

Employment Land Assessment

In Relation to the Former Monckton Coke
and Chemical Works, Royston, Barnsley

Prepared on behalf of Hargreaves (UK) Services Ltd

Date of Report 14 June 2017

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Appendix 1 - Masterplan

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14/0617

Ref: 317535

Dear Sirs

Employment Land Assessment – In Relation to the Former Monckton Coke and Chemical Works, Royston, Barnsley.

1 Introduction

Instructions

- 1.1 We have been instructed by Hargreaves (UK) Services Ltd to prepare an Employment Land Assessment in connection with planning applications for the development of its former operational site; Monckton Coke Works at Royston.
- 1.2 It relates to two planning applications for the site. One will be for a mixed employment and residential scheme. A separate application has already been submitted for a Gas Peaking Plant.

Scope

- 1.3 This Employment Land Assessment examines the commercial property market within the boundaries of Barnsley Metropolitan Borough Council ('the Council'). Specifically:-
 - An overview of Barnsley and the historic provision of employment accommodation;
 - A review of current market demand for employment land and buildings;
 - Identification of the future potential supply of employment land;
 - A review of the subject site and its future suitability for employment use.

Sources of Information

- 1.4 The size of Barnsley is such that its commercial property market is of insufficient size to warrant collation of detailed statistical information by commercial organisations. The availability of such information is therefore limited to that published by The Council and its regeneration arm, Enterprising Barnsley. This report therefore draws on the published information available from these organisations supplemented with the market knowledge of personnel in the Sheffield Office of Knight Frank through activity in the Barnsley commercial property market.
- 1.5 In preparing our report we have had regard to the following documents all of which have been published on the Council's website.
1. *Barnsley Employment Land Review (April 2010)*
 2. *Market Assessment of LDF Employment Sites (March 2013) - Benell Investments & Peter Brett Associates.*
 3. *Review of Employment Policy Areas (June 2013) - Benell Investments*
 4. *Commercial Property Review of Barnsley (November 2013) - Chris Rowlands*
 5. *Industrial/Logistics Market Review (June 2014) – Commercial Property Partners*
 6. *Barnsley Local Plan Evidence (April 2016) – Mott MacDonald*
 7. *Barnsley Employment Land Review (2016) – Barnsley MBC*
 8. *Emerging Local Plan including Local Plan Maps submitted to the Secretary of State for Examination (December 2016) – Barnsley MBC*
- 1.6 In addition Enterprising Barnsley have kindly provided the following:-
9. Supply Demand and Take-Up figures (April 2016 to March 2017) – Enterprising Barnsley

2 Background Information

Barnsley - Location

- 2.1 Barnsley is a Metropolitan Borough, situated centrally within South Yorkshire, approximately 175 miles north of London, 25 miles south of Leeds, 15 miles north of Sheffield and 35 miles east of Manchester. It's urban extent is located east of the M1 Motorway with access provided by Junctions 36 – 37. It covers circa 127 square miles.
- 2.2 The town has a rail service that links to London St Pancras via Sheffield with an average journey time there from of approximately 2 hours 10 minutes.
- 2.3 In terms of air travel, Robin Hood (Doncaster/Sheffield Airport) is approximately 35 miles distant to the east, while elsewhere in the region there are four other international airports within circa an hours drive at Nottingham East Midlands, Leeds Bradford, Manchester and Humberside.
- 2.4 Furthermore, the deep water East Coast Ports of Hull, Grimsby, Immingham and Goole are within a one hour's drive by road, via the M62, A1(M), M180 and A180.

Barnsley – Population & Economy

- 2.5 Historically, the economy of the town was centred on the coal industry. Over 3 decades the coal mining industry ceased to exist and over the 10 years from 1984 16,000 jobs were lost with the final coal mine, Goldthorpe closing in 1994.
- 2.6 Major employers currently in Barnsley include ASOS, Rexam Glass, Symphony Kitchens, Premdor and Premier Foods (Mr Kipling and Lyons cakes).
- 2.7 The information and statistics in the following paragraphs have been extracted from the '*Employment Land Review*' published by Barnsley MBC in 2016.
- 2.8 As at the 2011 Census the town had a population of 231,221 which was a 6% increase from the 2001 Census figure of 218,000. The population is being projected to grow by 27,000 (11.5%) between 2012 and 2033 (ONS projections).
- 2.9 The majority of the Borough's population is concentrated in the main urban area of Barnsley and the former mining settlements of Cudworth, Hoyland, Royston and Wombwell; all of which are located to the east of the M1. In addition there is Penistone which is located in the more rural area to the west of the M1.
- 2.10 There are 87,000 total jobs in Barnsley. However, 36% of Barnsley residents commute outside the Borough for employment, whilst 23% of jobs are filled by inward commuters. By national and regional statistics there is an under representation of high skilled professionals and an over supply of low skilled occupations.
- 2.11 Levels of education are below national and regional averages and the number of economically inactive residents is above the averages.
- 2.12 Since the demise of the coal mining industry there has been a shift from manufacturing to service based industries. Jobs in the Manufacturing, Construction, Motor Trade and Transportation and Storage sectors are slightly above regional and national averages, whilst jobs in Professional,

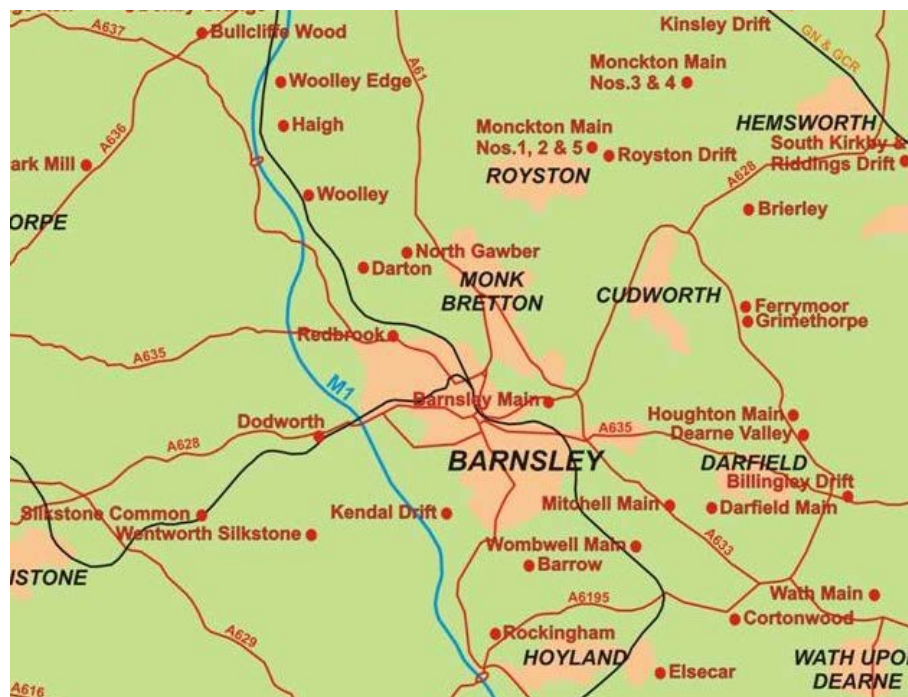
Scientific and Technical Activities are below.

- 2.13 The '*Employment Land Review*' states that the borough has a reliance on manufacturing and construction sectors and that "*these are risk adverse and low growth value sectors. If the Barnsley economy is to rebalance and achieve the levels of job growth required then significant economic intervention must take place*".
- 2.14 The English Indices of Deprivation (2015) ranks Barnsley as the 39th most deprived authority (out of 326) in the Country.

3 Barnsley Employment Areas

Historic Development of Employment Accommodation

- 3.1 Barnsley was traditionally heavily dependent on the coal mining industry. Mines were spread throughout the Borough with the main concentration to the east of the M1. Map 1 below illustrates the mines and their locations. Support services then established in the town, many clustering around the mines. As the mines closed from the 1980's onwards, the buildings around the pit heads were in certain cases converted into industrial estates.
- 3.2 In addition there were a number of substantial industrial estates that developed in the 1960's and 70's such as Wentworth Business Park at Tankersley, Carlton Industrial Estate and Goldthorpe Industrial Estate as examples.



Map 1: Barnsley Coal Mines – Northern Mines Research Society

Recent Development of Employment Accommodation

- 3.3 The demise of the coal mining industry led to many regeneration initiatives during the 1990's through to the Credit Crunch in 2007/8. The initiatives included significant grant funding from both the UK and European Union. In particular the establishment of Enterprise Zones and Objective 1 status led to a substantial amount of new development, particularly of an industrial and distribution nature.
- 3.4 The Dearne Valley area in particular had become economically deprived as a result of the closure of the mining industry. In 1995 six areas were designated with Enterprise Zone status, three of which were in Barnsley; these being Highgate (Fields End) Business Park, Goldthorpe Industrial Estate,

Wombwell Bypass (Waterside and Valley Business Parks). It was realised that the sites were too remote in respect of transport links and therefore the A6195 (Dearne Valley Parkway and Park Springs Road) was constructed linking the area to J36 of the M1. This provided the infrastructure necessary to open up the sites for development and make them attractive to occupiers.

- 3.5 As well as the Enterprise Zone sites the A6195 also opened up the Grimethorpe area and also sites close to the M1 such as Shortwood and Ashroyd Business Parks. These sites continued to develop up until the Credit Crunch in 2007/8. Capitol Park at J38 of the M1 developed post Millennium, although this is more of a mixed use location including offices, hotel and family pub. The Barugh Green also continued to see development.
- 3.6 It is beyond the scope of this report to map every industrial area in Barnsley however we will make reference to and draw from the *'Commercial Property Review of Barnsley'* prepared by Chris Rowlands and Co for Barnsley MBC in 2013 as part of the Local Plan process. Mr Rowlands estimated that there were at the time 72 employment (B1, B2 and B8) locations within the Borough. Of these, 54 were industrial in nature, 5 were office and 13 were mixed use. Mr Rowlands lists the major industrial areas as:-

- Redbrook/Barugh Green
- Barnsley Central M1 Corridor (J36)
- Barnsley Central M1 Corridor (J37)
- Barnsley M1 Corridor (J38)
- Dearne
- Athersley/Carlton
- Cudworth/Shafton
- Park Springs
- Wombwell/Darfield
- Stairfoot/Ardsley
- Monk Bretton
- Penistone Rural

These sites are generally remote in location from the subject site with no linkages between.

Current Development of Employment Accommodation

- 3.7 The recession post 2008 had until the last 12 months or so resulted in virtually no new development and certainly none on a speculative basis taking place in the Borough of an employment (B1, B2 or B8) nature. Even prior to the recession such development was largely only viable with public sector funding and with the loss of the majority of such funding the negative viability gap has not enabled the private sector to develop.
- 3.8 Over the past 12 months we are now evidencing some development on the sites around J36 and it is our understanding that Barnsley MBC is seeking to focus what little is available in the way of public

funding, The Sheffield City Region LEP through its Investment Fund (SCRIF) has allocated £15.7 million for improvements to the road infrastructure around J36 of the M1 as part of promoting the Dearne Valley Growth Corridor

- 3.9 We also expect to see some activity at Capitol Park at J36 of the M1 where we understand that planning permission has recently been granted for a 7,000 sq m industrial/distribution unit.
- 3.10 We therefore expect to see future development focused on land around J36 and J37 of the M1.

4 Demand for Employment Accommodation

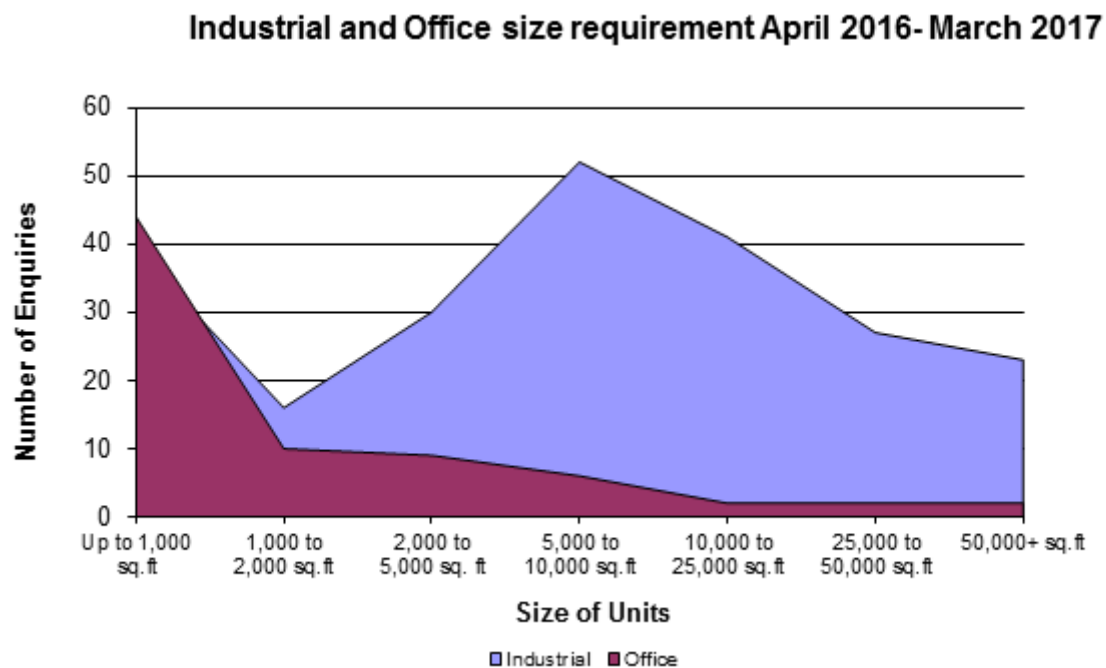
Occupier Enquiry Levels – Enterprising Barnsley

4.1 Occupier enquiry levels in Barnsley are monitored by Enterprising Barnsley on an annual basis. The organisation has kindly provided the following statistical information to us for the past 12 months (April 2016 to March 2017). The following bullet points are comments made by Enterprising Barnsley:

- Land and Property enquiry levels have recorded a 10 year high (34% increase in the year) and Inward Investment is at an all-time high (82% increase compared to last year).
- 45% of all enquiries are from potential Inward Investors.
- The increase in demand has been driven by the continued growth and retention of indigenous businesses and the attraction of inwardly investing SME businesses to the borough.
- Greatest demand has continued to be for industrial accommodation (62% of all enquiries received) and particularly for units sized between 5,000 -10,000 sq ft, indicating a change in demand from last year (10,000 – 25,000 sq ft).

Office accommodation demand has continued (as has been the trend for the past 10 years) to be for units of up to 1,000 sq ft in size and this market remains less strong in comparison.

4.2 The graph immediately below illustrates the enquiry levels, whilst the table following sets these out in tabular form. These have been produced by Enterprising Barnsley.



Graph 1:

4.3

Table 1:

Property	Industrial		Office	
Up to 1,000 sq ft	39	17%	44	59%
1,000 to 2,000 sq ft	16	7%	10	13%
2,000 to 5,000 sq ft	30	13%	9	12%
5,000 to 10,000 sq ft	52	23%	6	8%
10,000 to 25,000 sq ft	41	18%	2	3%
25,000 to 50,000 sq ft	27	12%	2	3%
50,000+ sq ft	23	10%	2	3%
Total	228	61%	75	20%

Source:

4.4 There are a number of points that we would extract from the above as follows:-

4.5 **Industrial**

- There is a good range of enquiries spread across the size ranges.
- There is no indication as to the quality of the space required or affordability i.e. how much is demand for new build.
- Many of the enquires may be regional and not Barnsley specific. This is likely to be more relevant at the larger end of the scale.

4.6 **Offices**

- The vast majority of the demand is for sub 1,000 sq ft units.
- There is very little demand above 5,000 sq ft.
- The larger requirements are likely to be regional rather than Barnsley specific.
- A good proportion of the enquiries will be for town centre as opposed to out of town.

Occupier Enquiry Levels – Knight Frank

4.7 We have compared the above with enquiries registered on our own internal database. We would acknowledge that we do not expect to pick up all enquiries for Barnsley, particularly at the smaller end of the scale where potential occupiers are likely to limit their enquiries to agents based in Barnsley.

4.8 **Industrial**

Our own database over the relevant period has 274 enquiries registered where Barnsley is listed as a potential location. However of these the Barnsley specific enquiries number 43.

4.9 Looking at the Barnsley specific requirements, approximately 40% of the enquiries were specific to property at motorway junctions with the vast majority being specific enquiries around modern/new developments currently being marketed at J36 of M1, or were from occupiers currently located at a motorway junction. Of the remaining, the majority are not location specific within the town.

4.10 Of the Barnsley specific requirements demand was across the full size spectrum, with some requirements clearly requiring modern premises and others looking towards the older existing stock. Only 5 enquires were registered where the focus of the requirement in terms of size was over 50,000 sq ft.

4.11 Offices

Our own database over the same time period has registered few enquiries over the last 12 months which are not of sufficient number to draw conclusions, other than to state that all are below 5,000 sq ft.

4.12 Looking back over 18 months there are three enquiries for office space over 30,000 sq ft. One of these was Yorkshire wide, another was South Yorkshire wide and the final one was through Enterprising Barnsley which was to retain an existing occupier in the town.

4.13 We would conclude that demand for offices in Barnsley lacks any strength. It predominately comprises of small scale enquiries from indigenous businesses.

Take up of Employment Accommodation

4.14 Enterprising Barnsley monitor the take up of commercial property in the Borough. They have provided the following table giving a breakdown of take-up as captured by the organisation over the period April 2016 to March 2017.

4.15

Table 2:

Property	Industrial		Office	
	Units	Sq Ft	Units	Sq Ft
Up to 1,000 sq.ft	17	8,976	54	18,276
1,000 to 2,000 sq.ft	9	11,178	8	10,560
2,000 to 5,000 sq. ft	15	46,777	8	23,856
5,000 to 10,000 sq.ft	11	68,596	4	28,213
10,000 to 25,000 sq.ft	4	69,908	1	13,000
25,000 to 50,000 sq.ft	5	154,712	2	82,087
50,000+ sq.ft	2	350,895		
Total	63	711,042	77	175,992

Source:

4.16 Industrial

The table shows a relatively healthy level of take-up for units of sub 10,000 sq ft and very limited take-up over that size. The availability of stock may be to some extent a limiting issue as Enterprising Barnsley have highlighted to us that there records show only 8 units over 25,000 sq ft available and zero units above 100,000 sq ft. A detailed analysis of enquiries which is beyond the scope of this report would be required in order to add more detailed comment on this. Whilst the take-up of the larger units does look low when compared to the number of registered enquiries, we would not expect every enquiry to progress and therefore it is unlikely that a stock issue has been a significant problem

at the larger end of the scale.

4.17 **Offices**

The take-up figures broadly reflect recorded levels of demand and confirm that Barnsley's market for office accommodation is focused in terms of volume to sub 1,000 sq ft requirements and whilst there is some activity at higher levels, it is limited.

4.18 Based on our knowledge of operating within the Barnsley commercial property market, we consider that the take-up statistics provided are reflective of the market.

Employment Land Enquiries

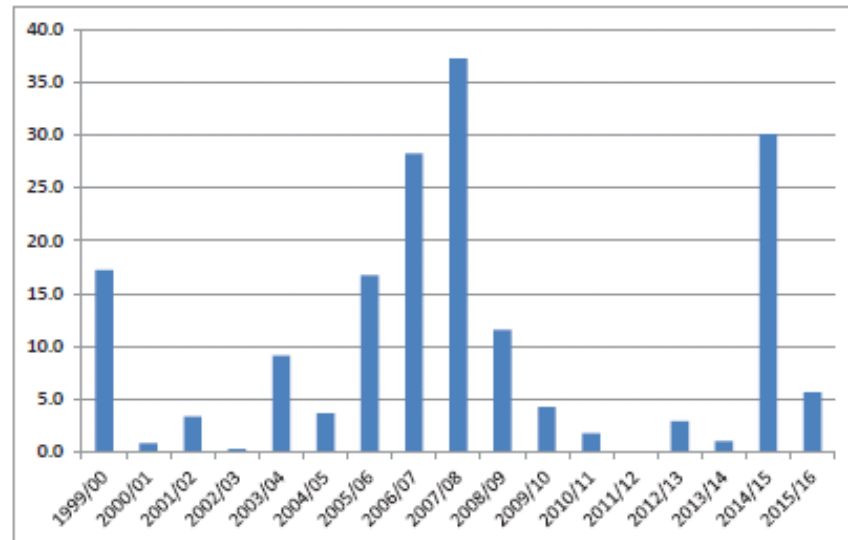
4.19 We have interrogated our own database of enquiries. There are a small number (less than 30) of site only enquiries registered where Barnsley is listed as a potential location, but none of them have been registered as Barnsley specific. The majority are for the wider South Yorkshire region, some extend further afield. A number of them are for various forms of open storage or transport depots that traditionally would be located in secondary industrial locations. There are some enquiries registered requiring sites to develop for distribution purposes but these are small in number.

Employment Land Take Up

4.20 Barnsley's '*Employment Land Review*' (2016) states that approximately 420Ha of land were allocated in the existing UDP in 2000 as either '*Employment Proposal*' or '*Area of Investigation for Employment Use*'. It further states that over the past 17 years 173.9 ha had been developed for B class uses. An average take up of 10.23 ha per annum.

4.21 However, to consider average take-up would probably be misleading as the economic climate has varied significantly over this time period. The following table extracted from the '*Employment Land Review*' illustrates the variation in take up over the years.

Figure 5: Land developed in Hectares over last 17 years for employment uses



Graph 2:

4.22 Until 2008 the Borough had had the benefit of substantial government and EU funding including; Gap Funding, Objective One, Single Regeneration Budget, European Coal and Steel Fund and Enterprise Zone status. Enterprise Zone (EZ) status ran from 1995 to 2005. The 1999/00 column in the table may well reflect the peak of the EZ land take-up; the growth between 2004 and 2007/8 in take up reflects the influence of Objective One funding and a buoyant economy.

5 Potential Future Employment Land Supply

Current Local Plan Stage

5.1 Barnsley’s new Local Plan was submitted to the Secretary of State for Examination in December 2016 and is expected to be adopted during late 2017. The plan period runs from 2014 to 2033.

Employment Land Requirement

5.2 Within the proposed Local Plan Publication Draft 2016 there are 25 sites totalling 309 ha of land that have been allocated for employment purposes. In addition there is a reserve site at Goldthorpe of 98 ha should demand prove necessary.

5.3 It is understood that the Council’s reason for the reserve site is that *‘the allocation of the reserve site adjacent to the proposed Goldthorpe allocation will be of benefit to Barnsley and the City Regions as it will mean that should a footloose large scale use come forward, that cannot be accommodated on a site elsewhere in Barnsley or the wider City Regions, this reserved land could be released. Barnsley is a prime location to accommodate such uses given its motorway location’.*

5.4 Within the *‘Employment Land Review’* a land requirement of 291.2 ha is identified made up as follows:-

Table 3:

Use class	Land requirement
B1a Office	40.8 Ha
B1b/c, B2 Industry	125.8 Ha
B8 Other	120.8 Ha
B8 Shed	3.5 Ha

Source:

The proposed employment sites within the Local Plan Publication Draft 2016 exceed the calculated requirement due to the configuration of the identified sites totalling slightly more than the calculation produced in the Employment Land Review.

5.5 The employment land requirement has been calculated in the Employment Land Review on the basis of the following:-

Table 4:

Jobs and Business Plan figure (17,558 jobs impact)	
Floorspace required (Sq m)	515,957
Land Requirement (Ha)	51.6
Land Requirement (Ha) based on 40% site coverage	129.0
Replacement allowance (5ha per annum)	95
Total Employment land requirement (Ha)	224
Margin of choice 30%	67.2
Total Overall Employment land requirement (Ha)	291.2

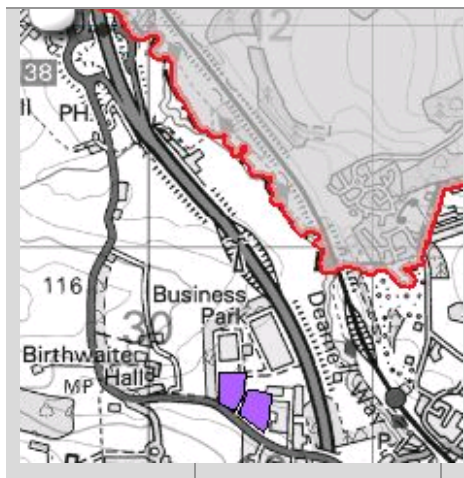
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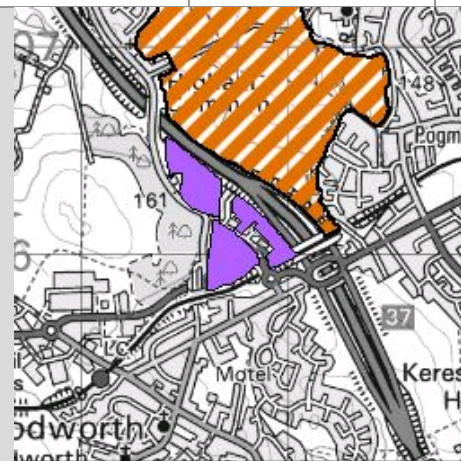
Proposed Site Allocations Within the Local Plan Publication Draft


5.6 The following sets out the list of sites that are allocated in the Local Plan Publication Draft 2016 for employment purposes. This has been extracted from ‘*Employment Land Review*’ (Barnsley MBC December 2016). The comments set out in the grey shaded areas are our own thoughts on the respective sites. Please note that we have not carried out an assessment of the suitability of the site for development as this was an in depth process carried out as part of the emerging Local Plan process which we will refer to later in this report.

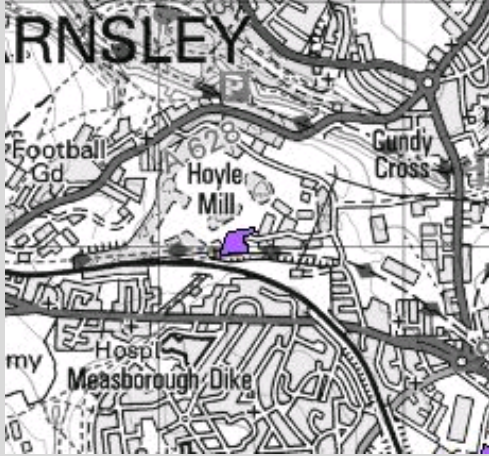
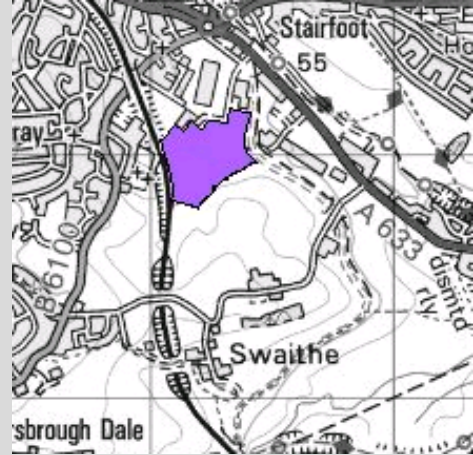
Table 5:

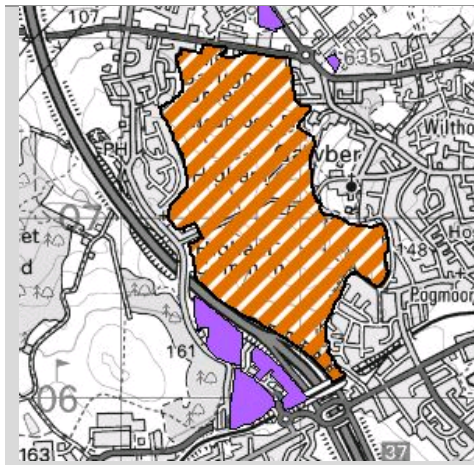
Site Assessment Ref:	Site Assessment Name:	UDP Site Ref and name if applicable	Site Description	Site Area (Ha)
Urban Barnsley				
UB1	Birthwaite Business Park	DT3/1	The site is located north of the A637 (Huddersfield Road), Darton. The site is comprised of undeveloped Greenfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and is occupied by Premdor. Bringing this site into employment use would contribute to the continued success of the business park.	3.5

		<p>An established industrial estate to the north of Barnsley. Fronting directly onto an A road with easy access to J38 of the M1 and also to the north of Barnsley.</p>		
<p>UB3</p>	<p>Claycliffe Business Park</p>	<p>BA4/1 Claycliffe Road / Barugh Green Road</p>	<p>The site is located north of the A635 (Barugh Green Road), Barugh. The site is comprised of undeveloped Greenfield land which form part of a larger area which was originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of business/ industrial users. Bringing this site into employment use would contribute to the continued success of the business park.</p>	<p>1.5</p>
<p>UB5</p>	<p>Zenith</p>	<p>BA4/2 Claycliffe Industrial Estate</p>	<p>The site is located off Whaley Road, Wilthorpe. The site is comprised of undeveloped Greenfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of businesses. Bringing this site into employment use would contribute to the continued success of the business park.</p>	<p>0.4</p>

			Claycliffe and Zenith park are in close proximity. A favoured car dealership location and well established as a mixed use employment area.	
UB7	Capitol Park Extension		The site is located north of Capitol Park, Dodworth and is comprised of Green Belt land which is currently in agricultural use. The development of this land offers the potential to expand the adjacent successful business park which has excellent access to the M1.	5.4
UB8	Capitol Park	DO3/1 Junction 37 Employment Site	The site is located north of the A628 (Dodworth Bypass), Dodworth. The site is comprised of undeveloped land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of businesses. Bringing this site into employment use would contribute to the continued success of the business park. Part of the site benefits from Enterprise Zone status.	9
			Capitol Park is situated on J37 of the M1 and forms part of the gateway on the main motorway junction giving access to Barnsley. It is already well established with mixed use development including offices, a hotel and a family pub. Further development land will give opportunity for distribution and manufacturing units. One of Barnsley's prime locations.	

UB12	Bromcliffe Business Park	BA40/2/1 Former Monk Bretton Training Centre	The site is located south of Burton Road, Monk Bretton and comprises undeveloped Brownfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of businesses. Bringing this site into employment use would contribute to the continued success of the business park.	0.7
			A minor infill site in a secondary location. Currently appears to be in use for the storage of caravans (Google Street View).	
UB13	Oaks Business Park	BA4/7 Barnsley, Main Ind. Estate	The site is located west of Oaks Lane, Hoyle Mill. The site is comprised of undeveloped Brownfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of users. Bringing this site into employment use would contribute to the continued success of the business park.	0.9

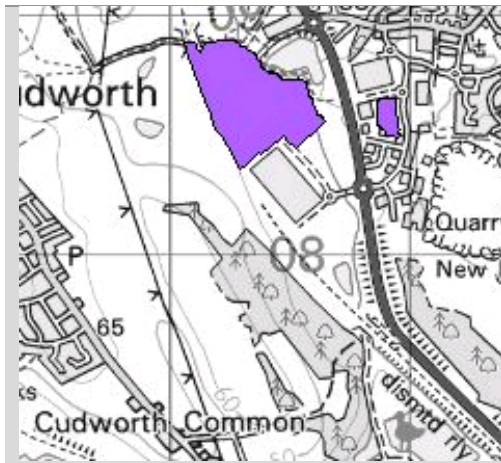
			<p>An infill site to the rear of an established business park which appears from an aerial photo to be in use for open storage.</p>	
UB16	Bleachcroft Way Industrial Estate	BA4/10	<p>The site is located to the south of Bleachcroft Way, Stairfoot. The site is comprised of undeveloped Greenfield land which was previously allocated for employment use in the UDP.</p>	9.3
			<p>A substantial development site located to the rear of a modern but redundant B & Q. A little remote from the motorway network, but the Stairfoot roundabout is an intersection of several A roads to the south of Barnsley town centre.</p>	
MU1	Land South of Barugh Green Road		<p>The site is located south of the A635 (Barugh Green Road), between Barugh and Gawber. The site is comprised of undeveloped Green Belt land which is currently in agricultural use. The site is regarded as key to the delivery of the Councils aspirations for the creation of large business parks in market attractive locations.</p>	43.2



Located in the Barugh Green area running south to abut the M1 at Dodworth. When opened up this will be a prime development site for mixed used including employment, residential and housing. It will presumably benefit from a link road through to Dodworth and J37 of the M1.

Cudworth

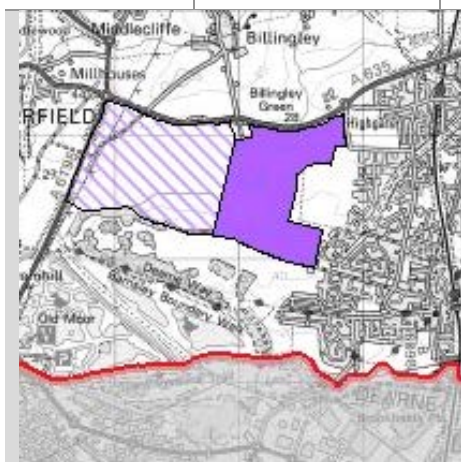
C2	Land off Ferrymoor Way	NE5 Former Grimethorpe Colliery	<p>The site is located off Ferrymoor Way, Park Springs, Grimethorpe. The site is comprised of undeveloped Brownfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of businesses. Two of which are known to have an interest in this land for expansion purposes. Bringing this site into employment use would contribute to the continued success of the business park.</p>	17
C3	Land West of Springvale Road	NE5 Former Grimthorpe Colliery	<p>The site is located west of Springvale, Park Springs, Grimethorpe. The site is comprised of undeveloped Greenfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established industrial estate and accommodates a range of users. Bringing this site into employment use would contribute to the continued success of the business park.</p>	1.2



The Grimethorpe area has seen considerable success with development and the attraction of businesses to the location although much of this was pre recession and with the availability of significant public funding. Whilst some distance from J 36 of the M1 the sites benefit from direct access onto the Dearne Valley Parkway. It is understood that part of the larger site is owned by Symphony Group for future expansion.

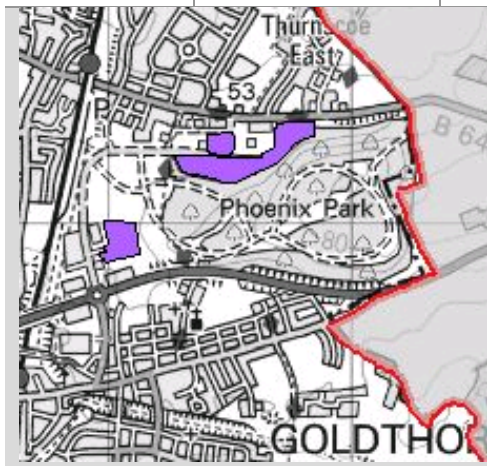
Goldthorpe

D1	Land South of Dearne Valley Parkway	DE3/4 West Goldthorpe Colliery	The site is located south of the A635 (Dearne Valley Parkway), Goldthorpe. The site is comprised of Green Belt land which is currently in agricultural use and undeveloped Greenfield land which was originally allocated for employment use in the UDP. The majority of the wider employment allocation is now an established industrial estate which accommodates a range of industrial users. The site is regarded as key to delivering the Councils aspirations for the creation of large business parks in market attractive locations and due to the relatively flat topography is capable of accommodating large floor plate buildings.	72.9
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A major development site, but in a secondary location. Some distance from motorway junctions but directly on to Dearne Valley Parkway. In recent years Aldi has developed a major distribution depot on the neighbouring site. Good road access to A1 to the east at Doncaster. The area has developed over many years and as demonstrated by some of the site being previously allocated in the UDP.

D2	Fields End Business Park	DE3/3	The site is located east of Barrowfield Road, Thurnscoe and is comprised of undeveloped land which forms part of a wider area originally allocated or employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of businesses. Bringing this site into employment use would contribute to the continued success of the business park.	2
D3	Thurnscoe Business Park	DE3/2	The site is located off Barrowfield Road, Thurnscoe. The site is comprised of undeveloped Greenfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established business park and accommodates a range of users. Bringing this site into employment use would contribute to the continued success of the business park.	6

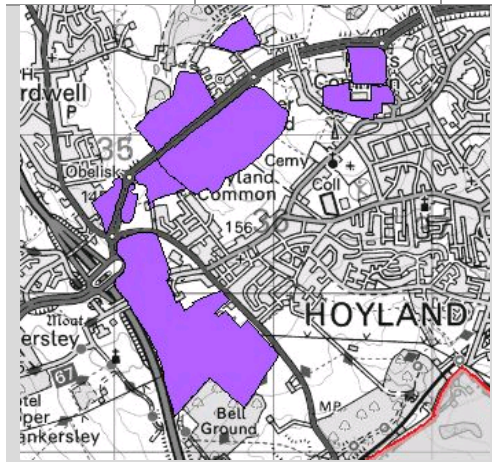


These are long established industrial sites which appear to have land remaining from the UDP allocation. Very much secondary locations in a deprived area. We note that a substantial new factory facility is being built on Thurnscoe business park which we understand is a relocation from nearby Wombwell.


Hoyland

HOY1	Land West of Sheffield Road		The site is located to the west of the A6135 (Sheffield Road), Hoyland. The site is comprised of Green Belt land which is currently in agricultural use. The site is regarded as part of a cluster of sites which are seen as key to delivering the Councils aspirations for the creation of large business parks in market attractive locations.	52.3
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HOY2	Rockingham	HN3/2 Rockingham Employment Site	The site is located off the Dearne Valley Parkway, between Birdwell and Hoyland. The site is comprised of undeveloped Greenfield land which was originally allocated for employment use in the UDP. The site is regarded as part of a cluster of sites which are seen as key to delivering the Councils aspirations for the creation of large business parks in market attractive locations.	8.9
HOY3	Shortwood Extension		The site is located north of the Dearne Valley Parkway, Hoyland. The site is comprised of Green Belt land which is currently in recreational use. The site is regarded as part of a cluster of sites which are seen as key to delivering the Councils aspirations for the creation of large business parks in market attractive locations.	11.8
HOY4	Shortwood Business Park	HN3/4 Shortwood	The site is located to the north of the Dearne Valley Parkway. The site is comprised of the remaining undeveloped plots of an existing business park, which was previously allocated for employment use in the UDP. Bringing this site into employment use would contribute to the continued success of the business park. Part of the site benefits from Enterprise Zone status. The site is regarded as part of a cluster of sites which are seen as key to delivering the Councils aspirations for the creation of large business parks in market attractive locations.	3.8
HOY5	Land South of Dearne Valley Parkway		The site is located south of the Dearne Valley Parkway, Hoyland. The site is comprised of Green Belt land which is currently in agricultural use. The site is regarded as part of a cluster of sites which are seen as key to delivering the Councils aspirations for the creation of large business parks in market attractive locations.	28.6
HOY7	Ashroyd	HN3/3 Platts Common Ind. Est	The site is located off the B60696 (Ryecroft Bank), Hoyland. The site is comprised of undeveloped land which was previously allocated for employment use in the UDP.	8.9

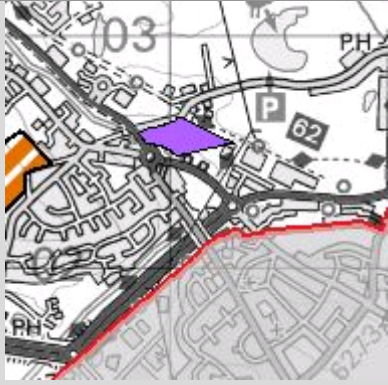
			<p>Part of the site benefits from Enterprise Zone status. The site is regarded as part of a cluster of sites which are seen as key to delivering the Council's aspirations for the creation of large business parks in market attractive locations.</p>	
		<p>The Hoyland sites are considered prime employment sites in Barnsley, particularly to the distribution sector. Shortwood has already been developed over the last 15 years and is occupied by a range of businesses. Ashroyd has also been partially developed.</p> <p>They had been allocated in the UDP however not all have been developed. There are understood to be infrastructure issues in respect of the J36 roundabout and also drainage issues.</p> <p>R</p> <p>The Council has targeted its limited funding resources into this area and the location is likely to be one of the main focus for development in Barnsley for the foreseeable future.</p>		

Penistone

<p>P2</p>	<p>Land North of Sheffield Road</p>		<p>The site is located to the north of the B6462 (Sheffield Road), Springvale, Penistone. The site is comprised of Green Belt land which is currently in agricultural use.</p>	<p>3.3</p>
		<p>Not a site which is particularly relevant to the subject site being located to the West of the M1.</p>		

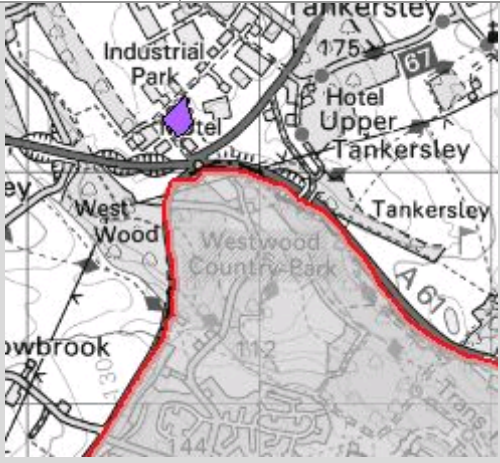
Wombwell

W2	Everill Gate Lane	WW4/3 Valley Business Park	The site is located to the north of the A633 (Valley Way) Wombwell. The site is comprised of undeveloped Greenfield land which forms part of a wider area originally allocated for employment use in the UDP. The wider employment allocation is now an established Business Park and accommodates a range of businesses.	3.6
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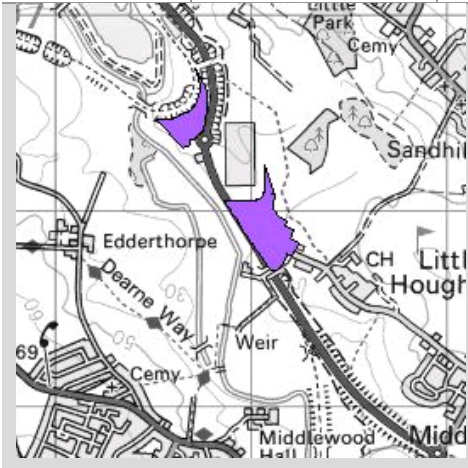
	<p>An infill site adjacent to an established industrial estate and reasonably well located on the Dearne valley Parkway.</p>
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Non Principal Town

N1	Wentworth Industrial Park, Tankersley	HN3/1 Wentworth Industrial Park, Tankersley	The site is located off Maple Road, Wentworth Industrial Park, Tankersley. The site is comprised of two plots of undeveloped land, within an established industrial park and were previously allocated for employment use in the UDP. Bringing this site into employment use would contribute to the continued success of the industrial park.	1.2
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	<p>A small infill site on a well established industrial estate to the west of the M1 and not relevant to the subject site.</p>
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N2	Land West of	DA4 Houghton	The site is located west of Park Spring	3.4
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	Park Spring Road, Houghton	Main Colliery	Road, Park Springs Houghton. The site is comprised of undeveloped land which was previously allocated for employment use in the UDP.	
N5	Land East of Park Spring Road, Houghton	DA4 Houghton Main Colliery	The site is located to the east of Park Spring Road, Park Springs Houghton. The site is comprised of undeveloped land which was previously allocated for employment use in the UDP. The site has the potential to accommodate the expansion of the neighbouring distribution warehouse.	8.3
			These sites are located adjacent to the ASOS distribution facility. Likely potential for expansion or to service the facility. There have been various proposals on the land to the West but have not proceeded. The building occupied by ASOS had been vacant for a number of years prior to it taking occupation.	
				307.1

Source:

The Process of Allocation of Sites for Employment in the Proposed Local Plan

5.7 As part of the Local Plan preparation process Barnsley MBC appears to have carried out an extensive assessment into the supply of and the projected future requirement for employment land in the Borough, cumulating in the publication of the *'Employment land Review' in December 2016*. The document is split into 3 parts:-

Part 1 – An assessment as to whether the Borough's current employment land stock is suitable for modern employment use.

Part 2 – Identification of the Borough's employment land requirements up until 2033

Part 3 – Identification of the sites which have the potential to make up the Borough's employment land portfolio up until 2033.

5.8 The report makes reference that in June 2013 the Borough's employment land stock was estimated at 420 ha. This comprised of land falling within the following UDP allocations:-

1. 'UDP Employment Proposal'
2. 'Area of Investigation for Employment Use'
3. 'Employment Policy Area (EPA)'

Whilst the above three form the employment land stock only 'UDP Employment Proposal' or 'Area of Investigation for Employment Use' that remains undeveloped is regarded as forming the Boroughs current employment land supply (not including 'Employment Policy Areas'). As of August 2016 this was estimated at 121.84 ha.

UDP Employment Policy Areas

5.9 'Employment Policy Area (EPA)' sites were reviewed as to their appropriateness or otherwise for continued employment use. They were assessed by Benell Investments whose findings were set out in its report 'Review of Employment Policy Areas' (June 2013). The sites were categorised in the report on the following bases:-

Tier 1 - Good current use and attractive for ongoing employment use.

Tier 2 - Good current use. Not attractive for new build.

Tier 3 - Poor current use and not attractive for new build premises.

5.10 Each site was assessed for market attractiveness and viability using criteria set out in the following table:-

Table 6:

Criteria \ Level	Good	Average	Poor
Market Attractiveness for current employment space	Provides sites and premises that occupiers require and is at high occupancy levels.	Indicates sites with some demand from occupiers although occupancy levels aren't high.	Little or no demand based on use and values. Poor use of the site.
Market Attractiveness for new build employment space	The site would be well received should redevelopment occur.	Potential demand for occupiers at this location but not considered prime.	Little demand for redevelopment of employment space.
Potential Viability of new build employment space	Financially would work in the current market.	May need an uplift in market or assistance to be financially viable.	Significant uplift in the market required to be viable.

Source:

5.11 The subject site was reviewed as part of this process. The findings as set out in the report were as follows:-

Table 7:

UDP Ref	Site Name	Hectarage
RO4/2	MONCKTON COKE AND CHEMICAL WORKS	17.9

This major facility is still in use and is fully occupied. There are varying forms of building on site and vast open areas.

CURRENT USE SUMMARY – EXISTING TRADING BUSINESS/ES

5.12 Table 8:

UDP Ref	Site Name	Hectarage
RO4/2	MONCKTON COKE AND CHEMICAL WORKS	18.4

The existing facility is fully utilised and given its bespoke nature, proves attractive to the current occupier. Should the facility become vacant, given the size and nature of the current site we would expect significant reclamation and contamination issues would need addressing. In general, the location is unestablished for employment space and therefore financial viability will mean higher value uses or public sector assistance would be required.

Split score –

CRITERIA	LEVEL
Market Attractiveness for current employment space	GOOD
Market Attractiveness for new build employment space	POOR
Potential Viability of new build employment space	POOR

Source:

5.13 On the basis of the above scoring the site was categorised in **Tier 2**. This category was explained in detail in the report as follows:-

*‘Tier 2 sites provide sites and premises which are proving to be attractive in their current use and have been graded **GOOD** within this category. However, when assessing these sites for their market attractiveness for new build premises, we have graded them as **POOR**. A number of sites are currently being used well and provide crucial activities for the area. However, the occupier may be there for historic reasons and should the site become available, the general market would not see these sites as employment locations. We would therefore recommend that if these sites became available, alternative uses may be worth considering as better alternative employment locations exist in the borough.’*

5.14 On the basis that the subject site is no longer classified for employment within the Local Plan, we can only assume that the recommendation made by Benell Investments as shaded grey above was acted upon.

Employment Land Portfolio in the Proposed Local Plan

5.15 The portfolio of sites (as set out in the table at 5.6 above) that have been proposed in the Local Plan includes both sites brought over from the UDP and new sites. As part of the selection process all sites that were put forward were assessed and scored against a range of criteria under the themes:-

- Meeting Employment Needs
- Accessibility
- Deliverability
- Location

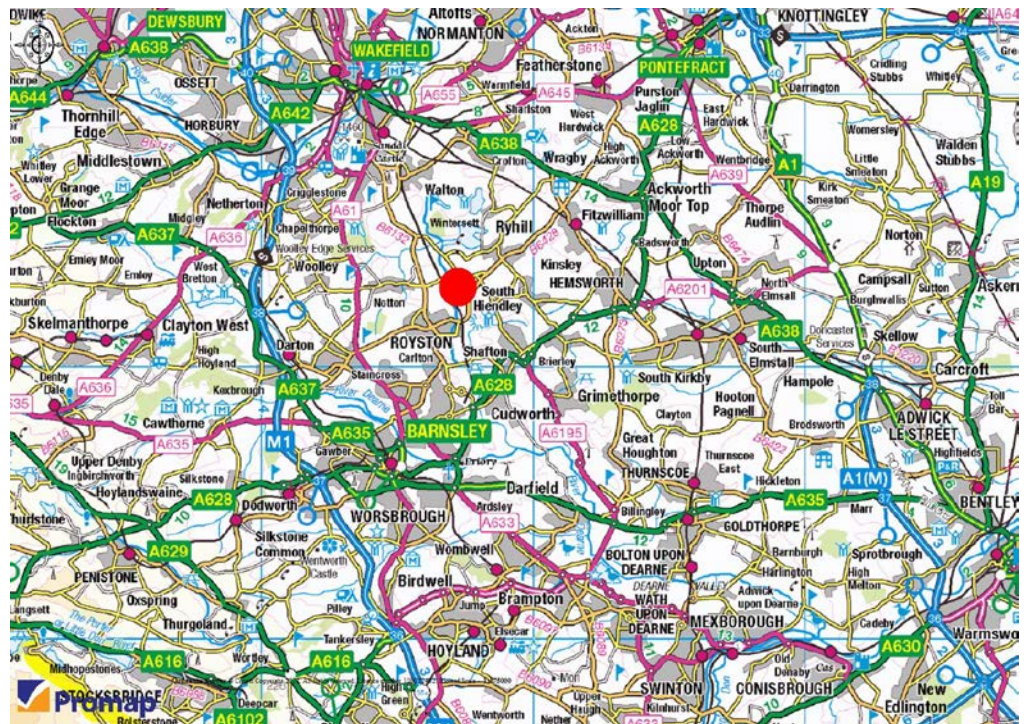
- Environment and Amenity

- 5.16 A viability assessment of the sites was carried out by Benell Investments & Peter Brett Associates which was reported in March 2013 in '*Market Assessment of LDF Employment Sites*'. It is our understanding that this formed the basis of the portfolio of sites included in the emerging Local Plan.
- 5.17 It is fair to say that most of the sites have some issues in terms of deliverability that need to be overcome and financial viability remains an issue throughout most of Barnsley, indeed if not the region. In the aforementioned report it is stated that the sites taken forward are considered to be either viable now, or could be during the plan period with further work. In our opinion there is therefore no need to assume that additional employment land over and above that allocated will be required during the life of the Local Plan.

6 The Subject Site

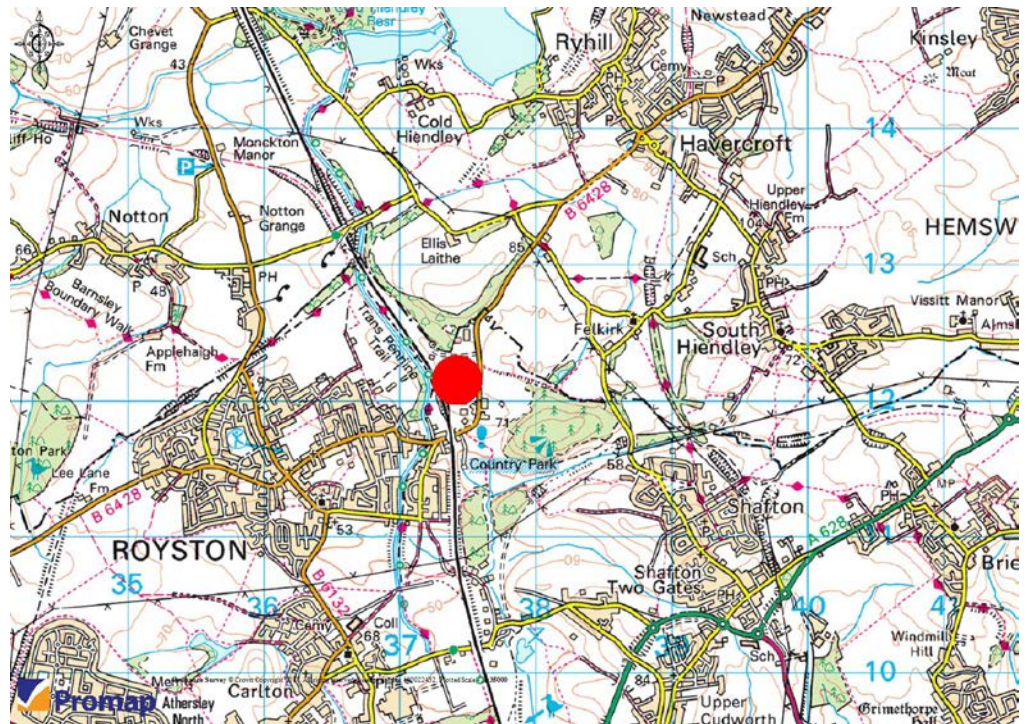
Location

- 6.1 The subject site is located on the outskirts of Royston, a town located approximately 5 miles to the north east of Barnsley town centre from which it has an approximate 20 minute drive time.
- 6.2 Royston is one of the main towns in the borough with a population of circa 10,700 (2011 Census). Its history is based around coal mining. It now forms a substantial, largely residential area to Barnsley.
- 6.3 The site sits in the middle of the A61, A638 and A628 triangle; however these are accessed via B or lesser grade roads. It is somewhat remote from the motorway network being an approximate 25 minute drive to J37 of the M1 and 15 minutes to J38. The above are as quoted by Google Maps and are for travel by car. HGV travel times will be extended.



Map 2: Location Map

- 6.4 The site is accessed from Lund Hill Lane (B6428) which links Royston (to the south west) to the villages of Ryhill & Havercroft (to the north east). Other unclassified roads lead to Shafton (to the south east) and South Hiendley (to the east).



Map 3: Royston & Surrounding Area Map

- 6.5 The site has historically been used for employment purposes. At the time it was established goods would have been transported by horse and cart and by rail, with wider road communications being of little relevance. Road transport is now a major consideration to businesses when choosing where to locate. . Vehicular access to the site from Royston is limited due to a low railway bridge at the bottom of Lund Hill Lane. There are traffic calming measures in Havercroft and a further low railway bridge to the north east at Fitzwilliam.
- 6.6 The majority of HGV traffic to the site has to therefore funnel via an unclassified road through the village of Shafton which then connects to the A628.

Description

- 6.7 The site comprises the former Monckton Coke and Chemical Works comprising of 16.81 hectares (41.5 acres) of brownfield land.
- 6.8 Production on the site was originally established in 1878 as part of Monckton Colliery since which time the site has been used for the manufacture of coke and chemical based products extracted from coal. Following falling demand for its products the site was decommissioned in 2016 with the residual final product stocks currently being shipped from site as market demand requires.



Aerial Photograph 1



Aerial Photograph 2



Aerial Photograph 3

Reclamation

- 6.9 Whilst modern practices will have minimised the potential for contamination on the site, the site was in continuous use for over 100 years and historical contamination is known to be present (and is recognised by Barnsley MBC in its evidence base – the *Review of Employment Policy Areas*).
- 6.10 An extensive programme of reclamation will be required to bring the site to a standard suitable for alternative development. We understand that the site is classified as a British Coal legacy site and as such the responsibility of the current land owner regarding contamination and reclamation only dates back to the date that its Pollution Prevention and Control Permit was granted in 2010. Failing a viable scheme for redevelopment being carried out then the site will potentially remain in its unattractive state as reclamation will not be viable. Such works are currently estimated at £3 to £4 million.

Redevelopment Proposal

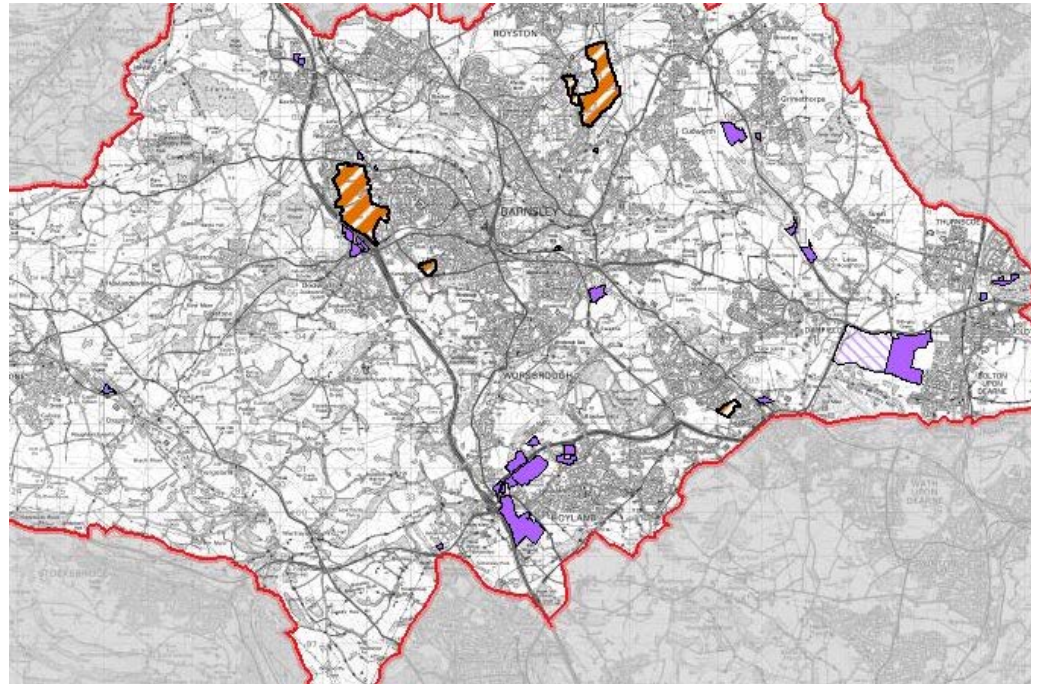
- 6.11 In order to create a potentially viable solution for this site going forward the landowner has prepared proposals for a residential led scheme but with an element of employment use and also a Gas Peaking Plant to provide power to the national grid at peak periods. The landowner has recently refurbished a building and relocated its own regional office to the site. The Gas Peaking Plant and regional office elements are dealt with under separate applications.
- 6.12 The 16.81ha gross development platform includes proposals for up to 270 dwellings and approximately 25,000 sq ft of employment floor space. The employment space has flexibility to provide for a hybrid of light industrial, light manufacture, office and distribution uses. The illustrative masterplan (Appendix 1) is for a medium density level of approximately 20.88 dwellings per hectare. In addition it

shows the location of the Gas Peaking Plant.

7 A Review of the Subject Site and Its Future Potential For Employment use

Local Plan Employment Sites

- 7.1 A thorough review process has been carried out by the Council in preparing its Local Plan to project the amount of employment land required and to allocate employment sites which it considers to have a reasonable prospect of being brought forward for development within the relevant timescale.
- 7.2 The review process has factored in an additional allowance on the amount of land required and also has identified an additional major reserve site should the development projections be exceeded or a site for large foot print buildings be required. The proposed allocated supply of employment land in the emerging Local Plan therefore exceeds the projected requirement by a considerable margin.
- 7.3 The subject site was reviewed as part of the allocation process for the emerging Local Plan as it had a UDP designation for employment use. The consultants employed by the Council concluded that *'should the facility become vacant, given the size and nature of the current site we would expect significant reclamation and contamination issues would need addressing. In general, the location is unestablished for employment space and therefore financial viability will mean higher value uses or public sector assistance would be required'*. It was not taken forward as a future employment site. We would suggest that the Council's planning officers by doing so have acknowledged that the site is not suitable during the projected life of the Local Plan for redevelopment with employment uses.
- 7.4 In identifying potential employment allocations in the emerging Local Plan a number of factors were taken into account the Council in the assessment process. These included 'Location' and 'Accessibility'. A review of the sites shows that the majority and certainly the strategic sites are located either on a motorway Junction (36 and 37) or fronting onto an arterial A road. In respect of the latter, the Dearne Valley Parkway and linked A roads running through the Dearne Valley have the majority of sites alongside. All afford immediate or very close A road access. None are approached by B or unclassified roads as per the subject site. The sniped map taken from the Local Plan Publication Draft 2016 below illustrates this point.



Map 4: Local Plan Publication Draft 2016 Map of Employment Sites

Market Conditions

- 7.5 South Yorkshire has always been a difficult place to achieve financial viability in creating new employment development. Rental and capital values have remained modest when compared against build costs. In addition many sites have had issues resulting in abnormal development costs.
- 7.6 Public sector funding has historically by and large been applied to most schemes to create the viability. Without which developers would not have had the confidence or ability to develop. Between 1995 and 2005 areas of the Dearne Valley had Enterprise Zone status. Whilst only a proportion of this fell within Barnsley it did stimulate significant development in the Borough.
- 7.7 Between 2000 and 2008 Objective One status brought significant levels of public funding to the region and stimulated development. This led to development peaking just as the Credit Crunch took effect in 2008.
- 7.8 We are now in a world where the levels of public funding have been cut significantly, yet there is still a viability gap or at best marginal profitability for developers. Certainly the funding of speculative development is still proving to be difficult for the majority of developers. Whilst an element of development will be carried out by owner occupiers, the majority of development will potentially be developer led.

- 7.9 We believe that Enterprising Barnsley is fully aware of these issues and the Council is looking to proactively support development. Its limited resources to funding, for example through SCRIF are being targeted towards the sites that it considers are most attractive to the developer and occupier markets; essentially at the moment there is a focus on the sites around J36 due to the transport links that they offer.
- 7.10 A significant amount of demand in Barnsley is for industrial/ warehouse units below 5,000 sq ft. This presents a viability issue in carrying out the development of new business units. A high proportion of the demand for units of this type will be from Barnsley based businesses. By the nature of such businesses the covenant strength they offer will be poor and the lease lengths they are prepared to commit to will be short (less than 5 years). From an investment perspective the value that an investor is prepared to pay for an investment of this type will be considerably less than for an investment let to a blue chip covenant on a 10 year plus lease, Without high quality covenants there is a gap between value and cost. This gap has traditionally been bridged through public funding.
- 7.11 The office market in Barnsley has been traditionally weak with demand being at the small end of the spectrum. There has been very little town centre development over the past 30 years, with the exception of the Council's relatively new offices at Westgate and Gateway Plaza. The latter was developed with Objective One funding. It was designed to attract local businesses looking to expand as well as to attract into the town new businesses due to the quality of the space on offer. It failed to do this and was eventually occupied by the Council.
- 7.12 Out of the town centre there was some small scale business park development. The values do not however support the development costs and it is difficult to envisage new office development being carried out in the foreseeable future.

Development Potential of The Subject Site

- 7.13 The existing use of the site is tied up in the history of coal mining in Barnsley. It is not a site that would meet the requirements of a modern industrial park. The major issues centre on location. Firstly the local road network limits accessibility by HGVs. Access for such vehicles by A roads, B roads is blocked by low railway bridges, leaving only access through the village of Shafton or via other unclassified roads.
- 7.14 Whilst HGV's have had no option but to use these minor routes to service the established business on site, businesses that may consider locating to new industrial units on the site would not be prepared to accept using the existing road infrastructure. Furthermore, residents of the villages in which the routes pass through will not find the likely intensification of heavy and noisy traffic to acceptable.
- 7.15 There is also the distance from the motorway network to consider. This is again a priority for many businesses, particularly distribution and is the reason why the bringing forward of major development sites is currently being focused around J36 of the M1.
- 7.16 In order for this site to be a future major employment site, incorporating large scale industrial uses, the road communication needs to be significantly improved. The site needs to be directly accessed by an A grade road. This could be an extension of the link through the Dearne Valley. However, the cost of such is likely to make development of the site unviable.
- 7.17 The subject site itself will be subject to significant abnormal development costs due to its historic use.

The cost of which is estimated at between £3.0 to £4.0 million. At the upper end of the cost scale this could be in excess of £90,000 per gross acre prior to the usual infrastructure costs. It is unlikely that these works could be carried out in phases and this would require a developer to incur the total of these costs up front. In the absence of a major occupier (extremely unlikely due to location and access issues) for a large proportion of the site then the cost of such works will make the site unviable given that even if other issues were satisfactorily resolved the development period would potentially extend into years.

- 7.18 The proposed scheme includes for an element of commercial totalling 25,000 sq ft. It is to be targeted at start-up and medium sized enterprises. Whilst there is no evidence to suggest that there would be market demand in this area from such businesses given the lack of established industrial estate, Enterprising Barnsley are of the opinion that there is a good level of demand at the smaller end of the scale and a lack of quality developments. They consider that the site would be attractive to start up and SME's given the right product at the right price.
- 7.19 The issue with this type of development is that the level of rents and lease terms achievable do not justify the development costs. There is an affordability issue on rent, plus poor covenant strengths of tenants and short lease terms are not attractive to the investment market. This type of development would in the past have been created as part of a regeneration initiative with significant public funding to plug the viability gap and packages of ongoing business support. The capital funding to plug viability gaps for such schemes is no longer available. However, currently Enterprising Barnsley do have various business support packages including mentoring for start-up and small businesses which they would be pleased to use to support an element of commercial development on the site.
- 7.20 Therefore any such commercial development will have to be cross subsidised from the residential development. The level of cross subsidy which could be financially supported as part of financial appraisal will therefore dictate the amount of fundable commercial development. In addition whilst the market indicators suggest there is likely to be demand from smaller businesses there will be a limit to the level of demand. Therefore, there needs to be an element of caution as to the amount of employment space that can be delivered on this site.

8 Conclusions

- 8.1 In conclusion we are of the opinion that the former Monckton Coke and Chemical Works does not form a suitable site for major future employment use. This was also the conclusion of the Council's appointed consultant in 2013 following which the site was not put forward in the emerging Local Plan with an employment classification due to concerns over viability relating to:-
1. Significant reclamation & contamination issues
 2. Location unestablished for employment space
 - 3.
- 8.2 The location suffers from an number of issues:-
1. It is remote from the motorway network.
 2. It does not benefit from access to a major A road, nor is there one in close proximity.
 3. There are limitations in the direction of travel for HGV's due to low bridges.
 4. The roads which access the property are of insufficient size to support intensive HGV traffic.
 5. The village of Shafton through which the majority of HGV traffic will need travel will be adversely affected.
- 8.3 By comparison with the major site allocations in the emerging Local Plan we consider that the subject site competes poorly from a location perspective.
- 8.4 The Council has undergone a significant consultation process to identify sites to be allocated for employment purposes in the emerging Local Plan. There is an ample supply of land that has been identified which includes an excess allocation over the identified requirement. There is no identified future requirement for the subject site.
- 8.5 Viability is a major issue for development in Barnsley. It has been for several decades. However in the past the public funding regime has successfully supported development. Funding levels are now significantly reduced and there is nothing to suggest that these will be increased to anywhere near former levels in the future post Brexit world. The site will not be viable for employment development in isolation at the current time and would need a significant improvement in market conditions for it to be so, along with substantial highway improvements
- 8.6 The Council has identified the development sites it wishes to support with its limited available funding sources. Focus is being given to moving forward the better quality sites; currently those sitting around J36 of the M1. Given the number of site allocations in the emerging Local Plan we would consider that the subject site would be likely to be low order when looking at allocating future funding pots.
- 8.7 We are of the opinion that if the site were to be offered to the market as a major employment site that it would not attract developer interest. Whilst reuse may occur this is only likely to be short term open storage and certainly offering no benefit to the local community. We would envisage that the site could sit in a largely none reclaimed state for many years presenting an unattractive appearance to the landscape.

Yours faithfully



Jeremy Wilson BSc FRICS

For and on behalf of
Knight Frank LLP

Appendix 1 - Masterplan

