangements.

We have strong evidence of the private sector failing to develop brownfield housing sites, from research, local knowledge of stalled sites and feedback from developers about the current lack of investment finance. A shortage of suitable homes contributes to significant commuting flows while there is a need to cater for 21,000 additional households in Newcastle over the next 20 years.

Newcastle City Council's contribution to these investment priorities will initially amount to £25m over the next five years – from the New Homes Bonus, S106 payments, capital receipts, Community Infrastructure Levy and prudential borrowing. It will be aligned with appropriate land assets and funding from HCA sources, including Capital Investment Resources and Capital Receipts from disposals. These resources will be assessed and considered in the customary way by HCA, but in the context of the strategic priorities established through the Joint Investment Plan.

Newcastle has an ambitious programme of housing growth but also faces issues of poor quality and choice in the private rented sector. The Council will also extend its advisory role, to provide assurance that people can find the right property and that their tenancy will be secure, and work with landlords to provide them with support and surety.

Where conditions are poor, we want to tighten regulation of the worst performing landlords, with faster enforcement action than Empty Dwelling Management Orders (EDMOs) and similar measures currently allow, including acquiring stock from the very worst landlords and enabling refurbishment and either cooperative ownership, or a return to the market.

We will reduce the number of empty homes by enabling individuals and communities to refurbish homes either individually or as a cooperative. We will seek to extend our Helping Hands programme, a local version of the low cost loan fund advocated recently by Channel 4. We will also assess opportunities to reintroduce support for bringing city centre and

other over-shop properties back in to residential use, and whether commercial properties could be converted into homes.

In order to implement the City Deal, Newcastle and Government have made a number of commitments:

Newcastle City Council commitments	Government Commitments
<ul style="list-style-type: none"> • Creation of a joint Board between the HCA and the council to establish and oversee a Joint Investment Plan. This will direct public and private sector housing finance to accelerate housing development, delivering 15,000 new homes in urban areas, creating over 30,000 new jobs and generating direct economic benefit of £4bn. • To use £25m of council resources (from the New Homes Bonus, capital receipts, and the Community Infrastructure Levy) in the next five years, in pursuit of the Joint Investment Plan. • Working with Gateshead Council, undertake a range of de-risking, investment and regulatory measures to improve the local housing market. • Explore opportunities to enable faster enforcement action against the worst performing landlords, working with DCLG. 	<ul style="list-style-type: none"> • The Joint Investment Board between the HCA and the Council will have strategic influence over the assets owned by HCA in the Newcastle City Council area. The Joint Investment Plan (which will reflect the work of the NewcastleGateshead Housing Advisory Board) will ensure that HCA assets and land – and other investment where appropriate – are pooled alongside land and investment from Newcastle and other partners with the aim of creating a shared return and achieving agreed outcomes. The HCA and council will adopt a simplified and aligned approval process for projects. • The HCA will consult with Newcastle, Gateshead, the North East LEP and others, about the future use of assets from the joint ventures Buildings for Business and OnSite.
<p>Impact: 15,000 new homes (2,000 over and above current proposals); 30,000 direct full-time construction jobs – including training and apprenticeship opportunities, direct economic benefit of £4bn; approximately £15m per annum in additional council tax.</p>	

Connectivity and Transport

Newcastle and Government have agreed:

- to develop an investment programme to reduce congestion on the A1 Western Bypass, working with the Department for Transport, Highways Agency, Gateshead and local partners to reduce journey times on one of the most congested links in the national network; and to finalise an updated business case for the Lobley Hill scheme ahead of the next spending review period, enabling it to be considered for early delivery.
- to invest in super-connected broadband infrastructure, through £4-6 million investment from the Urban Broadband Fund, matched by a commitment from Newcastle City Council, alongside measures to stimulate demand and digital inclusion

Strengthening transport, connectivity and infrastructure is one of the NE LEP's four strategic priorities. The A1 Western Bypass provides a key link for commuter, freight and business journeys across Tyneside. Figures from the Highways Agency suggest that the Lobley Hill to A184 stretch is the third most congested link on the national strategic road network, and the most congested regional link in terms of delay. According to a 2008 study, the average weekday traffic flow was approximately three times its theoretical maximum capacity.

Congestion on the Western Bypass is preventing the expansion of the successful Team Valley Trading Estate (which has reached capacity at 20,000 jobs, and has the potential to increase this by 4,000). Congestion is also a major constraint in bringing forward a number of major housing sites, needed to accommodate population growth. Detailed studies of the Lobley Hill/A184 proposal conclude that it could significantly reduce congestion and provide a strong value for money investment, significantly accelerating economic growth in this key transport corridor for the benefit of the North Eastern LEP Area.

The North East has one of the highest levels of exports in the country and is the only region with a balance of trade surplus. The number of North East companies involved in international trade is also increasing with 1,090 companies now exporting goods around the globe and a record 16% growth in exports compared to the preceding year. The market between the North East and North America is strong, but would grow significantly with direct connections. The development of a transatlantic connection from the airport is an established priority for the NE LEP and a key component of Newcastle's economic growth strategy. This builds on the successful introduction of scheduled services to Dubai, and the recently agreed route to Bergen. We will work with Newcastle Airport on landing this route.

Connectivity goes beyond transport infrastructure. Transforming Newcastle into a Super-Connected City, through the provision of world-class broadband, constitutes a major priority for the Council and its partners. Catalytic investment will boost market confidence that Newcastle is alive to the needs of businesses and striving to improve the city's economic prospects.

In order to implement the City Deal, Newcastle and Government have made a number of commitments:

Newcastle City Council Commitments	Government Commitments
<ul style="list-style-type: none"> • To establish a joint governance, delivery and accountability arrangement between Newcastle and Gateshead councils, DfT and the Highways Agency to address congestion problems on the A1 Western Bypass. This group will be responsible for aligning national and local resources for capital works, traffic management and sustainable travel initiatives. • Develop initiatives through the Tyne and Wear Local Transport Plan capital programme, to improve integration of the local and trunk road network. • Work with the LEP and partner local authorities to develop further local complementary measures for the post 2015 period as part of DfT’s devolving local major transport schemes process. • Invest £2.5 million in Tyne and Wear’s Urban Traffic Management and Control (UTMC) system to improve management of traffic, whilst implementing a series of behavioural change measures such as cycling and public transport promotion, using the Local Sustainable Transport Fund. • Work with Newcastle Airport to commission an updated economic study of the benefits of a transatlantic route and make the necessary investment from local resources to help in the introduction of that route. • Invest in super-connected broadband infrastructure, through £4-6 million investment from the Urban Broadband Fund, matched by a commitment from Newcastle City Council. 	<ul style="list-style-type: none"> • DfT and the Highways Agency to work with Gateshead and Newcastle councils to develop local transport investment proposals to address congestion problems on the A1 Western Bypass. • To finalise an updated business case for the Lobley Hill scheme ahead of the next spending review period, and to consider this in the prioritisation of future strategic road investment proposals for the next Spending Review. • Invest in super-connected broadband infrastructure, through £4-6 million investment from the Urban Broadband Fund, matched by a commitment from Newcastle City Council.
<p>Impact: Removal of a significant barrier to economic development on the corridor, reduction in congestion, improved journey time reliability and a reduction in accidents. World-class broadband connectivity, enhancing Newcastle’s competitiveness.</p>	

Leadership and governance

Newcastle and Government have agreed:

- to work with the seven local authorities represented on the North East Local Enterprise Partnership, to strengthen governance; including the option of a North East Combined Authority with a statutory basis, as a strong platform for further devolution of funding, powers and responsibilities.

Newcastle and its partners recognise the need to ensure strong leadership and governance arrangements, to drive forward the economy and assure the delivery of a complex programme, with new devolved powers.

Government recognises that the option of an elected Mayor was rejected by the people of Newcastle, who instead voted by a large majority to maintain the existing leadership arrangements for the city. Newcastle recognises the responsibility this places on the City Council to deliver effective leadership, working with partners to deliver a Working City, through strong, transparent and accountable institutions.

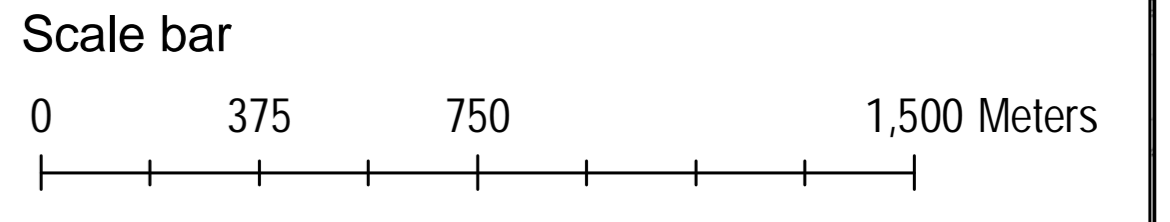
Each of the measures in the Newcastle City Deal delivers benefits to the wider north east, and have been developed with the support of the North East Local Enterprise Partnership. The Government has highlighted the potential benefits which might be secured from strengthened governance arrangements across the wider north east, covering the seven local authorities which together form the North East LEP. This would include the option of a North East Combined Authority, with a statutory basis. Government commits that, if the North East chooses to establish a Combined Authority, it would be regarded as a strong platform for further devolution of funding, powers and responsibilities, to be delivered through the Comprehensive Spending Review, and through further rounds of city deals. Newcastle City Council and Government are both clear that any progress to strengthen governance arrangements for the north east would be subject to agreement from its constituent local authorities, and consultation with other partners, including the North East LEP and the wider business community. Newcastle City Council supports the establishment of a Combined Authority, and commits to participate actively and constructively in those discussions.

ADZ Governance

Separately, the integrated nature of the sites in the NewcastleGateshead Accelerated Development Zone requires governance arrangements which enable joint decision making. This will help ensure that the ADZ reaches its full economic potential, whilst minimising financial risk. Newcastle and Gateshead therefore intend to further strengthen their Partnership, by giving it formal decision making powers and making it subject to greater public scrutiny and accountability.

ED 3.1 Allocations

Scale 1:13,000 @ A3 Date: 25/03/2010



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ED 3.1 Allocations

Scale 1:13,000 @ A3 Date: 25/03/2010



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Newcastle City Council:

Interim Newcastle Waste Site Appraisal Assessment

Planning and Housing Strategy Team

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Identification of Potential Sites to host Strategic Waste Management Facilities in Newcastle upon Tyne

NOTE TO READER:

This report identifies sites with the potential to host strategic waste management facilities. None of the short listed sites have been considered for allocation for waste management. The findings of the study do not imply local community support or owner agreement to such a use.

The assessment is technical only and does not therefore negate the need comply with national and local policy nor does it give a presumption that planning permission will be granted, or preclude other forms of development being acceptable.

The findings of the study reflect the circumstances at the time of survey in 2010. The assessment will be further reviewed as part of the update to the Newcastle Employment Land Review, in late Autumn 2011.

1. Introduction

1.1 Background

Waste management facilities can include a wide variety of waste related operations such as household waste reception centres, sorting facilities, materials recovery, scrap yards, end of life vehicle sites. For the treatment of secondary waste, composting, both open windrow and in-vessel and energy from waste facilities such as pyrolysis plants and gasification plants.

Government guidance requires that waste planning authorities identify sites and areas suitable for new and enhanced waste management facilities for the needs of their area. To this end the study seeks to identify potential sites to host waste management facilities, through a technical evaluation, based on planning criteria.

A proposal to develop a waste management facility on any of the identified sites would require more detailed evaluation, based on the facility being proposed, including an assessment of the environmental impacts and community consultation.

The report builds on the waste evidence for city, compiled as part of the preparation of the Municipal Waste Management Strategy (Newcastle Waste Strategy) and the Local Development Framework (see Newcastle City Council Municipal Waste Management and One Core Strategy Position Statement September 2011, Infrastructure Topic Paper and Waste and Minerals Joint Technical Paper).

1.2 Evidence of Need

The One Core Strategy must provide strategic policy to enable sites specific allocations and planning applications to be considered against. There will be a need to identify areas and sites suitable for strategic waste management facilities, commensurate with the Core Strategy's vision and growth ambitions.

The assessment undertaken seeks to identify areas or sites suitable to be allocated for waste management facilities, including recovery, recycling and the treatment of residual waste, and will inform a criteria based assessment for sites brought forward for development.

In summary, the Core Strategy DPD therefore must essentially address;

1. What waste management development and facilities are required?
(demonstrating that there are sufficient opportunities)
2. Where they could be located?
3. When they are to be provided?
4. How they will be delivered?

This report focuses on responding to item 2 of this list but is considered along side the other evidence base studies relating to waste streams.

In relation to municipal waste this report should be read along side the Newcastle City Council Municipal Waste Management and One Core Strategy Position Statement which together provide the evidence to respond to all of the items. The outcome of this evidence is brought together in the Joint Waste and Minerals Technical Paper which supports the Core Strategy's strategic approach and policy on waste. The site assessment also provided opportunity to review the suitability of the Council's existing strategic municipal waste management sites against the

national requirements as set out in PPS 10; Planning for Sustainable Waste Management.

With regards to non-municipal waste streams, this report will inform the Sub-Regional Commercial and Industrial Waste Assessment due for completion November 2011.

1.3 Purpose of the Study

The study aims to identify potential sites in appropriate locations to meet PPS 10 requirements. It builds on previous work undertaken as part of the Newcastle upon Tyne Employment Land Review (ELR) (June 2010). The ELR provides an up-to-date assessment of the supply of and demand for employment land and floorspace in Newcastle. The ELR has been undertaken in accordance with the three stage process outlined in the Government's Employment Land Reviews Guidance Note (December, 2004). This can be summarised as follows:

Stage 1 – Taking stock of the existing situation

Stage 2 – Creating a picture of future requirements

Stage 3 – Identifying a 'new' portfolio of employment sites

Almost 150 sites were identified for the ELR database. All these sites were assessed as part of the Waste Site Appraisal Assessment. The methodology used is outlined later in this report (chapter 2). The list of sites was progressively reduced though applying the agreed site selection criteria. Of the total list, 7 were identified as offering the most potential for the development of a waste management facility and therefore worthy of future consideration.

1.4 Site Requirements

At the outset of the study, site size requirements were established i.e. minimum requirements in terms of land take. This was based on available guidance provided by the Department of Communities and Local Government, the Environment Agency. The Welsh Assembly has also developed guidance, which is reasonably consistent with the other guidance.

Representative from the city Waste Planning Authority function at the Council concurred with the findings and agreed on the adoption of an absolute minimum site requirement of 1.0 ha for a waste management facility.

A summary of this evidence is provided in Box 1.

Box 1 Facility Area Requirements

<p>ODPM Planning for Waste Management Facilities : (2004 Research Study)</p> <p>Small scale recycling facility: 50 000 tonnes would require 1-2 hectares</p> <p>Mechanical biological treatment/ pyrolysis/ thermal treatment: 50 000 tonnes would require 1-2 hectares</p>
<p>Environment Agency Waste Technology Data Centre</p> <p>Small scale recycling facility: 60 000 tonnes would require 1-2 hectares</p> <p>Mechanical biological treatment/ pyrolysis/ gasification: 60 000 tonnes would require 1-2 hectares</p>
<p>Waste Strategy Unit, Welsh Assembly</p> <p>Small scale recycling facility: 80 000 tonnes would require at least 1-2 hectares</p> <p>Mechanical biological treatment/ pyrolysis/ gasification 80 000 tonnes would require at least 1.5 hectares</p>

1.5 Scope of the Study

Overall, this site search and appraisal exercise comprises two elements:

1. A search of potentially available commercial and industrial waste sites across the city;
2. A detailed evaluation of the potential sites remaining after the initial stages, including site visits; land availability, ownership status etc.

The methodology used to identify and appraise the potentially suitable sites is derived from the established principles of national waste planning policy. The approach also conforms to the principles and policies contained within the existing Newcastle upon Tyne Unitary Development Plan (Adopted 1998), Planning Policy Statement 10: Planning for Sustainable Waste Management (July 2005) and the

policies (45, 46 and 47) of the North East of England Plan Regional Spatial Strategy to 2021 (Adopted, July 2008).

As such, the focus has been on the acceptability of sites through a technical evaluation, based on agreed planning criteria. The emphasis has been placed on the potential suitability of a site in terms of environmental considerations (e.g. landscaping, heritage, conservation, flood risk etc), operational factors (e.g. accessibility, proximity to existing waste management facilities) and economic and social aspects.

This was a technical exercise and the findings of the study do not imply local community support or owner agreement to such a use.

2. Site Selection and Appraisal Methodology

2.1 Overview

A methodology was developed to identify potentially suitable sites for a waste management facility. This consisted of an elimination process based on agreed criteria and was conducted in two distinct stages:

- **Part 1:** Identification of potentially suitable sites through desk top surveys;
- **Part 2:** Detailed appraisal of sites identified as potentially suitable under Part 1.

2.2 Selection Team

In order to ensure cross divisional input, Planning Policy was supported in the selection process by officers from Development Management, Property Services, Waste Strategy and Transport Strategy.

2.2 Site Identification and Appraisal Criteria

Consistency with Previous Work

The methodology to both site identification and site assessment is consistent with – and draws upon previous work undertaken by the Council as part of the Employment Land Review carried out by the Planning & Housing Strategy team in 2009, as outlined in section 1.

Sub-regional alignment

The methodology used for the assessment is consistent with that undertaken by the neighbouring Tyne and Wear authorities, including the assessment to support the South of Tyne Waste Partnership of which Gateshead Council is included. This consistent methodology ensures alignment not only for the joint One Core Strategy but also with Newcastle's neighbouring authorities. It provides a consistency base to form strategic policy on waste management in the sub-region. This is especially important for waste management as the industry is very much market led, with 'proximity principle' of national guidance often extending beyond the sub-region and region.

Part 1: Identification of Potentially Suitable Sites

The applied methodology seeks to establish the existence and availability of potentially suitable sites and then to evaluate the availability and suitability of vacant or derelict sites, under-used land and sites allocated for employment uses in the adopted Newcastle upon Tyne Unitary Development Plan (Adopted 1998) and the ELR.

In view of the limitations placed on the Authority by the provisions of PPS10, it was agreed that the search for sites should concentrate on land identified as potential employment land.

Potentially suitable land for employment was identified through:

- Inspection of recent map bases and aerial photographs;
- A 'Call Out' for sites as part of the stakeholder consultation on the previous draft Core Strategy & joint One Core Strategy ;Of particular interest are those sites discounted as being unsuitable for residential uses;
- The application of existing local knowledge;
- Site visits

In addition, prior to the commencement of the current study, a review was undertaken of the existing waste infrastructure.

Part 2: The Appraisal of Potential Sites

Consistent with the methodology undertaken by the Council in its Employment Land Review (ELR) and Strategic Housing Land Availability Assessment (SHLAA) site selection process, the site appraisal made up of the following sieves:

- Pre Sieve- search for sites over 1 ha; only those sites meeting the site size criteria as outlined in Section 1.4 above are taken forward for assessment.
- Sieve 1 – the application of agreed planning constraints;
- Sieve 2 – consideration of the sequential approach of the Local Development Framework (LDF);
- Sieve 3 – other environmental, economic and operational considerations.

Pre-selection

On The Employment Land Review identified a total of 146 sites. Of these sites, 37 were identified as being highly unlikely to be available during the plan period for (re)development as a waste management site (through site knowledge and visits).

A further 58 sites were discounted as their size did not meet the minimum requirement for a strategic waste management site (1.0ha, see section 1.4)

After the pre selection process, 109 sites remained on the database for evaluation.

Sieve 1 – Application of Planning Constraints

Having established those sites that meet the minimum requirements for a potential strategic waste management facility, the first sieve seeks to identify where the development of a waste management facility would be unacceptable in land use planning policy terms. In this regard, **planning constraints** generally reflect the **firm** need to prevent development in certain locations, in keeping with the guidance provided by Annex E of PPS10. These factors, along with environmental considerations set out in the Newcastle upon Tyne UDP, have informed the development of the planning constraints.

For Newcastle upon Tyne, these areas are defined as follows:

- Internationally and nationally important nature conservation sites such as Special Areas of Conservation (SACs) and Sites of Special Scientific Interest (SSSIs);
- Internationally and nationally important archaeological designations such as

Scheduled Ancient Monuments (SAMs);

- Nationally significant amenity designations such as Green Belt;
- Designated development plan allocations (with the exception of general industrial locations and special policy areas).

Using GIS these constraints were mapped and sites in unacceptable locations identified.

Sieves 2 and 3 – Assessment of Sites

The approach to Stages 2 and 3 involved the application of national legislation and policy principles across the authority area.

The evaluation criteria in Appendix A reflect the desire to avoid development in certain locations. They relate to a site's configuration, the ability to secure safe and adequate access and the impact upon the amenity of adjacent and nearby land uses.

Although failure to meet these criteria does not preclude development outright, other sites or areas that do not negatively impact on these criteria may be considered more favourable in planning or operational terms.

Sieve 2 – The Sequential Approach

In accordance with national guidance, a sequential approach has been applied to identify preferred sites for waste-related development against the following criteria:

- The site's location in relation to settlement hierarchy (that is sites within urban areas should be afforded priority within the assessment process);
- The site's potential to contribute towards the regeneration vision of the City;
- The prioritisation of previously developed sites within existing industrial areas in accordance with policy ED3.1 of the Newcastle upon Tyne Unitary Development Plan

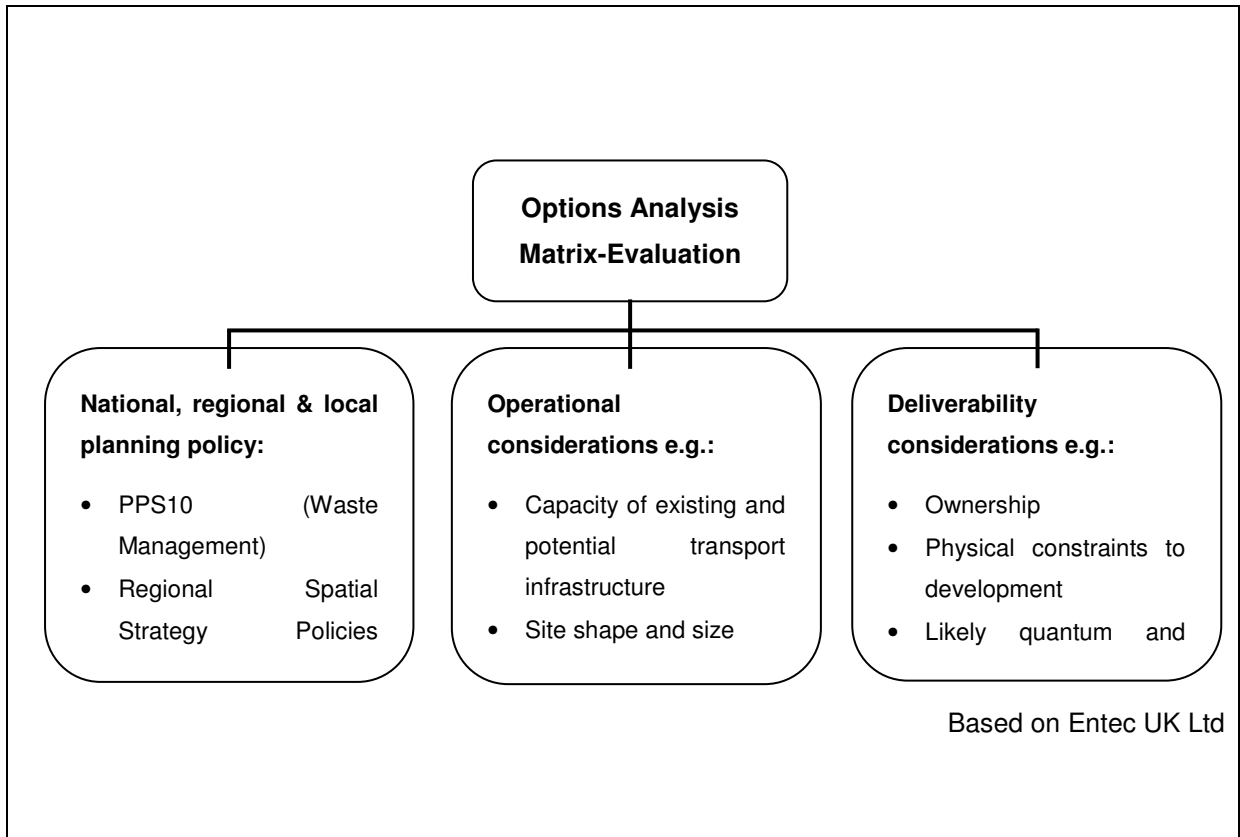
Sieve 3 – Other Environmental, Economic and Operational Considerations

At Sieve 3, sites are assessed against the range of considerations in Appendix B not already addressed in Sieve 2 but that indicate where the site performs more favourably, or weaker, against alternatives. The evaluation criteria address:

- Transport and accessibility considerations including:
 - Accessibility to the national road and freight network;
 - Relationship to, and accessibility from, the sources of waste across the City and to reduce cross boundary movements;
 - Junction capacity requirements to accommodate the waste facility on the site;
 - Access to the site from road and rail network and potential conflict of goods vehicles with pedestrian and traffic movements;
- Opportunity to accommodate a facility of a strategic nature by co-locating two or more facilities;
 - Proximity to existing waste management facilities and major areas of employment;
 - Potential of the site to reduce cross boundary movements of waste;
 - Deliverability and ownership; and
 - Potential to meet capacity requirements.

The Scoring Matrix

Box 2: Establishing the Site Appraisal Matrix



The scale of effect for the detailed assessment criteria has been assessed **qualitatively** through both desk-based and on-site appraisal. Broadly speaking, the following grading system was used:

5 -locating a facility at this location would significantly meet objective

4 -locating a facility at this location would marginally meet objective;

3 -locating a facility at this location would have no effect (or a neutral effect) on objective;

2 -locating a facility at this location would move marginally away from meeting objective;

1 -locating a facility at this location would move significantly away from meeting objective.

3. Findings

3.1 PRE-SIEVE: Discounted Sites due to Size

The following sites were discounted due to size. It was considered that any site under 1ha was too small to host a facility and therefore would not be subject to further assessment. The reference number refers to the identifier in the ELR database.

Table 3.1: Sites discounted due to size

Ref	Address	Location	Ownership	Likely Use	Site Area (ha)
1039	Lower Steenburgs Yard	Ouseburn	NCC	Mixed	0.77
1062	7-17 Lime Street	Ouseburn	Mixed	Mixed	0.16
1075	Land West of the Free Trade Public House	Ouseburn	Mixed	Mixed	0.22
1076	Plot 12 Quayside	City Centre	Private	Mixed	0.57
1077	Ouseburn West	Ouseburn	NCC	Mixed	0.50
1078	Former Ice Factory, Maling Street	Ouseburn	Private	Mixed	0.37
1090	Heaton Terrace, Shields Road West	East	NCC	General	0.25
1110	Heaney's, Land West of Hume Street	Ouseburn	Mixed	Mixed	0.31
1323	Terrace Place Car Park	City Centre	Private	Mixed	0.34
1328	Strawberry Place	City Centre	NCC	Mixed	0.86
1384	SafeStore (Former Heron Garage)	City Centre	Private	Mixed	0.68

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Location	Ownership	Likely Use	Site Area (ha)
1684	Westgate House	City Centre	Private	Mixed	0.24
1701	The Side	City Centre	Private	Mixed	0.12
3022	Percy Street West	City Centre	Private	Mixed	0.59
3031	Hanover Building	City Centre	Private	Mixed	0.10
3042	47-49 Lime Street	Ouseburn	Private	Mixed	0.18
3064	Maling Street	Ouseburn	Mixed	Mixed	0.30
3066	Stephen Eastern	Ouseburn	Private	Mixed	0.14
3070	Violet Close and Buddle Road	Inner West	NCC	General	0.97
3077	Heber Street and brewery office	City Centre	Private	Mixed	0.71
3079	Pitt Street Site	City Centre	NCC	Mixed	0.37
3103	Atkinson Road	Inner West	NCC	Mixed	0.40
3302	Clavering Place & Hanover Square	City Centre	Private	Mixed	0.20
3374	Collingwood Buildings	City Centre	Private	Mixed	0.18
3391	2-4 Hanover Square	City Centre	Private	Mixed	0.17
4211	NGP Officer Block D, Cell C	North	Private	Office	0.49
4223	Former Tyne Tees Studios	City Centre	Mixed	Mixed	0.70
4289	Quay Timber Site	Ouseburn	Private	Mixed	0.24

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Location	Ownership	Likely Use	Site Area (ha)
4290	Ince Site	Ouseburn	Private	Mixed	0.19
4292	CWS Engineering Depot	City Centre	Private	Mixed	0.45
4293	55-57 Quayside	City Centre	Private	Mixed	0.10
4329	NCC Coach Park	City Centre	Mixed	Mixed	0.35
4331	Skinnerburn Road B	City Centre	NCC	Mixed	0.21
4332	Skinnerburn Road A	City Centre	NCC	Mixed	0.21
4374	AMC Dismantlers, Union Street	Ouseburn	Private	Mixed	0.17
4438	Dobson's Yard, Wincombee Road	East	NCC	General	0.85
4542	Lime Street	Ouseburn	Private	Mixed	0.10
4543	Winns Products, Shieldfield Industrial Estate	Ouseburn	Mixed	Mixed	0.22
4544	Upper Steenberg's- Lower Plateau	Ouseburn	Private	Mixed	0.26
4546	St George's Car Park and TA Centre	City Centre	Mixed	Student Accommodation	0.43
4733	Charlton Bonds Building	City Centre	NCC	Offices	0.08
4756	Dolphin Street Community Centre, Dolphin	Inner West	NCC	General	0.07
4758	Phoenix Works, High Street, Newburn	Inner West	Private	General	0.66
4759	Kelly Plant	Ouseburn	Private	Mixed	0.06
4760	Land at Junction of Byker Bank and Ford Street	Ouseburn	Private	Mixed	0.10

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Location	Ownership	Likely Use	Site Area (ha)
4761	Scottish Life House Extension	City Centre	Private	Offices	0.28
4762	Forth Yard East inc Kings House	City Centre	Private	Mixed	0.34
4949	Site of Wellbar House	City Centre	Private	Mixed	0.49

3.2 SIEVE 1: Planning constraints, desk based assessment

The following sites were not considered suitable to progress to Sieve 2. It should be noted, that although some of the scores appear relatively high, these sites were determined unsuitable to progress due to their proximity to established residential areas or existing commitments, such as existing planning permissions, which the Council is confident will be delivered. These are referenced in the 'description' and 'constraints' columns of table.

Table 3. 2: Sites discounted due to planning constraints

Ref	Site Name	Area	Description	Constraints	Score (1-45)
1035	Spillers Quay	Ouseburn	Significant vacant water front site, former deep water berth for shipping.	Identified in the 1NG 'Phase 1: Ouseburn and East Quayside Development Framework' to come forward for leisure and commercial uses. 3,150 sqm and potentially 6,505 sqm of B1 floorspace. Site was subject to flood risk	24
1038	Ouseburn Central	Ouseburn	Significant site within Ouseburn Regeneration Area	Central Ouseburn SPD identifies site for B1 led redevelopment; Site within Conservation area.	21
1056	Portland Road Phase 2	Ouseburn	Committed for student village.	Planning permission in place 2009/0045/01/DET, confident that permission will be implemented	33
1313	East Pilgrim Street Masterplan area	City Centre	Part of site is the core shopping area and will be included in the Urban Core AAP. The East Pilgrim Street Interim Planning Guidance is in place to guide development proposals.	Adjacent to historic Grainger Town area and the core shopping area	28
1331	St James Metro Station	City Centre	Vacant city centre site, currently being used as a surface car park managed by City Council.	Prominent city centre location.	25
1398	South of	City	Prominent gateway site when entering the city	Site is in close proximity to the City Wall (SAM)	25

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Constraints	Score (1-45)
	pottery lane	Centre	centre	and listed buildings. It is also in close proximity to a conservation area and public open space,	
1400	Stephenson Quarter	City Centre	Prominent city centre location, near to Central Station, outline planning permission in place	Site on edge of site boundary within 250 of SAM, also Grade II listed building within the site boundary.	27
1407	Blandford Square	City Centre	City centre location	Site constrained by transport links. Likely that development could have impact on the setting of Grade II listed buildings, adjacent to the site. The site is adjacent to a conservation area and public open space and green network	27
1411	Former brewery bottling plant	City Centre	Prime city centre location, with planning permission 2008/1116/01/DET Site is part of the Science Central Masterplan and is committed through partnership agreements.	Site constrained by transport links. Likely that development of the site could have impact on the setting of Grade II listed buildings, adjacent to the site. The site is also adjacent to a conservation area and public open space and green network	27
1412	Main brewery site	City Centre	Regionally significant site	Site is in close proximity of the City Wall, it is likely development of the site will have impact on the setting of Grade II listed buildings, adjacent to the site. Adjacent to a conservation area, public open space and the green network.	25
1515	Loadman Street	Inner West	Large cleared brownfield site	Committed through Benwell Scotswood AAP Adjacent to residential area and site has planning permission for housing	40

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Constraints	Score (1-45)
1616	Caroline Street and Maria Street	Inner West	Mixed use site	Committed through Benwell Scotswood AAP Very close proximity to residential Wildlife corridor north east of site	40
1713	Southside, Newcastle Airport	North	Regionally significant site	Committed for airport related uses in the UDP and the emerging ELR Flood risk identified. Water compatible use preferred.- Mitigation could be explored; Adjacent to Greenbelt	33
2644	Newcastle Great Park (NGP) Cell A	North	Greenfield Site but committed through RSS, UDP and existing planning permissions in place	Identified as a key strategic employment site, of national and regional importance; The likelihood is that the site will come forward for both housing and employment use.	38
2646	NGP Cell C	North	Committed through RSS, UDP and existing planning permissions in place	Identified as a key strategic employment site, of national and regional importance The likelihood is that the site will come forward for both housing and employment use	38
3025	General Hospital Site	Inner West	Former hospital site, allocated for mixed use development in the BSAAP	Residential to north, east and west.	33
3067	Morley's, Albion Row	Ouseburn	White land, in commercial area. Part of Ouseburn Masterplan Area	Grade II Listed Building adjacent site boundary, therefore development of the site would need to be sensitive to the setting of Grade 2 Listed buildings. The site is also adjacent to Conservation Area and public open space	25
3068	Cement works and scrap yard	City Centre	Prominent gateway site when entering the city centre	Site is in close proximity of the City Wall, it is likely development of the site will have impact on the	25

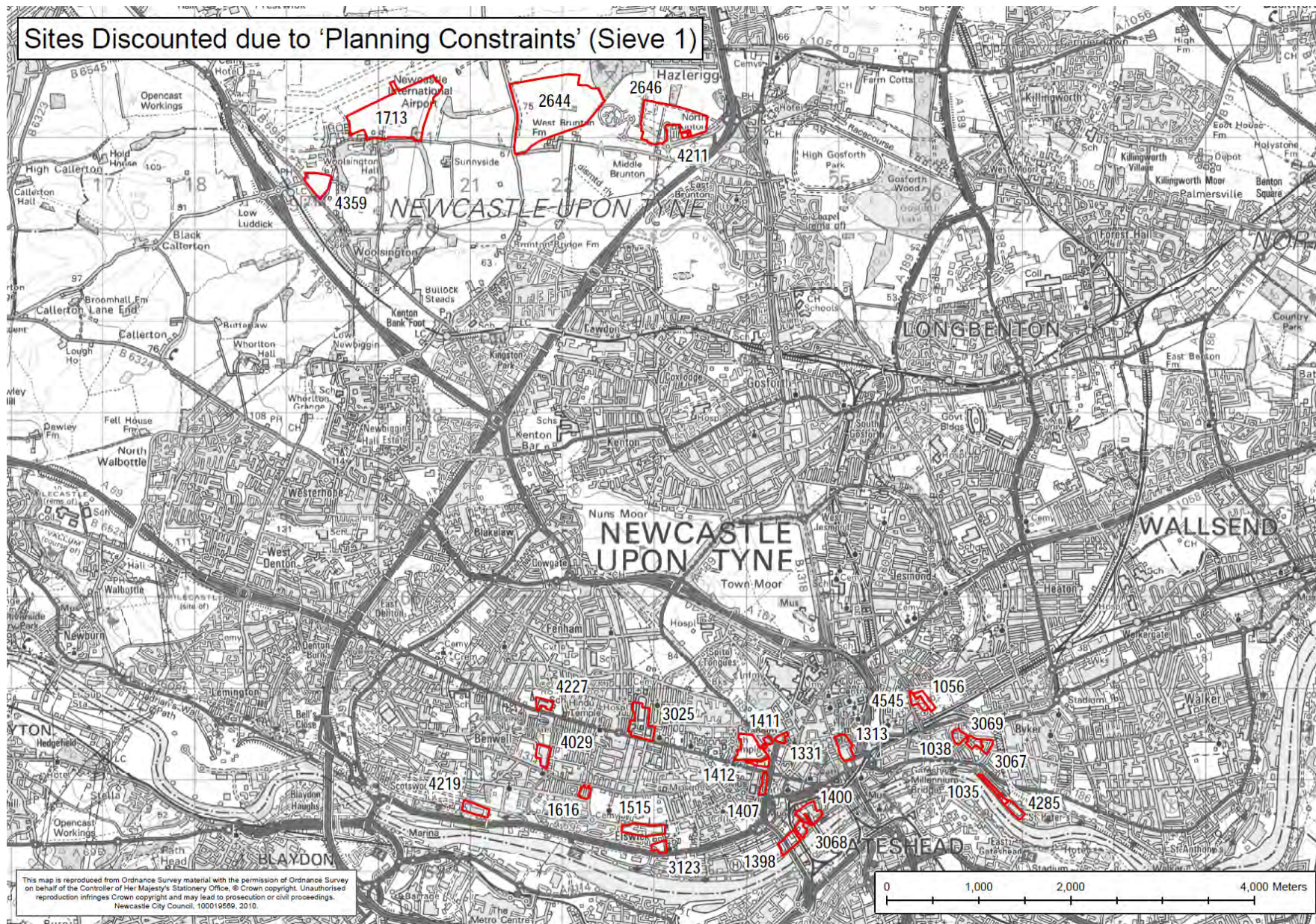
Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Constraints	Score (1-45)
				setting of Grade I listed buildings, adjacent to the site.	
3069	GD Metal Recycling, Quality Row	Ouseburn	Site within Ouseburn Regeneration area	Grade II Listed Building adjacent site boundary, therefore development of the site would affect the setting of Grade 2 Listed buildings. The site is also adjacent to Conservation Area and public open space	24
3123	Former Mary Trevelyan School	Inner West	White land adjacent to main movement corridor (Scotswood Road) and Noble Street Industrial Estate	Residential and nursery to the northern boundary. Wildlife corridor to southern boundary.	38
4029	Condercum Road West	Inner West	Existing mixed commercial area in the west end of city	Committed as part of BSAAP, comprehensive redevelopment required.	40
4211	NGP Office Block D Cell C	North	Regionally significant site	Greenfield site with planning permission (reserve matters)	38
4219	Whitehouse Enterprise Centre	Inner West	Existing mixed commercial area, includes B2 uses, a car showroom and a public works depot	Allocated in the BSAAP for mixed use development	40
4227	Westgate Community College	Inner West	Site committed as part of Benwell Scotswood AAP	Immediately adjacent to SAM	31
4285	Spillers Mill, Quayside	Ouseburn	The regeneration of Spillers Quay and Spillers Mill is a long prospect for the city.	Prominent site at the edge of the urban core, location of a waste management facility would prejudice comprehensive redevelopment of the area. Flood risk identified at the site	27

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Constraints	Score (1-45)
4359	South of Freight Village, Airport	North	Regionally significant site	Committed for airport related uses in RSS, UDP saved policies and the emerging ELR. Will need to consider impending Airport Masterplan; Adjacent to Greenbelt	39
4545	Portland Road Phases 1A & B	Ouseburn	Committed for mixed use development	Planning permission in place 2009/0046/01/DET, confident that permission will be implemented	33

Identification of Potential Sites to Host Strategic Waste Management Facilities



3.3 SIEVE 2: Sequential approach

The following sites were not considered suitable to progress to Sieve 3, following a desk based assessment.

Table 3.3: Sites discounted after sequential approach

Ref	Site Name	Area	Description	Conclusion from Sieve 1	Score (1-50)	Constraints from Sieve 2	Score (1-70)
2758	Cutty Coats	Outer West	Greenfield site, northern perimeter of existing industrial estate.	Abuts Green Belt Close to Walbottle Dene	37	Some accessed required through residential area Residential and SSI in close proximity to site	49
4547	Newcastle Arena	City Centre	Current location of Arena and car park	Highly accessible location in terms of road, rail and river links. Shape of site does not preclude development.	45	Due to established existing use any development of the site expected to be come forward in the very long term (+15years) ,	55
4757	Land adjacent to DSS Offices	East	Cleared site in existing office location (edge of centre)	Suitable in terms of size and shape but is located on a business park which is largely occupied.	45	Sustainable location considered a suitable housing or employment site, waste facility would prejudice this. Access to strategic road network without passing through sensitive or residential areas	38

3.4 SIEVE 3: Other environmental, economic and operational considerations

Sites discounted following detailed assessment, included site visits

Table 3.4: Sites discounted after environmental, economic and operational considerations

Ref	Site Name	Area	Description	Sieve 1 Score (1-50)	Sieve 2 Score (1-70)	Stage 3: Site Visit Conclusions	Conclusion
1297	Walker Riverside North	Outer East	Shepherd Offshore, Walker Riverside North. Flat cleared site of and remediated former shipyard.	45	64	Only the eastern portion of the site is beyond 250m from residential Good access from Fisher Street. Site protected under saved Policy ED 3.1 Walker Riverside. Neighbouring authority would be required to be consulted on any planning application	Potential site
1374	Forth Goods Yard	City Centre	Large underused site with existing railway sidings and surface parking.	45	55	Limited site access (restricted height access or articulated waste carrying vehicles). Residential and hotel uses in close proximity Visible from Redheugh Bridge and Gateshead (impact on strategic views and Windmill Hills Town Park Gateshead)	Site not suitable
1502	Scotswood Bridge Head	West	Prominent location when viewed from Scotswood Road, however is a relatively small and isolated site.	41	57	Limited site access, with the site sloping steeply from north to south. Residential area in close proximity Western part of site Council owned and forms part of the Scotswood Masterplan so may not be useable. Eastern part is privately owned and a business operates from this site so this would need to be acquired.	Site not suitable

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Sieve 1 Score (1-50)	Sieve 2 Score (1-70)	Stage 3: Site Visit Conclusions	Conclusion
2703	Sandy Lane, Brunswick Industrial Estate	North	Cleared site in established industrial estate in the north of the city.	43	60	Access to site goes close to residential properties, Green belt set directly to north, south and west beyond existing industrial units. Expected for industrial or commercial use only	Site considered suitable
2794	Shelly Rd, Newburn Industrial Estate	West	Previously rail land, now vacant with tree cover to all boundaries.	38	52	Wildlife corridor runs through site to the north, site falls within Newburn Battle Field (UDP Saved Policy C4.1). In proximity to residential area, housing development on the site could be viable, as well as an extension to the existing industrial park.	Site not suitable
2802	Newburn Riverside	Outer West	One North East's Newburn Riverside Business Park	37	58	Site considered suitable, near to existing industrial uses, with good road access.	Potential site
2804	Newburn Haugh Allotments	West	Cleared brownfield site in the west of the city, close to the river. The site itself is flat but on raised land.	38	55	Limited site access (through site 3359) Possible conflict with Lemington Cone Grade 2 * Site set considerably lower than neighbouring commercial use- possible conflict with scale of building in relation to the higher ground level In close proximity to residential area.	Site not suitable
3052	Siemens, Shields Road, South	East	Large cleared, former industrial site in the east of the city. The site is flat with no major topographical features.	43	60	Access good, from north via Shields Road, Hadrian's Wall (UDP Policy C4.1) falls to south of site, south east of the site is in close proximity to existing residential	Site not suitable

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Sieve 1 Score (1-50)	Sieve 2 Score (1-70)	Stage 3: Site Visit Conclusions	Conclusion
3210	Siemens Shields north	East	Large cleared, former industrial site in the east of the city. The site is flat with no major topographical features.	45	58	Council owned site that forms part of the proposed Fossway Masterplan, intended to be designated for general commercial use. However there are currently no agreements in place on this site. Compatible use- possible conflict with residential are	Potential site
3359	Lemington Glassworks	Outer West	Currently in use as a caravan storage park, adjacent to Newburn Haugh Industrial Estate	39	59	Limited site access Possible conflict with Lemington Cone Grade 2 *. Site set considerably lower than neighbouring commercial use- possible conflict with scale of building in relation to the higher ground level	Site not suitable
3360	Lemington Caravan Park	Outer West	Undeveloped brownfield site surrounded by industrial uses	40	60	Compatible uses surround, screened from residential by existing uses and topography	Potential site
4137	A&P Yard, Walker Riverside	Outer East	One of 3 sites that make up the Walker Riverside UDP allocation.	39	57	Expected for industrial use only In close proximity to residential, site also within boundary of North Tyneside authority.	Site not suitable

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Site Name	Area	Description	Sieve 1 Score (1-50)	Sieve 2 Score (1-70)	Stage 3: Site Visit Conclusions	Conclusion
4709	Newcastle Heliport	West	White land, currently operating as a heliport	45	56	Limited site access, Skinnerburn Road has poor layout with sever congestion along length making access difficult and potentially dangerous. Owner of site keen for residential development Highly visible from Gateshead, potentially harmful views from Old Redheugh Bridge Gas holder which also shares access, site falls within red and green zones	Site not suitable
n/a	Benwell Transfer Station	West	Existing waste transfer station off Scotswood Road, west Newcastle.	41	68	Existing city deport, Planning Permission granted 20.05.2005 for erection of waste transfer station and civic amenity of this site	Potential site
n/a	Byker Transfer Station	East	Existing waste transfer station off Walker Road, east Newcastle.	43	59	Compatible use. Use of this site for proposal would prevent addition trip generated across the city.	Potential site

3.5 Sites identified as having potential

The Council has undertaken a 'search for sites' to identify potential sites suitable for a strategic waste management facility as required to support the Council's LDF. The 'sieving' process resulted in a shortlist of 14 sites, which were then evaluated more closely including a site visits. Of the 14 considered in 'Sieve 3', 7 were considered likely to be suitable in planning terms to accommodate a strategic waste management facility, this are summarised in Table 3.5.

Table 3.5: Sites identified as having potential to host a strategic waste management facility

Ref	Location	Site area (ha)	Ownership	Surrounding areas	Constraints or Infrastructure requirements	Market Appraisal	Conclusion
2703	Sandy Lane, Brunswick Industrial Estate	1.1	Privately owned	Industrial	Access to site goes close to residential properties, Green belt set directly to north, south and west beyond existing industrial units	Expected for industrial or commercial use only	Negotiation would be required with site owner. Development would need to have consideration to PPG 2 and UDP Saved Policy GB1 (impact of visual amenity of Green Belt)
2802	Newburn Riverside	51	Privately owned (One North East)	Industrial, commercial and offices	Establishing business/ industrial park	Dependant on ONE 's aspirations for the area, waste facility may sterilise the remainder of the development	Negotiation would be required with site owner

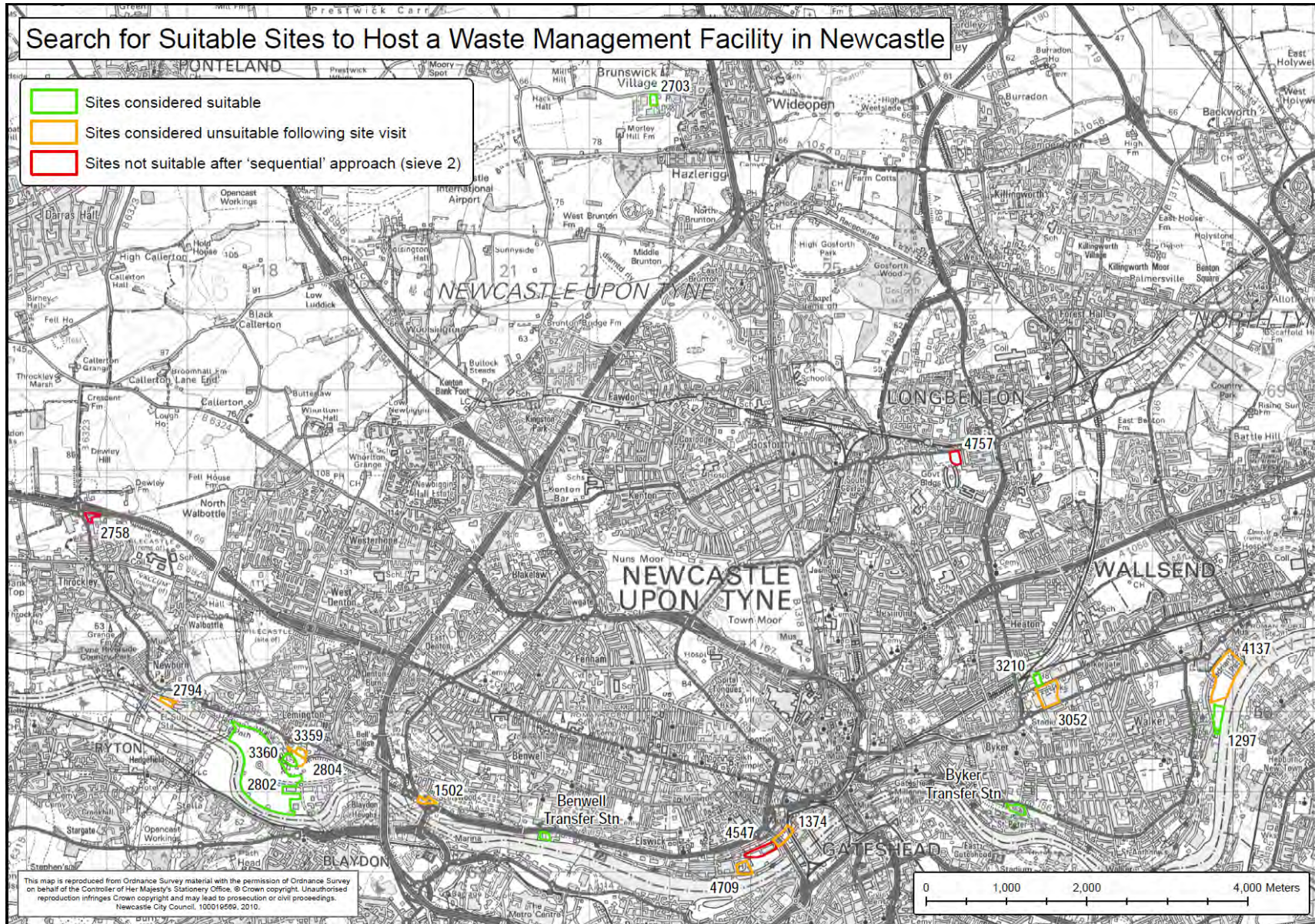
Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Location	Site area (ha)	Ownership	Surrounding areas	Constraints or Infrastructure requirements	Market Appraisal	Conclusion
3052	Siemens South Side, Shields Rd North	6.8	Council owned	Opposite Chillingham Industrial Estate, the site is in close proximity to residential	Hadrian's Wall falls south of the site (Saved UDP Policy C4.1)	Expected for industrial or commercial use only; development of a waste plant could compromise the Fossway Strategic Framework	The Council's Urban Design Team are currently preparing a strategic framework for the Fossway Development Area. This involves looking at the development blocks on the IRDL and the two Siemens sites, links between them, and to the surrounding area. Improvements to the highway network are crucial to this process.
3360	Lemington Caravan Park, Riversdale Way	1.9	Council owned	Industrial	Wildlife corridor runs through site to east	Expected for industrial use only. Council has granted 1 year to developer to put together a development proposal for the site. Feasibility may be dependant on the developer acquiring the adjacent Newburn Haugh Allotments site.	Dependant on whether a years exclusivity is taken up to if negotiations would be necessary. The site appears acceptable in planning and operational terms due to surrounding existing uses and site's topography.

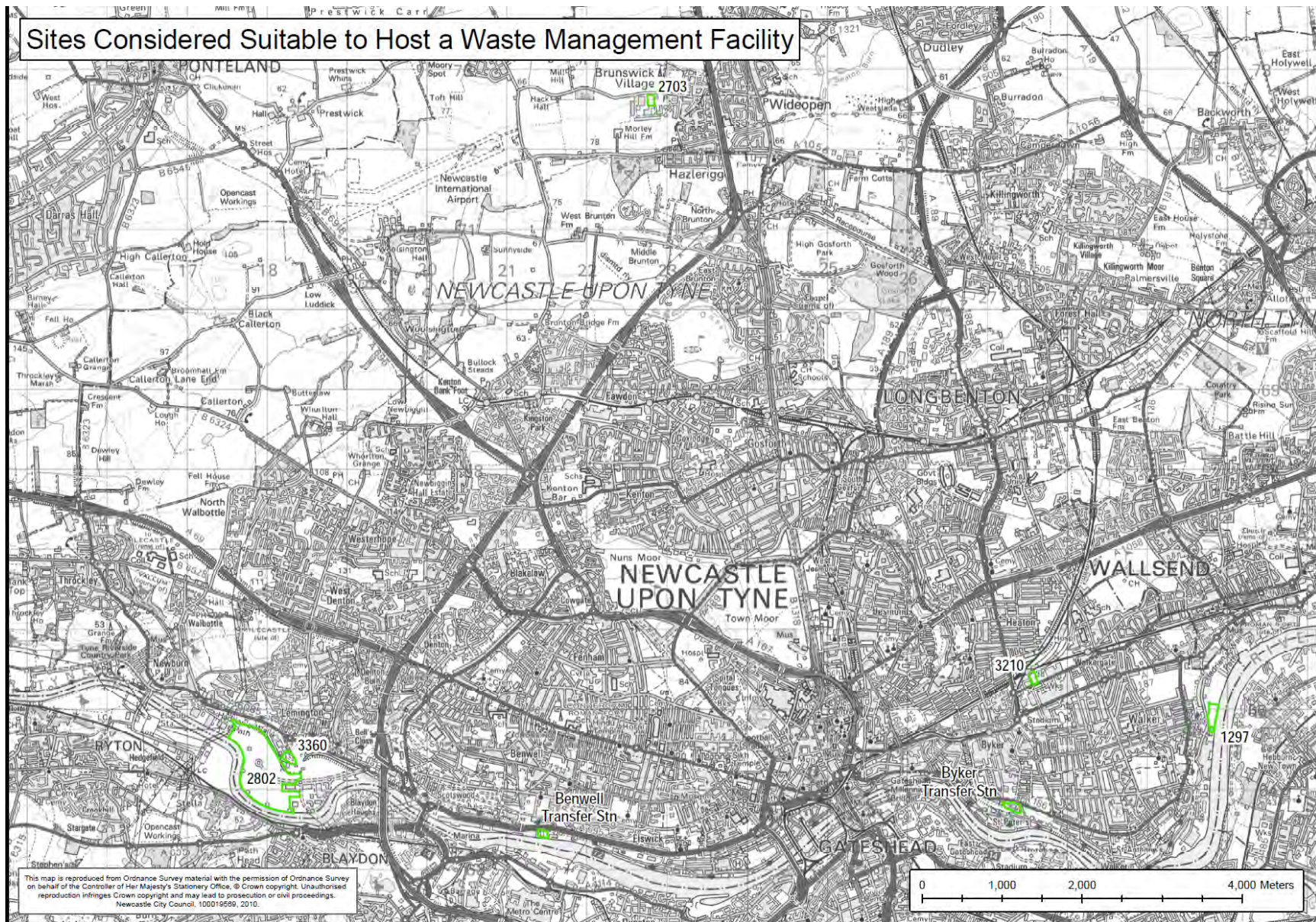
Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Location	Site area (ha)	Ownership	Surrounding areas	Constraints or Infrastructure requirements	Market Appraisal	Conclusion
1297	Walker Riverside North	20	Mixed Ownership	Industrial and residential in proximity	The eastern part of the sites proximity residential, site within boundary of North Tyneside	The site is subject to 3 different lease agreements (125,150 and 99 years respectively). Part of the eastern end of the site is outside the City Boundary (North Tyneside). Development of Neptune Yard, Energy Yard.	Negotiation would be required with lease holders, however site's existing development is compatible. The location of the facility would have to be on areas of the site that are greater than 250m distance from existing residential.
n/a	Byker Transfer Station, off Walker Road		Council owned	Industrial and residential	Residential in proximity, long history of community opposition. Site has additional capacity, however further consideration would be required once capacity requirements are known	Expected for industrial use only	Existing use already at site. Proposed additional facility appears acceptable in planning and operational terms, however, likely to be subject to political and community opposition.
n/a	Benwell Transfer Station, Scotswood Road	1.2	Council owned	Industrial	River Tyne Wildlife Corridor runs east and west of the site	Expected for industrial use only	Existing use already at site. Proposed additional facility appears acceptable in planning and operational terms.

Identification of Potential Sites to Host Strategic Waste Management Facilities



Identification of Potential Sites to Host Strategic Waste Management Facilities



4. Conclusions for the Local Development Framework

The results of this assessment and the sites identified in Table 3.5 will inform the policy approach taken forward in the Core Strategy. The findings, such as the location and existing use at the sites will inform the 'sequential' policy that will need to be adopted in the One Core Strategy for assessing proposals for waste management sites. From the location of the sites broad areas of suitability will be able to identify and these will be formally outlined in the One Core Strategy as required by PPS 10.

The evidence from the Newcastle City Council Municipal Waste Management and One Core Strategy Position Statement is indicating that the Core Strategy will not need to allocate the sites, but identify potentially suitable sites or areas on a key diagram to direct development.

The existing strategic waste management sites at Benwell and Byker are within the shortlist of potential sites. This means the sites are considered to remain suitable in planning terms and will be identified as 'strategic' for the delivery of municipal contractual arrangements for municipal waste up to 2024 within the One Core Strategy waste policy. As a result of being identified as 'strategic' these sites will need to be safeguarded within the Core Strategy. This provision will provide security that a site will be suitable in planning terms for waste management post 2024, this remains unless arrangements are made for the managing waste at an alternative site/s within the Core Strategy plan period.

Due to the long lead-in time between evidence preparation and plan adoption, this assessment along with the Employment Land Review will be reviewed prior to the completion of the Submission Draft of the One Core Strategy in 2012. The review will take into account the findings of the sub-regional Commercial and Industrial waste evidence for the LDF due in November 2011.

Appendix A: Proformas

Site Ref		Site Name				
Pre Sieve: Physical Size and Shape (Minimum site requirement of 1 ha identified for a strategic site waste management facility)						
Site area of 1 ha or more	Yes / No					
Sieve One: Application of Planning Constraints (desk based assessment)						
Subject Area	Objective	Indicators	Thresholds of Concerns	Source of Information	Score (1-5)	Rational/ Comments
1. Cultural Heritage	To prevent development on sites or structures of international importance	World Heritage Sites	Any direct impacts	Hadrian's Wall shapefile		
	To prevent development on sites or structures of national importance	Scheduled Ancient Monuments (SAM)	Any direct impacts	Shapefile		
		Grade 1 Listed buildings/ historic parks and gardens	Any direct impacts	Shapefile		
		Grade II* Listed Buildings	Any direct impacts	Shapefile		
		Conservation areas	Any direct impacts	Shapefile		
		Green Network / Open Land	Any direct and indirect impacts	Shapefiles		
2. Water	To avoid any impact on the	Surface water (e.g	Any direct	Shapefiles		

Identification of Potential Sites to Host Strategic Waste Management Facilities

Environment	hydrological regime	rivers)	impacts			
	To avoid development in the indicative floor plain	EA Flood Risk Maps	Flood Zones, 2,3 3a, 3b	EA Flood Risk Maps		
3. Nature Conservation	To avoid any development that would impact on sites of national importance	SS1, RAMSAR sites, SPAs, SAC	Any direct impacts	Shapefiles		
4. Land Use	Health and Safety Executive	HSE Inner Zone	Exclusion Zone- Middles and Outer Zones	Shapefiles		
Sieve 1 Total						
Sieve Two: The Sequential Approach (desk based assessment)						
Subject Area	Objective	Indicators	Thresholds of Concerns	Source of Information	Score (1-5)	Rational/ Comments
1. Land Use	To maximise the use of brownfield land and redundant buildings	Land previously developed and existing redundant buildings		Shapefile		
	To locate facilities within or adjacent to industrial areas	Location of industrial areas		UDP shapefiles/ ELR shapefiles		
	To locate facilities that are accessible and in close proximity to large urban areas	Facilities centrally located close to where the waste is produced		UDP boundaries		
	To co-locate waste management / related facilities	Facilities located in close proximity to one another		EA licence information		

Identification of Potential Sites to Host Strategic Waste Management Facilities

	To locate facilities on degraded, contaminated or derelict land	Land of a derelict degraded or contaminated nature		Historical maps		
	To avoid prejudicing non-industrial designated development plan land uses (e.g. housing, tourism, recreation etc)	Land use allocations, zones and proposals in the 'local plan'	Any direct impacts	UDP shapefiles		
	To promote sites in locations that avoid access through residential areas and sensitive land uses	Residential areas and sensitive land uses	Any direct or indirect impacts	OS maps, LTP, UDP shapefiles		
	To avoid unnecessary development within the Green Belt	Land designated in the development plan as green belt	Any direct impacts	UDP Shapefile		
2. Traffic and Transportation	To promote sites with good access to major junctions in road network	>1 km from primary route network		LTP shapefiles		
	To promote modes with good access to alternative modes of transport			LTP shapefiles		
	To promote development sites with good access to primary route network	Good standard of highway access	Access below highway standard or through residential areas	LTP shapefiles		
3. Natural Environment	To consider the effect of development on identified sites of county/ local importance	LNR and wildlife sites	Any direct or indirect impacts	Shapefiles		
	To minimise the impact on wildlife	Presence of	Any direct or	Shapfiles/ officer		

Identification of Potential Sites to Host Strategic Waste Management Facilities

	interests	protected species	indirect impacts	knowledge		
		Location of wildlife corridor	Any direct or indirect impacts	Shapefiles		
Sieve 2 Total						

Sieve 3: Site Visit Checklist

Site Details	
Site Reference:	(Reference provided by the Employment Land Review)
Site Name:	
Ownership:	Council / Private / Mixed
Date of Survey:	22.02.2010
Current Site Status and Location:	
Description of Site and Suitable Use:	
Strategic Access Site Access:	
Floor Space in Use/ Vacant :	
Constraints or Infrastructure Requirements	
Topography:	
Trees/ TPOS/ Knotweed:	
Wildlife:	
Invasive Plants:	
Third Party Rights:	
Pylons/ Gas pipes/ OH Lines/ Telcom Mast/ Radio Masts:	
Pollution:	
Surrounding Area:	
Adjacent Land Use/ Conflicts:	
Potential Noise/ vibration / order Impacts:	
Market Appraisal	
Economic Viability of Existing, Proposed and Alternative use:	
Level of potential demand- as per ELR findings:	
General/ operational Comments:	
Development Management's Comments:	
Property Service's Comments:	
Conclusion	
Site considered suitable to host a waste	Yes / No

Identification of Potential Sites to Host Strategic Waste Management Facilities

management site	
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Appendix B: Site Visit Comments

Ref	Address	Site area (ha)	Constraints or Infrastructure requirements	Surrounding areas	Market Appraisal	Operational Comments	Development Management's Comments	Property Services' Comments
1297	Neptune Yard, Fisher Street, Walker Riverside North	5.89	Possibility due to proximity to residential	Industrial and residential in proximity	Expected for industrial or commercial use only. Long term lease to Shepherds Offshore (Neptune Yard: Energy Yard)	Only the eastern portion of the site is beyond 250m from residential	Good access from Fisher Street. Site protected under saved Policy ED 3.1 Walker Riverside. Neighboring authority would be required to be consulted on any planning application	Council owned, but entirety let on 2 leases. The smaller portion is on a new lease for 125 years and the larger for 150 years from 2008. The site is being developed into a renewable energy park. The site would either need to be surrendered or leased from the leaseholder.
1374	Forth Goods Yard (east side)	2.77	Limited site access	Resident and hotel uses in close proximity	Mixed use opportunities considering surrounding uses	Restricted height access or articulated waste carrying vehicles	Visible from Redheugh Bridge and Gateshead (impact on strategic views and Windmill Hills Town Park Gateshead)	Privately owned, would need to agree terms with owner.
1502	Scotswood Bridge Head, CellK East of Denton Road	1.22	Limited site access	Residential		Proximity of residential housing	Could not support an application for this site	Western part of site Council owned and forms part of the Scotswood Masterplan so may not be useable. Eastern part is privately owned and a business operates from this site so this would

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Site area (ha)	Constraints or Infrastructure requirements	Surrounding areas	Market Appraisal	Operational Comments	Development Management's Comments	Property Services' Comments
								need to be acquired.
2703	Sandy Lane, East of Brunswick Shoe Warehouse, Brunswick Industrial Estate	1.11	Access to site goes close to residential properties, Green belt set directly to north, south and west beyond existing industrial units	Industrial	Expected for industrial or commercial use only	No concerns	Possible conflicts with saved GB 1 and PPG 2 (developments affecting visual amenity of Green Belt)	Privately owned - was sold in 1973. Would need to reach agreement with the owner.
2794	Land west of Newburn Industrial Estate, Shelly Rd	1.14	Wildlife corridor runs through site to the north, site falls within Newburn Battle Field (C4.1)	Residential	Housing could be viable, extension to industrial park also possible	Proximity of nearest residential area	Discussion with County Archaeologist would be required at an early stage	Privately owned, would need to agree terms with owner.
2802	Newburn Riverside (Newburn Haugh)	51.33		Industrial, commercial and offices	Dependant on ONE 's aspirations for the area, waste facility may sterilise the remainder of the development	No concerns	Dependant on location of site it may be over looking new residential dwellings on Stella Park, Gateshead. Design of building would have to be sensitive to	Owned by One North East. Would need to agree terms with the owner.

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Site area (ha)	Constraints or Infrastructure requirements	Surrounding areas	Market Appraisal	Operational Comments	Development Management's Comments	Property Services' Comments
							existing units within business park	
2804	Newburn Haugh Allotments	1.89	Limited site access (through site 3359)	Industrial and commercial	Expected for industrial use only	Access to site and proximity of nearest residential	Possible conflict with Lemington Cone Grade 2 * Site set considerably lower than neighboring commercial use-possible conflict with scale of building in relation to the higher ground level	Privately owned. Perhaps worth noting that the Council has previously attempted to negotiate an acquisition but this has not been successful.
3052	Siemens South Side, Shields Rd North	6.8	Hadrian's Wall falls south of the site (Saved UDP Policy C4.1)	Close proximity to residential	Expected for industrial or commercial use only; development of a waste plant could compromise the Fossway Strategic Framework	Proximity of residential housing (only the north east corner of the site is beyond the 250m boundary)	Access good, from north via Shields Road, Hadrian's Wall falls to south of site, south east of the site is in close proximity to existing residential	Council owned. Forms part of the proposed Fossway Masterplan, intended to be designated for general commercial use. However there are currently no agreements in place on this site.

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Site area (ha)	Constraints or Infrastructure requirements	Surrounding areas	Market Appraisal	Operational Comments	Development Management's Comments	Property Services' Comments
3210	Siemens North Side, Shields Rd South	3.13	Sub station on site	Opposite Chillingham Industrial Estate, site in close proximity to residential to north (Heaton)	Newcastle College have indicated an interest in this site. Development of a waste plant could compromise the Fossway Strategic Framework	Possible conflict due to proximity of residential	Compatible use-possible conflict with residential area	Mixed ownership; Earmarked for disposal to Newcastle College, but this is not definite yet. A quarter of the site is to be let to Nexus for 3 years to facilitate line repairs.
3359	Lemington Glassworks (Former North East Motors), Lemington	1.06	Limited site access	Industrial and commercial	Expected for industrial use only	Proximity of nearest residential area (<90m)	Possible conflict with Lemington Cone Grade 2 *. Site set considerably lower than neighbouring commercial use-possible conflict with scale of building in relation to the higher ground level	Privately owned, would need to agree terms with owner.
3360	Lemington Caravan Park, Riversdale Way	1.88	Wildlife corridor runs through site to east	Industrial	Expected for industrial use only	No concerns	Compatible uses surround, screened from residential by existing uses and topography	Council owned. Developer is about to be given 1 years exclusivity to put together a development for the site. At the moment they do not believe anything is viable, however if they can acquire an adjacent site (Newburn Haugh Allotments) a development could stack

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Site area (ha)	Constraints or Infrastructure requirements	Surrounding areas	Market Appraisal	Operational Comments	Development Management's Comments	Property Services' Comments
								up.
4137	A&P Yard (A & Shipyard) Oil Road, , Walker Riverside	13.74	Proximity residential, site within boundary of North Tyneside	Residential	Expected for industrial or commercial use only	Only location sufficiently distant from any housing, north east corner of site. Consultation with neighbouring authority would be need to be carried out	Site falls within Walker Riverside Industrial Area and protected under saved UDP Policy ED3.1, access to site from north, however proximity to housing causes concern	Mixed ownership; Upper half of the site is outside of the City Council boundary (North Tyneside). Lower half is let on a 99-year lease from 1985. We would therefore either need to agree terms for a surrender of some or all of the site, or come to an agreement to lease part of the site back from the leaseholder.
4709	Newcastle Heliport, Skinnerburn Road	2.31	Limited site access, Skinnerburn Road has poor layout with sever congestion along length making access difficult and potentially dangerous	Industrial	Owner of site keen for residential development	Restricted height access or articulated waste carrying vehicles	Highly visible from Gateshead, potentially harmful views from Old Redheugh Bridge,	Privately owned, would need to agree terms with owner.

Identification of Potential Sites to Host Strategic Waste Management Facilities

Ref	Address	Site area (ha)	Constraints or Infrastructure requirements	Surrounding areas	Market Appraisal	Operational Comments	Development Management's Comments	Property Services' Comments
n/a	Byker Transfer Station, off Walker Road		Residential in proximity- long history of conflict. Site has additional capacity with boundary to accommodate a building of a certain size, however further consideration would be required once capacity known	Industrial and residential	Expected for industrial use only	Ideal site due to existing operation,	Compatible use. Use of this site for proposal would prevent addition trip generated across the city.	Council owned, SITA currently operate from this site under license, until 2024.
n/a	Benwell Transfer Station, Scotswood Road	1.2	River Tyne Wildlife Corridor runs east and west of the site	Industrial	Expected for industrial use only	No concerns	Existing city depot, PP granted 20.05.2005 for erection of waste transfer station and civic amenity of this site	Council owned, no agreements in place on the transfer site, but tenancies are in place around the boundary which might need looking into depending on proposals.



Property Market Assessment Land at Newcastle International Airport

Prepared on behalf of
Newcastle City Council
June 2013

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APPENDIX A – Site Plan

1 Introduction

1.1 PROJECT BACKGROUND

DTZ has been appointed by Newcastle City Council (*the Council*) to assess the potential market demand for employment land at Newcastle International Airport (*NIA*).

This allocation is being driven by potential de-allocation of employment land at Newcastle Great Park and Newburn Riverside and the requirement to maintain an adequate supply of employment sites over the Plan period to 2030. At present, the emerging land portfolio totals approximately 97 hectares (239 acres) of which around 50 hectares (124 acres) is allocated for general employment uses and 47 hectares (116 acres) is allocated for office use.

This emerging portfolio allocates additional land for employment uses at NIA to replace deallocations of unsustainable allocations at Newburn Riverside and Newcastle Great Park. The Council have appointed DTZ to provide a high-level assessment of the potential market demand and viability of the land at NIA to ensure it can make a sustainable contribution to the emerging land portfolio and assist in delivering the Council's long term economic growth strategy. To do this, DTZ has undertaken review of the office and industrial markets across Newcastle and the existing supply and demand drivers for 'out of town' accommodation.

Our report is structured to firstly provide a broad overview of the available land at NIA, identifying its characteristics and potential opportunities and constraints in respect to the delivery of employment space. Our report then provides an overview of the office and industrial property markets within Newcastle upon Tyne, before moving on to review existing research and analysis on the demand for employment space, completed on behalf of the Council. This research has been considered alongside the Council's emerging employment land portfolio.


Following a review of previous research and current market conditions, our report moves on to consider potential future demand drivers for employment land at NIA. This section includes an assessment of the growth potential of the Airport and considers their proposed strategy for achieving a substantial increase in passenger numbers, as well as their own masterplan, which identifies the potential for significant office and industrial development.

Our report will then conclude by reviewing the issues and options relevant to the development of new employment space at Newcastle Airport and the potential investment that may be needed to make development in this location both attractive to the market.

1.2 ADDITIONAL LAND

Newcastle City Council has provided us with a plan showing the areas of land to be allocated for employment uses. This plan is enclosed as Appendix A.

An initial overview of this land is set out below:

<p>Land South of Newcastle International Airport</p>	
<p>Location</p>	<p>The subject land is situated on the southern edge of Newcastle International Airport, approximately 11km (7 miles) north west of Newcastle City Centre and 5km (3 miles) from a junction with the A1 (Western Bypass). The land is bordered by the existing Newcastle Industrial Estate to the west, the airport to the north and agricultural land to the north, east and south east. Much of the land to the east forms the wider Great Park development.</p>
<p>Description</p>	<p>The land comprises a combination of worked agricultural land subdivided into various fields and interspersed with areas of mature woodland.</p>
<p>Site Area</p>	<p>50 hectares (124 acres).</p>
<p>Strategic Road Access</p>	<p>The A696 provides direct access to the A1, situated approximately 5km (3 miles) to the south east of the airport site. The subject site does not currently have access to the A696, but it could be provided through the retained Airport Industrial Estate. Alternatively, access could be provided through the Great Park development or via Brunton Lane, which in turn connects to Kingston Park Road and onto the A1. Each of these access options would require substantial investment to facilitate the required road linkages.</p>
<p>Local Road Access</p>	<p>The B1698 provides access to the existing Airport Industrial Estate which in turn can provide access to this additional land. This road provides a link towards Newcastle and Brunton Lane and also runs along the eastern side of the site and provides another link to Newcastle as well as north to Dinnington and</p>

	onwards towards Ponteland.
Proximity to Urban Area	The subject land is situated approximately 5km (3 miles) from the main urban area of Newcastle; however proposals within the SHLAA for the substantial expansion of Great Park, as well as other new build residential development on the western fringes of Newcastle, will bring the urban area much closer. This will therefore bring a greater population and labour supply within the immediate surrounding area of Newcastle Airport. It is likely that these developments will also help bolster public transport in this area.

2 Property Market Context

2.1 NEWCASTLE OFFICE MARKET

The UK office market has remained subdued over recent years as a continued knock-on effect from underlying economic uncertainty. While overall take-up in the regional office market increased to 86,399 sq m (930,000 sq ft), it remains below the 10 year quarterly average of 92,903 sq m (1,000,000 sq ft).

The current environment of economic constraint coupled with the number of large requirements satisfied in 2010 and to a lesser extent 2011, means that overall regional take-up for 2012 has been subdued. Activity remains focussed on the smaller end of the market with a large proportion of deals being for accommodation under 464.50 sq m (5,000 sq ft).

Take-up remains driven by lease events such as break clauses and lease expiry, consolidation, corporate cost saving and opportunism. In most cases, tenants are only moving if they have to, or if they have the opportunity to downsize or reduce their costs. There are now an increased number of opportunistic mid-sized professional firms interested in the value and flexibility of the highly specified Grade B space available.

Despite the increasing proportion of Grade B transactions, there is still an abundant overhang of Grade B space available and a shortage of supply of Grade A space due to the lack of new developments, with finance and appetite for new speculative office developments having fallen away considerably since 2008. Without a pre-let in place it is unlikely that new development will be brought forward over the short and medium term.

Regional availability was essentially unchanged in Q3, given the high proportion of churn lettings and the small amount of net absorption overall.

Overall regional availability is forecast to fall from 2012 over the medium term. However, the fall in total availability is expected to be gradual due to the relatively low proportion of new entrants or expansions expected in the near term. As the amount of available stock begins to fall headline rents will begin to increase on quality space in the best locations, with landlord incentives also reducing.

Looking specifically at the Newcastle office market, annual take up for 2012 reached 14,300 sq m (154,000 sq ft), a slight decrease from 2011, however availability over the period continued to fall in the following quarter's lettings and no refurbishment completions for new development coming forward within the latter part of 2012 for the city centre development pipeline remains extremely limited with the only development that has been specifically confirmed as going ahead being Phase 1 of Silverlink's Stephenson Quarter scheme. Groundworks have started on site with practical completion expected in 2014, incorporating around 3,716 sq m (40,000 sq ft) of new office space.

Prime headline rents for city centre space remain unchanged at £215 per sq m (£20 per sq ft) with a forecast of a small rise in 2013 due to a lack of available prime stock. Prime incentives remain at two months per year at terms certain and there is a general consensus among market agents is that

market incentives have now peaked and are forecast to harden over the short term, again due to a lack of prime space.

Out of town the office market remains dominated by the former Enterprise Zone developments of Quorum and Cobalt with limited new development in out of town offices within Newcastle and no significant schemes in the pipeline to come forward over the short term. Headline rents for out of town space, where available, remain in the order of £160 per sq m (£15 per sq ft).

Overall therefore this picture indicates that developer demand for an out of town location such as Newcastle International Airport is likely to be low over the short to medium term while occupier demand remains subdued and the market remains dominated by Quorum and Cobalt.

2.2 NEWCASTLE INDUSTRIAL MARKET

The North East industrial market has experienced significant changes from its traditional reliance on heavy industry of the past to today where there is now a strong presence of domestic, international and global companies who have chosen to locate in Tyne and Wear, County Durham, Northumberland and Teesside.

Nissan can be seen as one of the more successful companies with their plant in Washington, Tyne & Wear now recognised as one of Europe's most productive plants and the UK's largest car producer and influencing demand for industrial accommodation across the region.

They continue to be a topic of discussion in the region, having secured the production runs for the Leaf and new Qashqai lines, with a projected growth in production from 2013. Whilst this is yet to transfer into take up, there are registered requirements from Nissan and their suppliers totalling 46,450 sq m (500,000 sq ft).

It has also been announced more recently that they have been awarded the contract to build a new model currently known as the Invitation. It is anticipated that this could create additional demand for 74,320 sq m (800,000 sq ft) from Nissan and Tier 1 suppliers across the region.

Other positives in the region include the approval of Hitachi's £4.5 billion state contract to build express train carriages. It is envisaged this will create 1,000 jobs and bring a £660 million boost to the North East economy over the next 20 years and will again have knock effects to markets across the region.

Q3 take-up within the North East was 47,194 sq m (508,000 sq ft). This is over three times the Q3 2011 level but represents a fall from Q2 2012 when take-up was 92,902 sq m (1,000,000 sq ft); the highest level since 2009 and over three times the long term average.

Despite being restricted by a lack of available stock, one Grade A letting was completed in Q3; CMP Products, part of British Engines, bought 7,339 sq m (79,000 sq ft) of warehouse space at Nelson Park, Cramlington. Another key transaction was the letting of 22,947 sq m (247,000 sq ft) of space at Drum Industrial Estate to Simpsons Brothers Transport.

The North East now boasts the second lowest amount of available Grade A space in the UK at 46,451 sq m (500,000 sq ft). This should be somewhat eased over the coming months by the return to the market of 24,154 sq m (260,000 sq ft) at Foxcover 7 and 8 due to Cumbrian Seafood's going into administration.

In terms of other market activity, the region has also seen recent resurgence within the oil industry with renewed confidence generating growth. There is a large subsea sector supplying equipment used to recover oil and gas from the seabed. Recent forecasts have highlighted an expected average growth rate of 29% over the next two years.

The North East subsea sector serves a global market, with presence across Europe, Africa, North and South America, the Middle East and the Far East.

The renewable and offshore energy sector has also played its part in encouraging growth, with the North East positioning itself as a focal point for associated business and occupiers supporting the industry.

The industrial market has therefore shown a more improved market picture than the office sector with a number of key companies and industrials driving large requirements that in turn have implications for demand through supply chains. Consideration must be given then the remainder of this document over whether this would impact on demand for any development at Newcastle Airport.

3 Employment Land Portfolio

Within this section of our report we have summarised the emerging employment land portfolio and two key pieces of research that have informed the portfolio and analysis of potential take up of land over the plan period.

3.1 NEWCASTLE PROPERTY DEMAND ASSESSMENT (DTZ, 2010)

DTZ was commissioned by Newcastle City Council to provide an updated property market overview and demand assessment looking at potential requirements across both office and industrial sectors against the backdrop of recession and the aftermath of the credit crunch.

The report was published in February 2010 and key conclusions in respect to Newcastle's office market were as follows:-

- Headline rents would drop from £235 to £215 per sq m (£22 to £20 per sq ft)
- There is a widening gap between prime and secondary rents
- Prime city centre yields were tightening to 6.75%
- Availability of Grade A offices in the city centre stood at around 46,664 sq m (502,300 sq ft)
- 26,151 sq m (281,500 sq ft) of Grade A floor space was under construction
- 5.3 years supply of Grade A office space was currently available or being speculatively built

It is clear that much of the available space is slowly being absorbed on a market with little further new build accommodation having been brought forward.

The 2010 study found the following in respect to the Newcastle upon Tyne industrial market:-

- In 2009, there was approximately 43,430 sq m (467,500 sq ft) of industrial take up, down from 90,252 sq m (971,500 sq ft) the previous year and below the five year average of 637,500 sq ft
- Of the five year average take up figure, some 30% was pre-let and 70% was built speculatively
- In 2009 completions in the study area totalled some 28,335 sq m (305,000 sq ft), some 17% below the five year average of 34,280 sq m (369,000 sq ft)
- The availability of industrial equated to some 6.6% of stock

- The study identified five key industrial hubs within Newcastle, made up of Airport Industrial Estate, Brough Park Trading Estate, Newburn Riverside, Benfield Business Park and Brunswick Industrial Estate
- There was estimated to be 3,900 sq m (42,000 sq ft) of space under construction in the Newcastle area and a further 445,920 sq m (4,800,000 sq ft) of industrial space with planning permission
- Newburn Riverside was identified as a key opportunity for increasing industrial supply

3.2 OFFICE NEEDS ASSESSMENT (STOREYS EDWARD SYMMONS/NLP, 2012)

Storeys Edward Symmons, in partnership with Nathaniel Lichfield & Partners, have prepared an assessment of Newcastle and Gateshead's office needs as supporting evidence to the preparation of an area wide Employment Land Review. The report assessed the economic and property market indicators for future office demand and forecast potential take up levels using historic take up data. The report also provides a quantitative and qualitative assessment of premises across the settlement.

In providing a qualitative appraisal of office sites across Newcastle and Gateshead, the report identified Baltic Business Quarter, Newcastle Great Park and the south side of Newcastle International Airport as key out of town office locations. In assessing these three sites they drew the following conclusions:-

- Newcastle Great Park is a mixed use development, the northern part of which was originally pitched as a premium business park where the consortium that owns the land is now proposing housing development across the remaining development land
- Newcastle Great Park was identified as perhaps the only location which could accommodate a major requirement for a solus site such as Sage's HQ and while infrequent, the NPPF sets out a strong case for reserving a site for such requirements in close proximity to the region's primary office centre. Such requirements typically range from 8 to 12 hectares (20 to 30 acres)
- In respect to Baltic Business Quarter (BBQ), the report found that while there is potential to become a high quality office park in an edge of centre location, it currently lacks critical mass of office premises and struggles to compete with existing out of town business park locations such as Cobalt and Quorum. It is unlikely BBQ will see significant further development until completion of these schemes and therefore not likely to come forward in the short term
- In respect to Newcastle International Airport, it was identified that land was proposed for an office park as well as the development of hangers, warehouses and industrial units alongside the runway and aprons, however this was restricted due to requirements for infrastructure provision, including the creation of new access from the A6918 Ponteland Road

In assessing these out of town locations, the report concludes that it is difficult to envisage Baltic Business Quarter attracting requirements for solus sites and major requirements for high specification offices and recommends Great Park as potential for further development once available floor space at Quorum and Cobalt have been depleted and that in the absence of Great Park, major office park requirements could be lost to Newcastle and Gateshead.

The report then goes on to state that in selecting sites for allocation as office parks, the Council should aim to meet occupiers requirements by showing a choice of in centre and out of centre locations and make provision for a solus site of 8 to 12 hectares (20 to 30 acres) to accommodate an HQ office development.

3.3 EMERGING PORTFOLIO

Newcastle City Council has provided us with a spreadsheet indentifying sites included in the emerging portfolio of employment land.

We understand that there is an anticipated requirement for employment land of between 80 and 120 hectares (198 to 296 acres) over the Plan period and the emerging portfolio comprises 33 sites providing approximately 97 hectares (239 acres) of which 50 hectares (124 acres) is allocated for general employment uses and 47 hectares (116 acres) is allocated for office use.

Furthermore, 18 hectares (44 acres) of land in the portfolio is available for development in the short term, 44 hectares (110 acres) for medium term development and 34 hectares (85 acres) for longer term delivery.

This emerging portfolio is summarised below. Please note, overall figures may show marginal variance from the above due to rounding.

Looking at the emerging portfolio of office sites this includes the following:

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Site Area (ha)	ELR Conclusion
1400	Stephenson Quarter	City Centre	4.13	Mixed use	1.00	The site is part of the Accelerated Development Zone (ADZ) and will come forward with an element of Grade A office space.
1328	Strawberry Place	City Centre	0.63	Office	0.63	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term.
1039	Lower Steenbergs	Ouseburn	0.31	Office	0.10	High demand anticipated as part of the wider regeneration of the Ouseburn. Likely to come forward for mixed use offices / residential

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Site Area (ha)	ELR Conclusion
1076	Plot 12 Quayside	City Centre	0.57	Office	0.29	Anticipated that the site will be taken up when the market return, given its location in the urban core and the local success of similar schemes.
4358	Southside, Newcastle Airport	North	0.55	Office	0.55	The site is likely to come forward as part of the Airport's expansion plans.
5146	NGP western expansion Area	North	12	Office	12.00	The site is likely to come forward as part of the Airport's expansion plans.
1713	Southside, Newcastle Airport	North	40.88	Office	32.00	The site is likely to come forward as part of the Airport's expansion plans (subject to market conditions improving) 32.0 (5.55ha for offices and 10.0ha for solus site, balance of 16.45 for industrial

The above table shows the limited number of pure office sites situated outside of the City Centre and the focus of those that are available being around the south side of NIA. In total around 47 hectares (116 acres) of land is allocated for office use, however Site 1713 will most likely comprise a mix of office, industrial and storage space or uses ancillary to the airport. Excluding this site, the emerging portfolio shows little significant other out of town office proposals.

The emerging portfolio allocates the following sites for mixed use:

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Site Area (ha)	ELR Conclusion
3025	General Hospital Site	Inner West	7.58	Mixed use	3.20	Planning permission approved for the Centre for Ageing Campus (B1b)
1412	Main Former Brewery Site	City Centre	7.83	Mixed use	2.25	This strategic site will come forward for mixed use with an element of employment use.
3077	Heber Street and Brewery Offices	City Centre	0.78	Mixed use	0.39	Site will benefit from the proximity to Science Central and may not come forward for employment.
1331	St James Metro Station	City Centre	0.9	Mixed use	0.45	Evidence suggests that demand for A1 office space will outstrip supply when the market returns. It is anticipated that the site will come forward in the short to medium term.

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Site Area (ha)	ELR Conclusion
4329 & 4330	NCC Coach Park & WH Smith Depot	City Centre	0.78	Mixed use	0.39	The 4th Yard Study indicates that the wider area of Fourth Yard is capable of accommodating up to 186,000 sq m (2,000,000 sq ft) of office space to become the 'Spinningfield' for Newcastle. This site has the potential to come forward with an element of office space.
3064	Maling Street	Ouseburn	0.3	Mixed use	0.15	2,032 sq m of B1 floor space proposed as part of Phase 1 of the 'Ouseburn and East Quayside Development Framework'
1374	Forth Goods Yard	City Centre	2.77	Mixed use	1.35	The 4th Yard Study identifies the site as being capable of accommodating up to 186,000 sq m (2,000,000 sq ft) of office space to become the 'Spinningfield' for Newcastle. Despite this the delivery of the site for employment uses in long term and uncertain.
1384	Safestore (former Heron's Garage)	City Centre	0.68	Mixed use	0.34	Long term and uncertain site. May not come forward for employment uses. Constrained by viability and land assembly in the short term.
1398	South of Pottery Lane	City Centre	3.15	Mixed use	1.50	Could come forward for employment led, mixed use development in the longer term.
4709	Newcastle City Heliport	Inner West	2.31	Mixed use	0.77	Site is unsuitable for housing, and the likelihood of the site being developed for employment uses is limited by proximity to the gas holder.

As would be expected, the above information shows a City Centre focus for mixed use development with the majority of the sites forming small infill development within the urban core. In total around 11 hectares (27 acres) are allocated for mixed use development.

Finally, the portfolio allocates the following sites for general employment uses:

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Area (ha)	Conclusion
4219	Whitehouse Enterprise Centre	West	3.1	General	3.10	The site is subject to ground remediation surveys. Anticipate that the site will come forward in the short term.

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Area (ha)	Conclusion
1313	East Pilgrim Street	City Centre	17	Retail-led mixed use	3.00	Retail-led regeneration scheme to include a significant element of B1 floorspace.
5294	Walker Riverside North (Neptune Energy Park Phase 3)	East	5.59	General	5.59	Site requires remediation and archaeological investigation works first. The site is on two levels - the upper level will come forward first for an extreme engineering building associated with offshore technologies (use class B1 research and development). The lower level will be a light weight industrial building (use class B1/B2/B8)
2758	Cutty Coats, Throckley Industrial Estate	West	1.12	General	1.12	Site is part of Throckley Industrial Estate which continues to trade well despite the down turn in market conditions.
2794	Shelley Road, Newburn Industrial Estate	West	1.01	General	1.01	Developer interest in eastern section of site. Likely to come forward when market conditions improve.
2703	Sandy Lane, Brunswick Industrial Estate	North	1.12	General	1.12	The site performs well against market attractiveness indicators but poorly against sustainability indicators. This infill site is likely to come forward when market conditions improve.
4438	Dobson's Yard, Wincomble Road	East	0.85	General	0.85	Needs significant ground works / investment. Unlikely to come forward until the Neptune Energy Park has been developed.
ED3.1 (32) 3210	Siemens, Shields Road North	East	3.23	General	3.23	Suitable for employment use.
ED3.1 (32) 3052	Siemens, Shields Road South	East	6.41	General	6.41	Suitable for employment use.
4576	C A Parsons Works, Shields Road	East	2.05	General	2.05	Suitable for employment use.

Ref	Site Name	Location	Gross Site Area (ha)	Use	Net Area (ha)	Conclusion
5253	Shepherds Offshore land on former Neptune Yard off Fisher Street	East	1.67	B1/B2/B8	1.67	Suitable for employment use.
5234	Land at former Neptune Yard	East	2.1	B1/B2/B8	2.10	Suitable for employment use.
4721	Wellstream Naval Yard, Wincombe Road	East	1.77	B1/B2/B8	1.77	Suitable for employment use.
4476	Land at junction of Abingdon Road and Fisher Street	East	0.97	B1/B2/B8	0.48	Suitable for employment use.
4250	Rhodes Street, Walker	East	1.15	General	1.15	Suitable for employment use.
4359	South of freight village	North	5.03	Airport	5.03	The site is likely to come forward as part of the Airport's expansion plans (subject to market conditions improving). Airport related restriction to be lifted.

The general employment land totals approximately 37 hectares (91 acres) and as can be seen within the above table there are few sites providing a substantial amount of general employment land in a single location. This could prohibit restrict the ability for the Council to attract large footloose inward investment to the city and adds weight to the need to conserve the remaining large land allocations, such as those allocated at NIA.

4 Future Market Demand

4.1 GROWTH OF NEWCASTLE INTERNATIONAL AIRPORT

We have been informed by Newcastle International Airport Limited that the proposed developments on the south side of the Airport are not directly linked to growth of the Airport, however it is clear that the success of any development will reflect success of this key gateway to the region and we should consider the important role it plays in the local economy.

Newcastle International Airport Limited's recent submission to the Adonis review stated that they are the largest airport in the North East of England, supporting 7,800 jobs and contributing almost £402million to the regional economy every year. At present, the airport accommodates 4.4million passengers with capacity to increase this to 8million passengers per annum as required. The most significant recent enhancement of services was the introduction in 2007 of direct daily flights to Dubai with Emirates. This service has had a significant impact on the level of business activity for the region, assisting in increasing trade between the North East and Australasia from under £150million in 2007, to just under £275million in the last 12 months.

At the current time, York Aviation estimates that the economic impact of Newcastle Airport is as follows:-

- Supporting 7,800 jobs including 3,200 on site and a further 500 off site through direct effects and a further 4,100 across the North East through indirect induced affects
- A total of £402.5million in gross value added generated annually
- The airport supports £57million per year via tourism and an additional 1,750 tourism jobs
- The journey time benefits generated as a result of services provided by the airport will bring net economic benefits to the region of £243.3million in 2012
- The value of exports shipped by the airport is £173.6million per annum of which £150million is carried on the Emirates service
- Air passenger duty paid by passengers flying from Newcastle in 2012 is expected to be £48.8million compared to a total turnover of Newcastle International Airport Limited of £52million

This analysis clearly demonstrates the current economic impact of the airport on Newcastle and the wider North East region. A masterplan has now been prepared by Newcastle International Airport Limited to further grow the airport and enhance this economic impact and is due to be published later in 2013.

4.2 OUT OF TOWN OFFICE MARKET

Outside of Newcastle City Centre, the office market within the wider Tyneside conurbation remains dominated by the former Enterprise Zones at Quorum and Cobalt in North Tyneside. These parks have been able to attract the majority of the large scale office occupiers over the last ten years, thanks to their former Enterprise Zone status and the significant incentive packages that have been available to ingoing tenants.

Quorum extends to around 83,610 sq m (900,000 sq ft) and is now fully built out with around 39,947 sq m (430,000 sq ft) remaining vacant. Headline quoting rents are now set in the order of £182.45 per sq m (£16.95 per sq ft) but substantial rental incentives bring the true rental values closer to £64 per sq m to £75 per sq m (£6 per sq ft to £7 per sq ft). Occupiers in the Park include HMRC, Tesco, OSG and Convergys.

Cobalt will comprise around 232,250 sq m (2,500,000 sq ft) when fully completed, of which around 37,160 sq m (400,000 sq ft) is currently completed and available to let and a further 60,385 sq m (650,000 sq ft) remaining to build. The Park delivers a similar headline rental level to Quorum, but again rental incentive packages reduce the true rental levels significantly. Occupiers at Cobalt include North Tyneside Council, Santander, Orange and Newcastle Building Society. At Cobalt they are also considering uses other than offices and in particular have pursued opportunities to construct data centres within the Park with the first currently available to let and a second in the pipeline.

The rental packages available within these Parks mean that they show significant financial advantage over true city centre accommodation where headline rental levels for Grade A accommodation are in the order of £215 per sq m (£20 per sq ft). Other out of town locations, offering headline rentals at a reduced £129 per sq m to £161 per sq m (£12 per sq ft to £15 per sq ft), cannot compete in terms of incentive packages and have therefore been unable to attract similar quantum of occupiers.

This inability to compete has meant that previous out of town proposals, including those at the Great Park and Newburn have suffered, encouraging the pursuit of alternative uses. Similarly, schemes such as Baltic Business Quarter at Gateshead remain substantially undeveloped. It is expected that the dominance of these two former Enterprise Zones will continue over the short term due to the continued high levels of availability and heavy incentives, however it is expected that over time this dominance will dwindle. In particular, as buildings become older, and the availability and corresponding rental incentives reduce, we expect to see a rebalancing of the market towards alternative locations.

It should be noted that neither Cobalt nor Quorum are located in areas that would have previously been considered prime office locations. These Parks developed due to their Enterprise Zone status, rather than being delivered as a result of market demand for these specific locations, and as a result, infrastructure for both areas has been built to fit around their development and to bring occupiers and the labour market to each site.

Development at NIA is therefore considered to provide an opportunity to benefit when the market rebalances and will have a clear competitive advantage against alternative locations thanks to the significant infrastructure is already provided to the site due to its proximity to Newcastle International Airport.

Over the medium to long term, we therefore consider that there will be an opportunity for other out of town office locations to come forward and prove successful, particularly where they can offer closer proximity to the commercial hub of Newcastle City Centre and the key infrastructure routes of the A1, Newcastle Airport and Newcastle Central Station. The land at the south side of Newcastle International Airport, as well as land already available at Baltic Business Quarter, would therefore be obvious examples from which to benefit over this longer term period.

4.3 POTENTIAL OFFICE OCCUPIERS

Demand at both Quorum and Cobalt has been delivered from a wide variety of business sectors without dominance from one particular area. It should be expected that this varied business profile will continue for any further out of town office locations that are brought forward.

One area which is expected to continue to generate consistent enquiries however is the banking and finance sector. In particular we have seen demand from the public sector through HMRC and new and existing private sector organisations such as Virgin Money, Tesco Bank, Newcastle Building Society and Santander. Further division and restriction within this industry are likely to lead to new banks emerging which may generate further property demand, as would the establishment of regional investment banks as mooted in emerging government policy. It should be noted that the North East, including Newcastle upon Tyne, continues to remain competitive on a national basis for low skilled, back office, business administration and call centre opportunities and continued demand is expected across these areas.

Demand may well be generated specifically as a result of Newcastle Airport. Indeed, it is understood that when Sage went through their relocation to the Great Park, one of the key determining factors of choosing this site was its proximity to Newcastle Airport and it is expected that similar considerations would be undertaken by general business users. Recently, we have seen large office requirements come forward from airlines such as Jet2, which have been unable to be satisfied in the North East and has instead been satisfied in the Yorkshire area.

4.4 INDUSTRIAL MARKET

We have seen a stronger performance from the industrial sector in the North East over the last 12 – 18 months and indeed availability of accommodation has reduced dramatically over the period with a significant shortage of large, high quality warehouse and production facilities across the region. In addition there are few immediately available sites suitable for large scale development and capable of attractive significant inward investors.

Major drivers across this sector have included distribution, advanced manufacturing, the automotive sector, offshore engineering and green energy and these, often large manufacturing processes, are expected to continue to drive growth for the region over the medium to long term. The nature of these sectors means occupational demand has been greatest in close proximity to the Port of Tyne, major road and rail connectors and proximity to sector hubs and clustering of existing occupiers (for example on the northern bank of the River Tyne or Nissan) or close to the customer base (for example Newcastle City Centre).

Having spoken with local agents, the Airport does not currently rate as an obvious opportunity to meet much of this current demand with the road network suitable for serving the airport, but not ideal for providing a base for distribution north via the A1 to Scotland or south, given the hindrances provided by congestion on the A1 (Western By Pass). Furthermore, the distance from key sector hubs such as the Nissan Plant and Port of Tyne will be seen as a barrier by many occupiers.

Opportunities do remain for industrial development in the area, but more likely related to airport uses such as freight, the servicing of aircraft and associated vehicles and then supplemented by light manufacturing and storage uses, or those uses focused on new businesses and small and medium sized enterprises.

4.5 DEVELOPMENT VIABILITY

Key to delivery of any new office or industrial accommodation will be development viability. At the current time we continue to see limitations in the availability of development finance and this, along with uncertainties in occupier demand, has prevented large scale speculative development. This situation is likely to continue over the short to medium term.

5 Issues & Options

5.1 RECOMMENDATIONS

Having considered the emerging portfolio of land, we conclude there is potential for additional commercial development on land at the south side of NIA. This allocation can be justified on the following grounds:

- The allocation of employment land in this location will counter the deallocations being pursued in other out of town locations such as Newcastle Great Park and Newburn Riverside.
- Further allocations will ensure a balanced portfolio of town centre and out of town office sites, particularly given the limited out of town locations within the emerging portfolio.
- This site should prove a viable development proposition over the medium to long term and benefit from a gradual decreasing of importance of Quorum and Cobalt to the local out of town office market over this period.
- The development of further commercial accommodation in this location will help support the growth of Newcastle International Airport, one of the region's key economic drivers.

When considering individual areas at the south side of NIA, we consider they lend themselves to the following developments:-

- **Site 4359: South of Freight Village** - We consider this to be suitable for small office development built to provide accommodation for primarily small and medium sized business. Typically this would be and constructed in pavilion style office buildings giving individual office occupiers their own front door accommodation and ranging in size from 139 sq m to 465 sq m (1,500 sq ft to 5,000 sq ft). A similar style scheme that has been successfully achieved at The Watermark, Gateshead. Such development could come forward over the short to medium term.
- **Site 1713: Southside** - We consider this land is likely to be suitable for a mixed commercial development to include air freight, warehousing and storage facilities, offices and light industrial accommodation. We expect this land to come forward over the medium term.
- **Site 5146: NGP Extension** - This land should be allocated and retained for a office development to come forward over the medium to long term and providing high quality accommodation and buildings ranging from 1,858 sq m to 9,290 sq m (20,000 sq ft to 100,000 sq ft).

In taking this site forward, we consider there to be the following items to be considered:-

5.2 ACCESS

To deliver additional office accommodation on the land it is expected that a significant road and access improvements directly from the A1 may need to be provided. We would recommend that a link is provided to the east, through the Great Park development and linking up to the main access road that has been constructed from the A1 to serve the employment space, including Sage. This will provide a strong link with Sage and direct to a major junction off the A1. We have been informed by the Council that an access road such as this is likely to cost between £5million and £10million with the working assumption of £7.5million.

In addition, along the eastern edge of the site, road improvements should also be carried out to Brunton Lane to increase capacity with Kingston Park Road, which should again provide a secondary access to the A1.

Finally, as well as a link through the site to the existing Airport Industrial Estate an improved junction at Callerton Park onto the A696 should also be provided, giving strong access points both east and west.

5.3 TRAVEL PLAN

When considering any development of an out of town business park, it is important to consider how employees will reach the site and a detailed travel plan should be prepared which provides for improved public transport linkages to the land.

The site has the advantage that the existing Metro Line Station at Callerton Park is within close proximity and a travel plan should be prepared giving details of how the staff can best utilise this metro service, perhaps through an estate bus or similar. In addition, consideration within the travel plan should be given as to how existing bus routes could be extended into the land and new routes provided so that the Business Park can be connected with the main residential areas, and in particular the City Centre and Newcastle's northern and western suburbs.

5.4 BUILT ENVIRONMENT

It is important that in any out of town business park, an appropriate and carefully considered work environment is created that provides an attractive place for people to come and work and allows businesses to present themselves within the context of a modern environment.

A single architect should therefore be appointed to masterplan each of the various development areas within the land at the south side of Newcastle International Airport to provide a coherent theme to the wider development and ensure any proposals are integrated with the wider growth plans for the airport. This area wide masterplan can then be ratified through a Local Development Order to simplify the planning process and ease the process for bringing forward development.

In regards to the additional office land, this masterplan could make use of the semi rural and parkland feel of the area to provide high quality and low density office development.

5.5 ENTERPRISE ZONE

As part of the Government's growth agenda, the Chancellor of the Exchequer announced 11 new Enterprise Zones (EZs) in the 2011 budget and this has now grown to 24 new EZs spread across the country. While these new EZs do not benefit from the same package of benefits previous designations provided, there remain significant opportunities including business rates discounts, retention of growth rates, simplified planning and enhanced capital allowances.

While it is unclear if further EZs will be designated the Council, alongside Newcastle International Airport Limited, should investigate the possibility of including any additional land in such a policy as a means of facilitating development.