



West Cumbria Employment Land & Premises Study



December 2008

DTZ
No. 1 Marsden Street
Manchester
M2 1HW
Tel: 0161 236 9595
Fax: 0161 835 2055

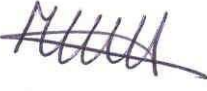



Contents

	Page
1.0 Introduction	1
2.0 Policy Context	4
3.0 Taking Stock of Supply	16
4.0 Qualitative Assessment of Sites	28
5.0 Demand for Employment Space	56
6.0 Gap Analysis	86
7.0 Investment Strategy and Policy Recommendations	95

Appendices

- A - Example Site Proforma
 - B - Qualitative Site Assessment Database
 - C - Report of Consultation
-

Quality Assurance Record	
Checked By:	
Date:	24 December 2008
Authorised By:	
Date:	24 December 2008
Ref: 07/12084-2	

Disclaimer and confidentiality clause

This report should not be relied upon as a basis for entering into transactions without seeking specific, qualified, professional advice. Whilst facts have been rigorously checked, DTZ Debenham Tie Leung can take no responsibility for any damage or loss suffered as a result of any inadvertent inaccuracy within this report. Information contained herein should not, in whole or part, be published, reproduced or referred to without prior approval. Any such reproduction should be credited to DTZ.

Executive Summary

Executive Summary

This report was commissioned by Allerdale and Copeland Borough Councils. It provides an up to date assessment of supply and demand for employment sites in West Cumbria which will feed into the Local Development Framework and wider economic development planning. Its specific objectives are to:

- Assess the future demand and supply for employment land in the area
- Assess the suitability of individual sites, existing, permitted and proposed, for employment uses
- Identify sites which are unlikely to be required by the market or are unsustainable for employment development
- Develop appropriate further policy responses in the light of the supply and demand assessment

Approximately 60 sites have been considered in the analysis of supply and demand, these include employment allocations; existing employment sites where some land/premises remains available; and sites currently in other uses that may be suitable for employment use.

The study acknowledges the significance of Sellafield on employment and the local economy in West Cumbria. However, there is a significant amount of uncertainty regarding the future requirement for employment land and premises directly and indirectly related to Sellafield and the decommissioning process. The focus of this study is therefore to ensure a balanced supply of employment sites across West Cumbria which provides flexibility to cater for spin off opportunities that may arise from activity at Sellafield whilst catering for other employment requirements.

Existing Supply

West Cumbria's main employment areas are found in and around the main towns of Copeland and Allerdale, and many of the areas of employment land comprise more than one industrial estate. There are other notable sites are located throughout the area including in smaller settlements and rural locations.

There is a clear hierarchy of premises on offer in West Cumbria:

- Higher quality office locations suited to local and inward investors, are located at Westlakes Science and Technology Park, Dovenby Hall Estate and Lakeland Business Park. Lillyhall Business Centre provides good quality small scale offices particularly attractive to younger companies
- Mixed quality industrial/commercial premises can be found at Lillyhall which is West Cumbria's major industrial location and is the preferred location of industrial inward investors
- Local industrial occupiers are provided for at a range of locations, particularly Glasson in Maryport, Bridge End in Egremont, Sneckyeat Road in Whitehaven, and Leconfield in Cleator Moor. However the quality in these locations is often poor
- Low end uses are provided for at Glasson, Rise Howe, Derwent Howe and Lillyhall East

- In the most rural areas reasonable quality, modern units can be found in Wigton in North Allerdale and Devonshire Road, Millom and Cross Lane, Seascale in the South of the area

On the surface there is a range of land and premises in terms of the size, type and rental value. However a number of key issues regarding current supply were identified:

- A lack of higher quality offices for general users (not nuclear), especially in Workington and Whitehaven Town Centres
- An over-supply of poor quality, older industrial units throughout the area, and conversely a shortage of modern smaller scale workshop type accommodation, particularly suited to newer businesses
- Lack of focus in supply in rural areas sometimes resulting in a failure to maximise opportunities

Quality of Supply

All the sites identified in the study were subject to a qualitative review which scored performance on a range of criteria under three core themes; market attractiveness; sustainable development and strategic planning.

Many of the sites that scored well overall were in or adjacent to the main town centres of Whitehaven and Workington. However these sites are also suited to non-employment uses or mixed use development which may only include a limited amount of employment space. This raises the question of how to balance competing uses.

Sites in rural areas and on the edge of smaller settlements tend not perform well on sustainability criteria (they are often green field and tend to be accessible to only a small population and often only accessible by car). However they often play an important role in the overall sustainable communities agenda by providing opportunities for local employment and reducing the need to travel.

The qualitative review raises a number of questions for policy makers, in particular:

- Targeting of resources - should resources be focussed on improving the quality of selected sites, for example those which are at the top end of 'moderately performing' to lift them into the highest category? Or should it include some less well performing sites which fulfil a specific need (e.g. sites in rural areas)?
- New allocations - should consideration be given to expanding the allocations of sites which perform well overall? However, this would need to be balanced with the need to reduce the total amount of allocated land and achieving a geographical distribution of employment land
- De-allocation - should the poorly performing sites be de-allocated?
- Role of sites - which lower scoring sites should be retained to accommodate low grade employment uses?

Demand for Employment Space

The different methods of calculating demand (based on past development rates, transactions and enquiries) result in the following ranges of employment land requirements.

Method	Development Rates		Transactions		Enquiries	
	Sq m pa	Ha pa	Sq m pa	Ha pa	Sq m pa	Ha pa
Office (B1)	13,200	3.3	1,704	0.4	1,764	0.4
Industrial (B2 & B8)	2,625	0.7	3,431	0.9	13,029	3.5

- Development rates indicate strong demand for office uses transactions and enquiries which are indicators of occupier demand. However a significant amount of office development has been pump primed by the public sector and as such development rates do not necessarily reflect true market demand
- In contrast transactions and enquiries data indicate much stronger occupier demand for industrial uses. This reflects general churn in the market and the lack of new industrial development in West Cumbria. It probably also reflects the shift in premises provision by the public sector towards B1 (including light industrial) and away from traditional industrial sheds

Employment projections provide indication of the quantum of floorspace and land that will be required based on forecast growth in jobs. The study considered employment projections produced by Experian and Cumbria Vision and produced bespoke DTZ forecasts to estimate the following long-term changes between 2008 and 2023 in West Cumbria. These employment projections indicate:

- Office employment to rise by between 600 and 1,600 jobs. This results in floorspace change of 11,100-29,600 sq m and employment land requirements of 2.8-7.4ha, or 0.2 to 0.5 ha pa
- Continuing declines in industrial employment of between 600 and 1,700 jobs (excluding trends at Sellafield). This results in floorspace declines of 19,200-54,400 sq m and a fall in employment land requirements of 4.8-13.6ha, or -0.9-0.3 ha pa
- Warehousing employment to remain fairly static. Under the Baseline scenario it is estimated to fall by 200, however under the Optimistic scenario around 200 jobs are created up to 2023. This translates into a floorspace requirement of -13,000 sq m to +13,000 sq m and employment land requirements of -3.7 ha to +3.7 ha pa, or -0.3 ha to +0.3 ha pa

	Baseline Land Requirements		Optimistic Land Requirements	
	Sq m pa	Ha pa	Sq m pa	Ha pa
Office (B1)	740	0.2	1,973	0.5
Industrial (B2)	-3,627	-0.9	-1,280	-0.3
Warehousing (B8)	-867	-0.3	867	0.3

From the analysis of past trends and future projections, the following were identified as key features of likely future demand:

- Trends in costs and values mean that West Cumbria was and is likely to remain a marginal location and the public sector will have a key role to play in market creation
- Due to its remoteness West Cumbria is predominantly a locally driven market and is likely to remain so, for all sectors
- The potential of the energy sector is an opportunity which must be harnessed. However it needs to be interpreted in a way which is more appropriate to the private sector. This means a clearer translation into sites and premises implications

- West Cumbria has potential to capitalise on the home working phenomenon. However this will require wider improvements to quality of life in its key market towns
- The Port of Workington could potentially be a key driver in the future given the policy and market push towards multi modal freight
- There is a shortfall in quality of employment space in West Cumbria which needs to be addressed, although values will make this challenging
- Future demand is likely to focus on smaller scale, flexible workspaces; there is also an anticipated growth in demand from the office sector

Gap Analysis

The gap analysis brought together the assessments of qualitative and quantitative supply and future trends in demand, to identify gaps and opportunities in the employment land portfolio. These gaps informed the development of the investment strategy. The key issues for West Cumbria are:

- At a quantitative level there appears to be an adequate supply of employment land
- However there is a lack of quality premises across all uses in West Cumbria. Provision of better quality premises will also be a key factor in supporting economic restructuring in the area, especially if higher value occupiers are to be attracted. However, the delivery of quality premises is hampered by values in West Cumbria, indicating the need for public sector support
- In order to retain short and longer term flexibility within the employment land supply we would recommend that sites are only de-allocated where it is clear they will never be developed for employment use (e.g. due to location, development constraints or other factors) and/or where there is an alternative use which would generate benefits over and above employment uses
- It will be important to maintain a geographic spread of employment opportunities, particularly in view of the rural nature of West Cumbria and accessibility and transport issues. Although the key concentrations are likely to remain at Lillyhall and Westlakes Science and Technology Park, as well as in the town centres, consideration needs to be given to ensuring that there is adequate employment space in isolated rural settlements and ensuring alternative employment opportunities are provided in locations which will be hit hardest by job losses at Sellafield, e.g. Cleator Moor and Egremont
- It may be possible to accommodate some requirements through “landless growth”. Although opportunities for this are less limited in rural than in urban areas, there is some scope through directing developers to opportunities in Workington and Whitehaven town centres and promoting home working and conversions in rural areas

Investment Strategy

The employment land portfolio should comprise a mix of sites appropriate to current and future demand of a range of occupiers whilst allowing a degree of flexibility. This assessment has considered both the quantitative and qualitative supply of employment sites in West Cumbria against current and forecast demand. It has found that there is an oversupply of land in quantitative terms and a huge variation in the quality and characteristics of sites. This section recommends the steps that should be taken to ensure the supply in West Cumbria meets demand.

There are two broad categories of intervention:

- Policy Interventions - to provide the framework for planning and economic development policy and align local, county and regional activity. These are split between cross cutting interventions and site based policy interventions
- Site Specific Recommendations - these relate to the categorisation of the sites and indicate approaches to improve the qualitative performance of sites

Cross Cutting Policy Interventions
<p>Quality of environment - the quality of the environment and public realm is a key factor that impacts upon market attractiveness of sites. The focus of environmental enhancements should be the sites identified as priorities for investment and the sites identified for managements sites in the site based recommendations below.</p>
<p>Quality of life - the overall 'quality of life' offer is important in driving inward investment decisions. This encompasses a range of considerations from housing, education, leisure and cultural facilities. Providing a good quality of life offer is particularly important to attract high value and 'foot-loose' investors and employees in those sectors. West Cumbria's proximity to the Lake District National Park is a major attraction, but the availability of high quality housing and cultural facilities is more patchy. It is important to promote development of higher value housing at appropriate locations and enhance provision of cultural facilities in the Key Service Centres to enhance the overall West Cumbria offer and reduce the pressure on the hot-spots of demand (in and around Cockermouth and Egremont). The scope for enhancing quality of life should be considered in assessing alternative uses for employment sites.</p>
<p>Quality of build - the standard of construction and design that it is possible to achieve is limited by the rental value of employment premises. The prevailing low rental values across West Cumbria mean that it is difficult to deliver high specification premises without public sector support. This is a particular issue raised in relation to development at Westlakes Science and Technology Park.</p>
<p>Home working - it is difficult to predict the impact of home working on the demand for employment land and premises. However, statistics clearly show an increasing trend for home working over the past 10-15 years across the country, but particularly in rural areas. Policies should promote home working as it reduces pressure on land and transport infrastructure and is often associated with self-employment/entrepreneurship. Two key areas for consideration are live/work properties which provide both housing and workspace within one unit; and the provision of 'work hubs' with at a cluster (25 or more) of units and communal areas where workers can share facilities and business support services. Home working and live/work properties are likely to be particularly attractive in rural settlements in West Cumbria where accessibility is poor. The workhubs concept may be suited to Key Service Centres and other smaller settlements. Planning regulations need to be flexible to facilitate development or conversion for live/work and work hubs and to avoid constraining opportunities by enforcing a strict separation between residential and business allocations.</p>
<p>Promote alignment across public sector agencies - there are various public and semi-public sector agencies that influence employment land in West Cumbria. Ensuring consistency across agencies is essential to avoid any potential conflict/duplication regarding the role of sites, their priority and/or proposals for investment. Allerdale and Copeland local authorities should seek to work proactively with West Lakes Renaissance to influence the strategy for their portfolios. The local authorities should also lobby Cumbria County Council as they redefine the categorisation of their sites to ensure it fits with their own priorities.</p>
<p>Supporting business start-up and growth - supporting growth and diversification of the economy through nurturing the emergence and growth of indigenous businesses and attracting inward investment is a key policy objective. Ensuring the availability of appropriate accommodation and facilities is an essential aspect of the overall business and enterprise support package. Recent trends indicate demand for managed workspace which offers communal facilities.</p>
<p>Supporting nuclear sector - West Cumbria is the UK's most important location for nuclear and related advanced engineering, accounting for around a third of the UK's civil nuclear sector. The nuclear industry provides around 40% of West Cumbria's GVA. The Energy Coast Masterplan seeks to build on West Cumbria's nuclear assets and its technology and research strengths to make the area globally recognised as a leading nuclear, energy, environment and related technology business cluster. Allerdale and Copeland local authorities must ensure that the employment land and premises portfolio meets the needs of nuclear sector in order to support this policy and facilitate the growth of the sector. Take up of premises by nuclear related firms has averaged at 2,300sq m per annum. It will be important for the authorities to monitor the rate, specification and location of take-up in order to respond to the dynamic demands of nuclear related businesses.</p>

Site Based Policy Interventions

De-allocation - sites that are very poor quality and/or better suited to alternative uses should be de-allocated in order to reduce the quantitative oversupply and allow resources to be focused on sites that are better prospects. However as noted in existing policy this must not be to the detriment of the overall portfolio of supply.

Loss of employment land - a significant amount of employment land has been lost through the gradual closure of the Rhodia plant and there is a threat of further losses as businesses close or relocate (i.e. Sekers and Alcan). Sites in employment use are provided some protection in policy, however there may be a need to respond more proactively to sites as they arise through negotiations with owners/agents and preparation of supplementary planning documents or development briefs to clearly establish the parameters for redevelopment. The opportunities to retain the sites in employment use through refurbishment/reconfiguration of space should be considered alongside the scope for alternative uses to enhance the overall quality of life in the area (as noted above).

Refurbishment/reconfiguration - a significant amount of demand in West Cumbria is for good quality small/medium sized workspace. Units that are adaptable to meet the changing requirements of occupiers and are available on flexible terms are particularly attractive to small and start-up businesses and are therefore important to encourage entrepreneurship and meet the needs of nuclear supply chain companies (which tend to be small scale). Some of the existing employment stock is too large or outdated to meet the demand of occupiers. The public sector should support refurbishment and reconfiguration of such premises through policy and funding.

Town centre office accommodation - the lack of office accommodation in the town centres is a particular weakness in the existing employment portfolio. Enhancing the availability of quality office accommodation in the key town centres (Whitehaven, Workington and Maryport) through encouraging refurbishment/conversion of town centre premises will be important to respond to the predicted increase in demand for town centre locations over and above business park locations. It will be important to monitor the types of use being developed on the town centre 'mixed use' allocation sites to ensure that an appropriate balance is being struck.

Site Specific Recommendations

The following section sets out the site specific recommendations.

Site Based Intervention Principles

Category	Description
Priority	Sites that should be the focus of investment to ensure they are bought forward for development due to their significance to economic growth and sustainability
Retain	There are four sub-categories:
Management	Sites that do not require significant investment but should remain allocated for employment use as they form part of satisfactorily performing industrial estates/business parks and /or are be important to local economic sustainability of Key Service Centres
Town centre	Sites in and around town centres which are allocated for mixed use and have potential for employment use ¹
Consider alternatives	Sites that could be developed for employment use, but may also have potential for other forms of development. Proposals for non-employment development should therefore be considered on their merits and in the context of overall regeneration proposals for the wider area
De-allocate	Sites should be considered for de-allocation (in whole or part) as they do not perform well on the qualitative indicators and/or do not provide a specific role that would warrant retention

Note: With the exception of Maryport Harbour all sites under this category relate to Whitehaven town centre

The following series of tables identify which sites fall in each category. Commentary on issues relating to key sites are highlighted under each table.

Priority Investment Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
All 2C	Derwent Howe 2/170	75%	0.37
All 1D	Lillyhall (sites)2/010 D	74%	18.00
All 1E	Lillyhall (sites)2/010 E	73%	8.77
C1	West Lakes S & T Pk	73%	35.58
All 13	Port of Workington	71%	6.00
All 2A	Derwent Howe 2/011	71%	1.54
All 1C	Lillyhall (sites)2/010 C	70%	22.05
All 1B	Lillyhall (sites)2/010 B	68%	1.32
All 1A	Lillyhall (sites)2/010 A	67%	8.86
C7	Bridge End Extension	66%	2.90
C8	Leconfield	65%	2.47
			107.86

Lillyhall is the largest site in West Cumbria and makes the largest single contribution to the existing supply (over 50ha). Each quadrant has distinct characteristics and therefore scores awarded in the qualitative assessment vary (between 67-73%). The sites generally score poorly on the sustainability criteria as they are Greenfield and distant from centres of population. However, Lillyhall is amongst the most attractive in market terms and accounts for the largest amount of pipeline development in West Cumbria (with the exception of Sellafeld). It has also benefitted from significant investment from public and private sectors over recent years and provides the market with something that is not offered elsewhere in the employment land portfolio. With regard to this, the scale of development already completed and the scale of opportunity remaining, it is important that the development of Lillyhall is supported to allow it to generate critical mass and become more sustainable and self sufficient. Key recommendations in relation to Lillyhall are:

- Resistance of residential uses
- Integration with existing adjacent employment uses through refurbishment and redevelopment (in particular Alcan)
- Clear differentiation between roles of Lillyhall and Westlakes Science and Technology Park to avoid potentially competing for prospective occupiers
 - Lillyhall is best placed to cater for a broader mix of employment uses and occupiers that require larger format premises. Westlakes Science and Technology Park should continue to be the focus for knowledge based industries (especially those related to the nuclear sector)
 - Defining Lillyhall as the location for skills development and Westlakes Science and Technology Park as the location for research activity
- Focus larger scale occupiers at Lillyhall (rather than sites being sub-divided or incrementally developed for small scales uses) to ensure sites are retained for large scale uses in Lillyhall and reduce the potential for Lillyhall to draw potential occupiers away from other locations, especially regeneration priority areas such as Derwent Howe

Westlakes Science and Technology Park comprises of two main elements; the existing business park and undeveloped serviced parcels or land; and additional land allocated to the north and south. The site is one of the most significant employment sites in West Cumbria, in terms of the role it plays in the local economy and the availability of land (c.8ha in the serviced parcels plus 19ha in additional allocations) and thus is a high priority. Key recommendations in relation to Westlakes Science and Technology Park are:

- Continued promotion of serviced parcels (unlikely to be a requirement for investment in infrastructure in the short-medium term as there is a significant supply of serviced land available)
- Investment in the long term to release extension land (in particular in relation to improving access from the A596). There also appears to be a continued requirement for gap funding to make speculative development feasible within Westlakes Science and Technology Park, in particular to meet the high design and environmental specifications sought
- Differentiate between the role of Westlakes Science and Technology Park and Lillyhall:
 - Westlakes Science and Technology Park should continue to be the focus for knowledge based industries (especially those related to the nuclear sector). Lillyhall is better placed to cater for a broader mix of employment uses and occupiers that require larger format premises
 - Defining Westlakes Science and Technology Park as the location for research activity and Lillyhall as the location for skills development

Bridge End Extension - this site would extend the existing Bridge End Industrial on the edge of Egremont. The site is already the subject of investment from NWDA. Despite the site's topography and green field status it is considered as a priority for investment as it will build on the success of the existing industrial estate and expand local availability of employment land in a key service centre. Bridge End may also potentially cater for nuclear based industries.

Port of Workington - this categorisation of port related sites as high priority is in line with the Regional Spatial Strategy, Regional Economic Strategy and reflects the Port Investment Plan.

Derwent Howe - is a key employment corridor to the south west of Workington. Two sites in Derwent Howe are categorised priorities for investment (much of the remainder is categorised as sites for ongoing management). These sites have good frontage on Solway Road but require investment to address potential ground conditions.

Leconfield Industrial Estate - this site suffers from low demand, however this is understood to be due (at least in part) to the large format of premises available. Consultations have suggested that there may be demand for smaller format premises at this location. There may be scope to meet demand more accurately by investing in redevelopment, reconfiguration and refurbishment. Non-employment uses may be acceptable on part of the site in order to facilitate such investment. It is understood that discussions are progressing with Northern Developments Ltd and Space North West to this end.

Management Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C6	Bridge End Ind Park	78%	5.40
All 5	Lakeland Business Pk	71%	0.70

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C3	Sneckyeat Road	68%	4.85
All 12	Oldside	63%	8.00
C5	Haig Enterprise Park	63%	0.20
All 6	Derwent Mills	63%	1.34
All 4	Dovenby Hall	62%	0.00
All 21	Syke Road	62%	0.33
C30	Rear Main St	59%	0.88
All 19	Aspatia Business Pk, Park Road	58%	2.52
All 10	Rise Howe Ind Est	55%	0.53
C11	Frizington Rd	55%	1.47
C2	Whitehaven Commercial Pk	54%	17.90
All 23	Silloth Harbour	53%	0.16
All 7	Low Road	53%	1.02
C31	Market Square	50%	0.18
C15	Devonshire Road (E11)	46%	3.00
All 8	East Causeway Head, Silloth Airfield	45%	1.80
All 9	St Helens Business Pk	43%	1.30
C12	Cross Lane	43%	0.73
C16	Mainsgate Road Ext	35%	2.34
			54.65

Whitehaven Commercial Park - despite receiving significant public sector investment in servicing and infrastructure, Whitehaven Commercial Park attracts little demand from potential occupiers. Its relatively remote location is often cited as the key detracting factor. The site is the third largest in West Cumbria in terms of available remaining supply (after Lillyhall and Westlakes Science and Technology Park¹) and therefore it has the potential to significantly influence the employment land portfolio. The site is categorised as a management site as there is no requirement for investment as a priority to bring it forward for development, however a proactive approach to management should be adopted, focussing on reinvigorating marketing activity and repositioning it to target general industrial occupiers.

Mainsgate Road Extension, Millom - this site is the only accessible via the existing book repository (which is a key local employer) and provides potential for the business to expand. It therefore should be retained as a management site.

Town Centre Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C23	Bus Station and Garage	78%	0.35
C22	Bus Depot and Old garage (WTC4)	78%	0.18
C21	Quay Street Car Pk	74%	0.30
C28	BT Depot	68%	0.90
All 22	Maryport Harbour	68%	17.94
C26	Jacksons Timber Yd	63%	0.47
C29	Coach Rd	63%	0.63
C24	Albion St (N)	61%	0.27
C25	Albion St (S)	61%	0.22
C27	Preston St	58%	0.45
			21.65

¹ Excluding Maryport Harbour as it is a mixed use site

The key issues in relation to town centre sites are:

- Potentially well suited to employment use, but also suited to other uses such as residential, retail and leisure/tourism. The sites therefore require careful monitoring to ensure appropriate balance of development across the centres
- Potential to promote provision of quality modern office space in main town centres (and in particular Whitehaven)
- Need to consider proposals on their merits. Sites closest to the marina (Bus Station and Old Garage and Quay Street Car Park) may be more suited to tourism related uses, sites nearer the core of the town centre may be suited to office uses whereas sites that are on edge of the town centre towards Pow Beck are likely to be more suited to light industrial employment use
- It is important to note that there may be sites with similar issues in Workington and Maryport, however none were identified to be included in this study

Consider Alternatives Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C14	Pow Beck	69%	8.24
All 14	Former Goods Yd, Derwent Howe	66%	2.50
All 11A	Dock Road 2/124	63%	0.80
All 2B	Derwent Howe 2/152	63%	4.50
All 11B	Dock Road 2/154	60%	2.00
All 3	Main Rd/Hutton Place sites (south of Glasson)	57%	4.80
C10	Cleator Mills	48%	2.76
			25.6

- Pow Beck - two sites within the Pow Beck development brief are earmarked for employment uses. Although employment uses may be appropriate, a flexible approach should be retained to land use on these sites to facilitate wider Pow Beck scheme
- Former Goods Yard, Derwent Howe - this site is the subject of proposals for a transport interchange
- Dock Road, Derwent Howe - these sites occupy a gateway position in Derwent Howe and Port of Workington. Some land assembly may be required to make development feasible and whilst they may be appropriate for employment use, other forms of commercial development may also be appropriate to raise the profile of this location
- Derwent Howe (2/152) - this site is on the western edge of Derwent Howe and is constrained by topography (raised above adjacent land) and poor access. Non-employment uses which address these constraints should be considered
- Main Rd/Hutton Place sites (south of Glasson) - there are two parcels of land within this site, the northern parcel is the former coal wash site which may be suitable for employment or other commercial use, the southern parcel may be suited to soft landscaping as a temporary use to improve the appearance of this gateway site in the short-medium term as part of the Destination Maryport initiative
- Cleator Mills - is subject to proposals for mixed use development

De-allocate

Nine sites are suggested for de-allocation (four of these are de-allocated in the Copeland Local Plan. All sites score poorly on the qualitative assessment (all below 50%) and are either poor quality sites within little prospect of development or are subject to alternative proposals that are considered acceptable. The loss of these sites will not adversely affect prospects for local economic sustainability or the ability to meet the requirements of the target sectors. The cumulative size of the sites is relatively small (20ha) but will go some way in addressing the overall level of oversupply of employment land.

Dealocate Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
All 16	St Helens (opp Dunmail)	61%	0.40
C19	Station Yard	48%	1.46
C4	Red Lonning	48%	1.89
C13	Beckermest Industrial Estate	45%	2.57
C18	Furnace Row	38%	4.20
C20	Rowrah Station Yard Ext	38%	0.86
C17	Millom Pier	32%	3.00
C9	Leconfield Extension	32%	5.28
All 17	Moor Rd	29%	0.95
			20.61

Overall Quantum and Mix

The tables below show that the sites considered in this Employment Land and Premises Study meet projected requirements in terms of overall quantum and have the potential to provide a balanced mix of land that will meet the requirements of various sectors.

Available Land by Category

Category	Total available supply (Ha)
Priority	107.86
Retain	
Management	54.65
Town centre	21.65
Consider alternatives	25.60
De-allocate	20.61
Total (excluding de-allocations)	209.76

Key Available Sites by Suitability to Use Class

Use Class	Key Sites
B1 (a) Office	Town Centre sites Lakeland Business Park
B1 (b) research and development	Westlakes Science and Technology Park
B1 (c) light industrial	Lillyhall Leconfield Bridge End Extension Key Service Centre Sites
B2 General industrial	Whitehaven Commercial Park Lillyhall Powbeck
B8	Lillyhall
Port related	Port of Workington Oldside

Note: This list is not intended to be exhaustive or exclusive

1.0 Introduction

Overview

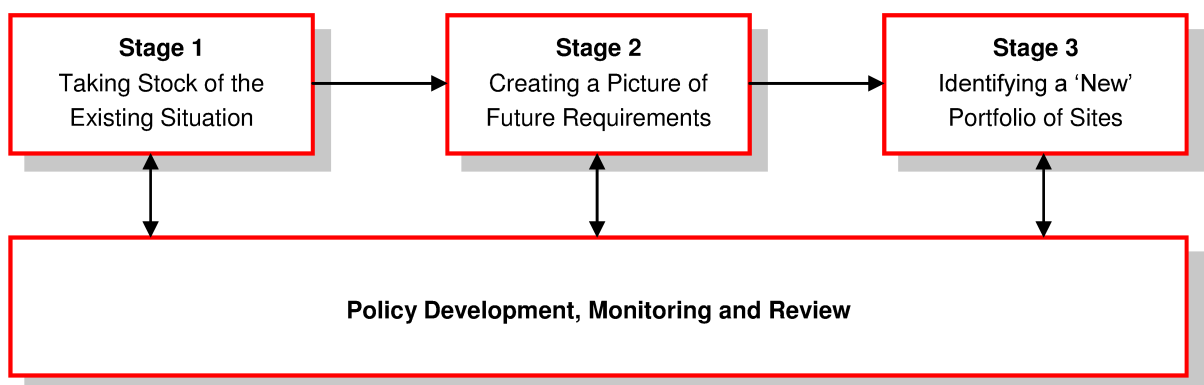
- 1.1 This report was commissioned by Allerdale and Copeland Borough Councils. It provides an up to date and balanced assessment of the portfolio of employment sites which will feed into the Local Development Framework and wider economic development planning.

Background and Purpose of Study

- 1.2 The report assesses supply of and demand for employment sites in West Cumbria. Its specific objectives are to:
- Assess the future demand for employment land in the area, by use class
 - Assess the future supply of sites for employment uses
 - Assess the suitability of individual sites, existing, permitted and proposed, for employment uses
 - Identify sites which are unlikely to be required by the market or are unsustainable for employment development
 - Develop appropriate further policy responses in the light of the supply and demand assessment

Approach

- 1.3 The approach is in accordance with the three stage approach set out by CLG and as set out below.



Sites Considered in this Study

- 1.4 The table below lists the sites considered in the analysis of supply and demand in this study. The Steering Group identified the sites at the inception of the study - the objective being to consider: employment allocations; existing employment sites where some land/premises remains available; and sites currently in other uses that may be suitable for employment use.
- 1.5 During the course of the commission three sites were excluded from the analysis as it became apparent that they were either completely developed or no longer available for employment use: Plot D Reedland Road; Annie Pit Lane; and South of UCB. During the commission two additional sites were identified for consideration (the former Alcan site and Oldside East). These have been considered in the supply and demand conclusions in context of the quantitative and qualitative assessments of the sites listed below (but are not listed separately below).

Table 1.1 Sites considered in the Employment Land and Premises Study

Allerdale		Copeland	
All 1A	Lillyhall (sites)2/010 A	C1	Westlakes Science and Technology Park
All 1B	Lillyhall (sites)2/010 B	C2	Whitehaven Commercial Park
All 1C	Lillyhall (sites)2/010 C	C3	Sneckyeat Road
All 1D	Lillyhall (sites)2/010 D	C4	Red Lonning
All 1E	Lillyhall (sites)2/010 E	C5	Haig Enterprise Park
All 2A	Derwent Howe 2/011	C6	Bridge End Ind Park
All 2B	Derwent Howe 2/152	C7	Bridge End Extension
All 2C	Derwent Howe 2/170	C8	Leconfield
All 3	Glasson Ind Est	C9	Leconfield Extension
All 4	Dovenby Hall	C10	Cleator Mills
All 5	Lakeland Business Pk	C11	Frizington Rd
All 6	Derwent Mills	C12	Cross Lane
All 7	Low Road	C13	Beckermest Industrial Estate
All 8	East Causeway Head, Silloth Airfield	C14	Pow Beck
All 9	St Helens Business Pk	C15	Devonshire Road (E11)
All 10	Rise Howe Ind Est	C16	Mainsgate Road Ext
All 10	Rise Howe Ind Est	C17	Millom Pier
All 11A	Dock Road 2/124	C18	Furnace Row
All 11B	Dock Road 2/154	C19	Station Yard
All 12	Oldside	C20	Rowrah Station Yard Ext
All 13	Port of Workington	C21	Quay Street Car Pk
All 14	Former Goods Yd, Derwent Howe	C22	Bus Depot and Old garage (WTC4)
All 16	St Helens (opp Dunmail)	C23	Bus Station and Garage
All 17	Moor Rd	C24	Albion St (N)
All 19	Aspatria Business Pk, Park Road	C25	Albion St (S)
All 20	South of UCB	C26	Jacksons Timber Yd
All 21	Syke Road	C27	Preston St
All 22	Maryport Harbour	C28	BT Depot
All 23	Silloth Harbour	C29	Coach Rd
		C30	Rear Main St
		C31	Market Square

Note: The following sites were excluded from the study during the course of the commission: Plot D Reedland Rd (All 15); Annie Pit Lane (All 15); South of UCB (All 20)

Sellafield

- 1.6 Sellafield has massive bearing upon employment and the local economy in West Cumbria and therefore is an important consideration in terms of demand and supply for employment land. The site accounts for the largest share of employment West Cumbria and 90% of all manufacturing jobs in Copeland. The significance of Sellafield for the local, regional and national economy is demonstrated by the weight afforded to it in policy, (see section 2 Policy Context).
- 1.7 However, there is a significant degree of uncertainty regarding the future requirement for employment land and premises directly and indirectly related to Sellafield and the decommissioning process. Therefore this study seeks to ensure a balanced supply of employment sites across West Cumbria whilst seeking to ensure flexibility to cater for spin off opportunities that may arise from activity at Sellafield.

Report Structure

- 1.8 The remainder of the report is set out as follows:
- Section 2: Policy Context
 - Section 3: Supply of Employment Sites
 - Section 4: Qualitative Assessment of Sites
 - Section 5: Demand for Employment Sites
 - Section 6: Gap Analysis
 - Section 7: Investment Strategy and Policy Implications

2.0 Policy Context

National

- 2.1 The **Sub-National Economic Development and Regeneration Review** (2007) provides an overall strategic context, giving local authorities and regions greater incentives to drive local prosperity, economic growth and regeneration. The paper sets out measures to optimise the economic potential of cities whilst simultaneously tackling social deprivation. A key part of this focuses on the need to ensure that local authorities meet the requirements of businesses to create conditions for economic growth.
- 2.2 The requirement for Employment Land Review as part of the development planning process was set out through the **Planning and Compulsory Purchase Act (2004)**. Further guidance has subsequently been issued in the form of a guidance note². The specific objectives of the guide are to assess future demand and supply for future employment land, the suitability of individual sites, and identify sites that are no longer required or are unsuitable. In doing so it informs the preparation of development plan documents.
- 2.3 National planning policy provides a strategic framework for spatial development, with which all planning policy at the regional and local level must be consistent. **Planning Policy Statement (PPS) 1** sets out sustainable development as the overarching principle and objective of the planning system. Planning is to advance sustainability by bringing forward sufficient land of a suitable quality to meet the expected need for economic development, whilst balancing this economic need with social and environment demands.
- 2.4 National policy relating to industrial and commercial development is set out in **Planning Policy Guidance (PPG) 4**. This seeks to promote economic development in balance with environmental considerations, with up-to-date, detailed evidence base necessary to reconcile these interests. Furthermore, it states that “the locational demands of businesses are...a key input to the preparation of development plans. Development plan policies must take account of these needs and at the same time seek to achieve wider objectives in the public interest” (paragraph 10).
- 2.5 PPG4 is to be replaced by Planning Policy Statement (PPS) 4. The **consultation draft of PPS 4** broadly supports the PPG4 approach with paragraph 9 stating: “To fulfil this role, planning strategies, at every spatial level, must be underpinned by a robust evidence base to enable regional planning bodies and local planning authorities to plan effectively and to develop policies which allow a quick response to changing economic circumstances.”
- 2.6 However, PPS4 does prescribe a more flexible approach in recognition of the fact that future economic performance is difficult to forecast.

² Employment and Land Review Guidance Note (ODPM, 2004)

Regional

Draft Regional Spatial Strategy (RSS)

- 2.7 The RSS is driven by a number of spatial priorities - firstly the regional centres Manchester and Liverpool and secondly the inner areas surrounding the regional centres. The third priority for growth is 29 secondary towns and cities outside of the regional centre, including Workington and Whitehaven. The RSS seeks to focus growth on the centres and inner areas, emphasising areas in need of regeneration. The RSS notes in particular the need to generate employment opportunities in West Cumbria, focusing on Barrow, Whitehaven and Workington. These settlements are noted as potential locations for Regionally Significant Employment. This should be located close to transport nodes within the urban area.
- 2.8 The RSS sets out a recommended quantum of provision of employment land. The RSS states that at least 30% of sites should be available (i.e. fully serviced and marketed). For Cumbria the RSS identifies a requirement of 399 ha of employment land between 2005 and 2021. This is equivalent to an over-supply, based on current allocations, of 234 ha. However RSS does recognise the specific issues in Cumbria relating to dispersed settlement patterns and geographic isolation which mean that a greater degree of choice and flexibility is required to serve discrete labour markets. Where de-allocations are considered these should be focused on sites which are poor quality, poorly located or unlikely to become available for development in the foreseeable future. There is a presumption against release of sites which have the potential to provide an important contribution to the economy of the local area. This does not mean that new sites cannot be brought forward, especially those which are more attractive to the market, as long as the overall scale of supply is reduced.
- 2.9 The framework notes the specific issues in rural areas, and in particular the pressing need for agricultural diversification in sparsely settled areas. This will involve finding new and innovative uses for agricultural buildings, ideally for economic activity which has some relevance to the local area. The RSS also identifies a need to understand the implications of greater home working on employment land requirements.
- 2.10 The housing policy set out in the RSS also has potential implications in terms of future alternative uses for employment land. RSS recognises the need for housing market restructuring in West Cumbria and Furness. In Allerdale a target is set of 4,800 new dwellings outside of the National Park between 2003 and 2021 (267 pa), and in Copeland the target is 4,140 (230 pa).
- 2.11 The overall spatial policy for Cumbria sets out the following principles of relevance to this study:
- Focus major development within Barrow in Furness, Whitehaven, Workington and Carlisle
 - Provide for appropriate development in key service centres and local centres
 - Provide a portfolio of employment sites
 - Support the restructuring of housing markets in West Cumbria and Furness
 - Support the development of higher value knowledge based and specialist industry based employment opportunities

2.12 RSS sets development priorities for sub-areas in Cumbria: Carlisle, West Cumbria, Furness and South and East Cumbria. For West Cumbria these are:

- Develop the roles of the existing centres of Whitehaven, Workington, Cleator Moor and Maryport in a complimentary manner
- Exploit the potential offered by the local workforce in the field of nuclear research, development and decommissioning
- Maximise the potential offered by the presence of the University of Cumbria to build a knowledge based economy
- Explore the potential for tourism based development

North West Regional Economic Strategy (2006)

2.13 The North West Regional Economic Strategy (RES) aims to continue the transformation of the regional economy by building on the region's assets and tackling areas of significant under performance. The strategy sets out to lower the £13 billion output gap between the North West and the England average. The RES identifies three major drivers:

- Improving productivity and growing the market (£10 billion of the gap) by focusing on retaining and increasing the number of added value jobs in the region
- Growing the size and capability of the workforce (£3 billion of the gap) through skills development and accessibility improvements, focusing in particular on deprived areas
- Creating the conditions for sustainable growth, matching a thriving economy with high quality natural and built environment, high quality local services and good transport connections

2.14 The RES highlights that Cumbria contributes 6% or £5.5 billion to the regional economy. Poor economic performance in the sub-region has been exacerbated by contractions in manufacturing (shipbuilding and nuclear) and agriculture.

Cumbria Assets and Opportunities

- Tourism, food and unique nuclear sectors
- Tourism - The Lake District
- Broad rural economy
- New University
- Prospects of growth in indigenous enterprises, maritime and creative industries
- Excellent broadband infrastructure

Key Challenges

- Slowest growth rate of all UK sub-regions
- Over-dependence on public services, distribution, manufacturing and agriculture
- Low wage economy
- Low skill and qualification levels
- Very high proportion of small firms
- Few jobs in business and financial services
- Poor connectivity and remoteness from areas of growth
- Low concentrations of population
- High concentrations of economic inactivity

2.15 The RES highlights a number of 'target' sectors in two groups:

RES Internationally competitive sectors	RES Sectors with large and widespread employment
<ul style="list-style-type: none"> ▪ Biomedical ▪ Energy and environmental technologies ▪ Advanced engineering and materials ▪ Food and drink ▪ Digital and creative industries ▪ Business and professional services 	<ul style="list-style-type: none"> ▪ Maritime, distribution, aviation ▪ Construction ▪ Visitor economy ▪ Retail ▪ Public sector ▪ Care/healthcare

2.16 The RES identifies a series of transformational projects by geographic area. West Cumbria is linked in with East Lancashire, Blackpool and Barrow, given their common need for regeneration:

- Priority is afforded to West Cumbria in relation to the development of the North West's nuclear capability, through development of an integrated economic plan for West Cumbria and specific projects such as the National and North West Nuclear Skills Academy
- Develop the role of higher education in transforming the economy with specific reference being made to the development of the University of Cumbria
- The need to diversify the economic base in rural areas is advocated by supporting sectors with growth potential, focusing in particular on lagging rural areas including Allerdale and Copeland

2.17 The RES identifies 25 strategic regional sites. Only two of these are in Cumbria - Kingmoor and Westlakes Science and Technology Park - and only one, Westlakes Science and Technology Park in West Cumbria. The intention is to prioritise the sites for cluster development, business incubation and university spin-outs of regional importance, in addition to providing high quality locations for both indigenous and inward investment. The sites are also critical to meeting regeneration objectives.

Sub-Regional

Cumbria and Lake District Joint Structure Plan (JSP)

2.18 The Cumbria and Lake District Joint Structure Plan (JSP) was adopted in April 2006 and covers the period 2001-2016. The Planning and Compulsory Purchase Act 2004 introduced a new planning system comprising Regional Spatial Strategies (RSSs) and Local Development Frameworks (LDFs) (abolishing the system of structure plans and local plans). Until the new RSS and LDF system is established the JSP will provide the sub regional planning framework for West Cumbria. During the transitional period relevant policies contained in the JSP will be 'saved' from three years from adoption and if necessary that period may be extended.

2.19 The key 'saved' JSP policies relevant to this study are:

- EM13 Employment Land Provision - aims to ensure an appropriate and readily available supply of land for employment uses. It identifies employment land in each local authority;

groups the supply in terms of sub county area and market sector; and phases release across three phases during the lifetime of the plan

- EM14 Development of employment land for other purposes - states that non-employment uses will be considered on existing employment sites where: the site or premises is likely to remain unsuitable for employment purposes; or the retention of the site or premises is not needed to satisfy the requirements of the Key Service Centre or market sector (i.e. policy EM13)

2.20 The JSP states that to meet the requirements of EM13 and EM14 Local Planning Authorities will need to review land allocated for employment purposes in existing Local Plans to assess its suitability. It recognises that not all land will be appropriate or will continue to be needed, but highlights the need for a evidence is that there is an excess in the supply of land in certain market sectors and sub county areas.

2.21 The JSP specifies that only employment sites that are considered to be unsuitable over the full Structure Plan period or are in excess of the requirements of Policy EM13 will be appropriate for other uses. In assessing whether a site or premises is “unsuitable” consideration will need to be given to the availability and quality of alternative sites or premises, the condition of the site or premises, service infrastructure capacity, and the views of economic development agencies for the area.

Cumbria Vision Economic Plan: Draft for Consultation (2007)

2.22 Cumbria’s vision is “To be the fastest growing economy in England”. In order to achieve this the strategy seeks to take a two pronged approach:

- Capitalising on the many existing strengths of the County
- Encouraging growth in areas with growth potential where we are underperforming

2.23 The strategic priorities are structured around three themes “Business, Enterprise and Employment”, “Education and Skills” and “Infrastructure”.

2.24 The Plan has been translated into 11 strategy action plans. The first six of these focus on key target sectors for growth:

- Energy and environmental technologies
- Specialist manufacturing
- Tourism
- Food and drink
- Digital, cultural and creative industries
- Outdoor sport and recreation

2.25 The other five are thematic focusing on:

- Employment, education and skills
- Housing
- Business and enterprise

- Rural and agriculture
- Connectivity

2.26 A number of key projects are identified as being key to the delivery of the Economic Plan. One of these is the “Energy Coast Masterplan” for West Cumbria.

“Britain’s Energy Coast” West Cumbria Spatial Masterplan (2007)

2.27 The West Cumbria spatial masterplan is a 20 year plan for the development of the economy of the sub-region. Job losses at Sellafield and in the supply chain as a result of nuclear decommissioning will have a significant impact on West Cumbria, most notably Copeland where 58% of employees of Sellafield are resident. Without intervention it is anticipated that decommissioning will reduce the value of the West Cumbrian economy from £3.5 billion pa to £3.1 billion pa.

2.28 The masterplan sets out West Cumbria’s economic opportunities, especially its focus for knowledge intensive nuclear/energy related business, and its significant economic problems – low GVA, above average unemployment, structural weaknesses in the economy and significant social deprivation. West Cumbria’s geographic remoteness is also highlighted. This remoteness is exacerbated by poor road communications.

2.29 The aims and objectives of the plan are therefore to:

- Help the area grasp the opportunities offered by decommissioning
- Ensure the local economy successfully adapts to the decline in employment at Sellafield
- Sets the framework for private sector investment, building on decommissioning opportunities and diversifying the local economy particularly around nuclear, energy and environmental technologies
- Identify a series of transformational and projects which will stabilise the economy, including flagship and enabling initiatives
- Prioritise and coordinate activity
- Set out a partnership with Government to develop wider energy (supply) and environmental solutions

2.30 The vision is for West Cumbria to create an ‘energy and environment and technology cluster’, Britain’s “Energy Coast” which will become recognised as a unique global brand.

Vision for West Cumbria

By 2027 West Cumbria will be a confident place that prides itself on its strong economy providing opportunities for all and offering a lifestyle of choice. It will:

- Be globally recognised as a leading nuclear, energy, environment and related technology business cluster, building on its nuclear assets and its technology and research strengths
- Be a strong, diversified and well connected economy, with a growing, highly skilled population with high unemployment

- Project a positive image to the world, and be recognised by all as an area of scientific excellence, outstanding natural beauty and vibrant lifestyle, which attracts a diverse population and visitor profile
- Provide opportunities for all its communities, where geography is not a barrier to achievement and where deprivation, inequality and social immobility have been reduced

- 2.31 The masterplan seeks to harness the potential opportunities presented by nuclear decommissioning in order to mitigate job losses and to diversify the economy building upon West Cumbria's existing skill and knowledge base in the energy sector. Nuclear market opportunities revolve around the decommissioning of Sellafield in the first instance, then building upon this to harness national and global opportunities in nuclear and non-nuclear decommissioning and to diversify and exploit other related markets.
- 2.32 Specific opportunities for growth in the field of environmental technology include:
- Assessment and remediation of contaminated land (applying nuclear experience to non-nuclear)
 - Nuclear new build
 - Development of high energy efficient technologies and energy conservation
 - Future energy – energy storage technology, renewable energy, localised energy production
 - Remote monitoring and handling including remote sensing and robotics
 - Nanotechnology toxicology, linked to healthcare sciences
- 2.33 The spatial strategy involves the development of an energy and environment cluster in a coastal corridor from Sellafield to Workington. The provision of land and property in suitable locations and of an appropriate type and quality will be an essential factor in achieving these ambitions. Sellafield and associated sites would be the centrepiece; other key locations are Westlakes Science and Technology Park, Lillyhall Business Park, Workington and Whitehaven. Industrial and business parks around Egremont, Cleator Moor and Whitehaven will be important in supporting new enterprises in the cluster and providing local opportunities for communities most affected by decommissioning.
- 2.34 Key projects already identified which can be linked to a specific site or sites or location are as follows:

Project	Site/Location	Progress (Sept 2008)
National nuclear laboratory expansion	Sellafield and satellite at Westlakes Science and Technology Park	Still in discussion
Dalton Cumbria Facility	Westlakes Science and Technology Park	Still in negotiation. In Sept Dalton Institute awarded £5 million to fund nuclear education and research at its facilities.
Nuclear Academy North West	Lillyhall	To be located in the Energus Building on Lillyhall Business Park currently under construction

Project	Site/Location	Progress (Sept 2008)
Conference and meeting facilities	Possibly , Derwent Howe, Pow Beck, Dovenby and/or Whitehaven	Study into conference facility provision throughout Cumbria commissioned by Cumbria Vision. Results not provided to this study
Enterprise Hubs (like the Network Centre Millom)	Up to 6 in key centres of population - Millom, Egremont, Cleator Moor, Maryport, Whitehaven, Workington	Locations and details to be determined.
University of Cumbria	Lillyhall (and connections to Westlakes Science and Technology Park)	Phase 1 to be located in Energus building, due to open 2009. University has option on Lillyhall Business Park for next phase
New acute services hospital and health campus	TBD	Several sites under consideration by the Hospital Trust, including sites at Lillyhall and Westlakes Science and Technology Park and the Ginns in Whitehaven

2.35 There will be other more general needs relating to both office and industrial uses which will require new premises and it is essential that land is provided to deliver this. The masterplan notes a shortage in high quality business accommodation and in business meeting and conference facilities. Furthermore despite an apparently high employment land supply, there is also a lack of readily available sites.

2.36 The masterplan sets out a hierarchy of sites as follows.

Category	Site Name	Proposed Use
Strategic Sites	Westlakes Science and Technology Park	High quality offices
	Lillyhall	Large scale manufacturing Nuclear related
Short Term Priorities	Leconfield, Cleator Moor	Industrial Nuclear decommissioning Possible release of some land
	Bridge End, Egremont	Expansion of existing nuclear related, plus small workshop/office
	Moresby Parks/Whitehaven Commercial Park	Not specified
Medium Term Priorities	Derwent Howe	Mixed use - commercial, leisure, education, retail
	Dock Road Area, Workington	Port related
	Glasson Industrial Estate, Maryport	Focus on small units to meet indigenous demand, relocate heavy industry
	Pow Beck	Mixed use - retail, commercial, sports. Employment, residential
	Derwent Forest	Tourism and leisure
Other Key Sites	Cleator Mills	New executive housing
	Devonshire Road, Millom Other industrial estates/business parks	Reconfigure to meet local needs, especially through reducing size of units

2.37 The masterplan also notes the potential for (limited) attractive and high quality premises in Key Service Centres and Local Service Centres within the National Park, from Keswick to the west coast, which could support the objectives of Energy Coast.

- 2.38 Creative communities are another area of suggested growth. It is suggested these should be encouraged to cluster around Whitehaven and Maryport harbours.
- 2.39 The masterplan also flags up the potential of West Cumbria to offer a high quality of life and the need to maximise the ICT opportunity, building upon Digital Whitehaven, to facilitate remote working. It suggests there may be potential for live-work units and networks to support remote workers.
- 2.40 Improvements to connectivity are also critical to West Cumbria's future economic success:
- The Parton-Lillyhall Scheme which involves the construction of a new 5.1km two-lane dual carriageway commenced in 2007
 - A study of the Port of Workington has resulted in a 10 year investment plan
 - PFI funding has been approved for the Carlisle Northern Development Route which will improve connections between West Cumbria, Scotland and the North East of England
 - Major redevelopment plans for Carlisle airport have been announced with the prospect of flights to London in 2-3 years and possible expansion into air freight distribution
- 2.41 A series of other transport priorities are identified in the masterplan:
- Improvement of the A66 strategic route into Cumbria
 - Improvements to local pinch points around Whitehaven and Workington - priorities include the Whitehaven Eastern Bypass, the Workington Southern Link, A5086 improvements (Egremont to Cockermouth) and Pow Beck Spine Road
 - A595 improvements North and South (low cost improvements)
 - Development of marina and port facilities in Whitehaven and Maryport
 - Explore opportunities for a West Cumbria airfield
- 2.42 Funding commitments have not been made to any of these projects.
- 2.43 The Masterplan notes the importance of providing a choice of high quality housing to attract new workers. It specifically notes opportunity locations around Egremont, Cleator Moor, Cleator Mills, east of the A595 corridor and south of the A086. It identifies potential for the release of poorly performing or vacant commercial sites for residential use.

Cumbria Employment Land Study

- 2.44 The study was undertaken to identify a number of sub-regional investment sites for inclusion in NWDA's investment portfolio, worth approximately £10 million. The study demonstrated an undersupply of truly available employment land in all parts of Cumbria, except Copeland. It also highlighted a shortfall in sites which meet modern needs, especially within the business/science park market sector.

2.45 All the sites recommended for investment by the study are in Carlisle or South Lakeland:

- Canal Head, Ulverston
- Shenstone House, Kendal
- Rose Hill Industrial Estate Car Park, Carlisle
- Durren Hall Industrial Estate and extension, Carlisle
- Upperby Rail Sidings, Carlisle
- Petrol Terrace, Carlisle

2.46 Site exclusions were predominantly for market demand reasons, especially in West Cumbria where it was considered there tends to be an oversupply of land and a lack of evidence of demand for any additional land. Sites along the West Coast were also identified as having highly limiting strategic access constraints.

Local

Lake District National Park Employment Land Study

2.47 The study was undertaken by Arup's for the Lake District National Park Authority (LDNPA). Key findings which have implications for West Cumbria are set out in the paragraphs which follow.

2.48 The main issue in the Lake District is the shortage of available land to accommodate large scale employment development. As a result the Lake District will continue to cater for new and existing businesses while some successful ones will move outside of the National Park to enable them to expand. This issue is exacerbated due to the pressure for release of employment land in the National Park for alternative uses, especially residential and leisure. The authority is encouraged to work with larger than average employers to discourage them from locating 'entirely' elsewhere in Cumbria.

2.49 This shortage of land is highlighted in the following figures:

- Only 3.7 ha or five sites were ranked as 'best' sites, four of which are allocated and one has a valid planning permission
- Only eight sites had vacant land recorded on them
- Six sites had under-use identified amounting to half of the opportunity land identified, combined to equal 2.0 ha

2.50 The employment land supply equates to only around six years. As a result the LDNPA needs to identify additional land for employment uses. The study recommends:

- A focus on the following larger settlements: Gosforth, Bootle, Braithwaite, Broughton in Furness, Lindale, Portinscale, Staveley, and Threlkeld
- Protection of the 'best', high scoring sites

- Identification of new land in areas where there is currently no or little supply and where there is identified demand, such as large and medium sites in Copeland
- Identification of a site for the development of a business park within the National Park to meet the needs of knowledge based higher value businesses
- Protection of the largest sites irrespective of the overall score
- Giving consideration to the expansion of existing sites including outside the existing settlement boundaries
- Working with other neighbouring authorities to coordinate activity

2.51 Overall the study requires the LDNPA to take a more pro-active approach to employment development, although this does include joint working with adjacent authorities, particularly Copeland.

Copeland Local Plan

2.52 The Copeland Local Plan identifies economic regeneration as fundamental to creating a good quality of life in Copeland. The Council wishes to encourage a diverse economy, healthy town centres, access to jobs for all who want them and social exclusion addressed. The planning system has a key role to play in achieving these objectives by:

- Identifying a supply of employment land
- Making town centres more attractive for investment
- Encouraging the development of tourism
- Supporting the rural economy

2.53 To counteract the projected loss of jobs from the nuclear industry from 2010 onwards and continued decline in the manufacturing sector the Council is seeking to attract 8,500 jobs over the plan period to 2015. These will be in sectors which can operate competitively in a peripheral location. The Local Plan recognises that the requirements of these sectors are such that mixed use policies may be more appropriate in some locations than employment policies.

2.54 The plan states that new job opportunities for over 7,000 people are required over the plan period. It is important to ensure a range of sites are available which are attractive, accessible, services and environmentally acceptable. The plan proposed approximately 88 ha of employment land, sub-divided into:

- Business/Science Park (Westlakes Science and Technology Park): 50 ha
- Strategic employment (Whitehaven Commercial Park): 13 ha
- Local Employment Sites (several): 24 ha

2.55 The plan also identified three employment opportunity sites: Former Marchon Site in Whitehaven, Whitehaven Pow Beck Development and Leconfield Industrial Estate.

Allerdale Local Plan

- 2.56 Large parts of the Plan Area owe their rapid early development and prosperity to the growth of the coal and steel industries. Not surprisingly, the demise and contraction of these industries has led to a loss of that prosperity and a legacy of other problems. Despite considerable diversification of the local employment base, the symptoms of the decline of these traditional industries are still evident, especially in the southern part of the Plan Area. Elsewhere in the Plan Area the employment structure is more akin to a predominantly rural area. Employment problems in the northern parts of the Plan Area are a result of continuing decline in agricultural employment and incomes, leading to a need to diversify the rural economy and a historic over-reliance in each of Wigton, Silloth and Aspatria upon one or two major employers leading to a need to diversify the urban economy in the north.
- 2.57 The Plan seeks to set up a framework of policies and proposals which will lead to the development and expansion of the local economy, encourage a greater number and variety of local job opportunities to meet local employment needs and to further reduce the level of unemployment. The following more specific aims are:
- To encourage a steady growth in employment
 - To achieve a sustainable pattern of development
 - To allocate a Strategic Employment Site, Business Parks and Local Employment Sites in appropriate locations
 - To encourage both inward investment and diversification of the local economy
 - To encourage the provision of new road links where appropriate
 - To encourage the development of “brownfield” sites in preference to “greenfield” sites
 - To seek to co-ordinate the provision of new housing and new job opportunities
 - To encourage the provision of training and education facilities
 - To encourage rural businesses and farm diversification
- 2.58 The plan identifies 138 ha of allocated supply throughout the District. The plan has a clear focus on the Workington/Maryport/Cockermouth triangle and recognises the need to drive employment development here to meet regeneration objectives. Lillyhall is identified as the key opportunity, and others are Derwent Howe, Glasson and Port of Workington. Key settlements in rural areas are also identified priorities, specifically Wigton, Silloth and Aspatria.

Implications for Employment Land Review

- The policy environment focuses on economic restructuring and diversification in West Cumbria
- In West Cumbria key opportunities are identified as the energy/nuclear sector. The challenge will be translating these aspirations into land and premises needs
- There is a clear focus on town centres and Key Service Centres and these are identified as the locations in which development should be concentrated
- The loss of employment from traditional industries and the nuclear sector will not all be replaced by higher value industries. As a result it is essential not to lose sight of more general employment needs in employment land planning

3.0 Taking Stock of Supply

Introduction

- 3.1 This section provides an audit of the existing and pipeline supply of sites and premises across West Cumbria. It is split into two main sections:
- Existing Supply - describes the main existing employment areas in West Cumbria, the trends in total employment floor space, the extent to which supply has been reduced by loss of employment land to alternative uses. It concludes by providing a snapshot of business premises currently available
 - Pipeline Supply - considers supply of employment premises across West Cumbria by identifying developments under construction, with planning permission and other emerging proposals for development

Existing Supply

Key Existing Employment Areas

- 3.2 West Cumbria's main employment areas are found in and around the main towns of Copeland and Allerdale, and many of the areas of employment land comprise more than one industrial estate. There are other notable sites located throughout the area including the smaller settlements and rural locations.
- 3.3 The table below summarises the largest and most significant areas of employment land in West Cumbria. The table shows the 'market sector' assigned to each by Cumbria County Council and area of land currently available. Further commentary on each area is provided below.

Table 3.1 Key existing areas of employment

Area/Site name	Category	Currently available area (ha)
Allerdale		
Lillyhall	Strategic Employment and Local Employment	52.48
Derwent Howe (Clayflats)	Local Employment	6.04
Industrial belt between Workington and Maryport <ul style="list-style-type: none"> St Helens Business Park St Helens Business Park, Flimby Risehow Business Park 	Local Employment	2.23
South of Maryport <ul style="list-style-type: none"> Glasson Industrial Estate Solway industrial Estates 	Local Employment	4.8 ¹
Derwent Mills, Cockermouth	Local Employment	1.34
Lakeland Business Park, Cockermouth	Business Park	0.7
Copeland		
Westlakes Science and Technology Park	Business Park	24.66 ²
Whitehaven Commercial Park	Strategic Employment	12.93
Sneckyeat Road Industrial Estate, Whitehaven	Local Employment	1.72
Bridge End Industrial Estate, Egremont	Local Employment	2.9 extension ³
Leconfield Industrial Estate, Cleator Moor	Local Employment	5.28 extension ³
Devonshire Industrial Estate, Millom	Local employment	-

¹Allerdale Borough Council's pipeline supply database identifies 5.74ha relates to Glasson Industrial Estate. No figure available for Solway Industrial Estate

²From Westlakes Properties (17ha allocated in the extension plus 7.66 serviced in plots)

³Existing Industrial estates fully developed, but land available in adjacent extension sites

3.4 The following provides a brief description of the employment areas identified in the table above:

- **Lillyhall** - Lillyhall is Allerdale's main employment area. It is a large (160ha) predominantly manufacturing and distribution location, however it is also seen as an emerging mixed use employment area. Located on the A595 to the south east of Workington, Lillyhall is considered to be a strategic industrial area suitable for industrial and commercial use by local and inward investors. Lillyhall is divided into four main quadrants: Lillyhall North, East and West and Lillyhall Business Park. The diversity of the industrial estate is evident from the occupiers in each quadrant
 - **Lillyhall North** is home to Eddie Stobart's transport and warehousing site
 - **Lillyhall Business Park** extends to 23 ha. Lillyhall Business Centre, a 26,000 sq ft office development, has recently been completed near the main business park area and provides 19 office and eight studio units. Occupiers at the business centre include accountants, health safety specialists and public sector agencies. In the vicinity of Lillyhall Business Park, Energus, formerly known as The Nuclear Academy, is currently under construction on a 7.3 ha site. Energus will be a two storey state of the art building, 5,500 sq m of floorspace and includes construction workshops, training and meeting rooms a lecture theatre and a learning resource centre to support hot-desking and distance learning. Cumbria University are also planning to take the first floor of Energus
 - **Lillyhall West** is home to Lakes College, West Cumbria, a number of car showrooms, Cumbria Ambulance Service and a range of other general industrial users
 - **Lillyhall East** is the most traditional industrial area, with a range of industrial uses, including some very low grade uses to the rear of the site. The Alcan plant was also located within Lillyhall East
- **Whitehaven Commercial Park** - is 2 miles east of Whitehaven at Moresby Parks. The site is fully serviced and includes a main estate loop road with entrance points to vacant plots. The site is owned by NWDA who developed two speculative units in 1995 which are occupied and Copeland Borough Council's commercial and contracting services are also located at the site, however the majority of the site remains undeveloped. The site suffers from poor access and visibility, however the proposed Whitehaven Eastern Relief Road would improve the former
- **Derwent Howe/Clay Flatts, Workington** - is a corridor of land, predominantly in employment use on the western edge of Workington. It stretches from Workington Railway Station in the north, either side of the railway line and Solway Road (A597) to the junction with Mossbay Road (B5296) in the south. The area includes the (former) Corus steelworks, Clay Flatts Industrial Estate and Derwent Howe Industrial Estate and some non-employment uses most notably the Derwent Howe Retail Park. There is a wide range of occupiers in the area such as equipment hire, builders' yards/merchants and with some larger format manufacturing and warehouse premises in the Derwent Howe Industrial Estate. There are several vacant plots of land throughout the area. There is a mixture of public and private ownerships across the area. Clay Flatts Industrial Estate is predominantly owned by Northern Trust and managed by Whittle Jones

- **Industrial belt between Workington and Maryport** - a stretch of industrial development runs along the coast between Workington and Maryport. This area includes St Helens Business Park Flimby, St Helens Business Park Siddick and Rise Howe Industrial Estate. St Helens Business Park, Siddick is located to the west of A596 opposite Dunmail Shopping Centre and comprises three freestanding modern warehouses with integral office space. St Helens Business Park, Flimby is located on the west side of the A596 includes large format manufacturing/warehouse occupiers including one of the largest paper mills in Europe and a chemical plant. Rise Howe Industrial Estate has limited frontage to the A596 but extends back from the main road a considerable distance. The estate caters predominantly for low grade local users
- **South of Maryport** - the area of employment land to the south of Maryport includes two main industrial estates either side of Main Road (A596); Glasson and Solway. Glasson Industrial Estate is located to the north west of the A596 is a small dated industrial estate developed in the 1980s comprising of five terraced units. It is owned by Northern Trust and managed by Whittle Jones, their associated management company. Solway Industrial Estate is located to the south east of the A596 and has 45 relatively modern units. Both estates are occupied by predominantly local companies mainly undertaking lower end general industrial activity, however there are plans to raise the quality of provision on Glasson (see pipeline)
- **Lakeland Business Park, Cockermouth** - a good quality business park in a low density environment on the edge of Cockermouth. The park is owned and managed by Ashtenne Space Northwest. Lakeland Business Park provides 33 self contained office within seven detached two storey business units. The seven units total approximately 35,000 sq ft gross internal area. The suites are available on flexible terms accommodation is available at rents of £7 - £10 psf. Good access to the A66 coupled with an attractive environment ensures this is an attractive location for both local occupiers and inward investors. The park is popular with occupiers; examples include NFU Mutual, TC Properties Ltd, Saint & Co accountants and Northern Development Company
- **Derwent Mills, Cockermouth** - a popular industrial estate built in the mid 1980s owned by Northern Trust which provides small to medium sized units. Accommodation is in the form of two detached factory units and three blocks arranged in a courtyard style of eight terraced units which provides industrial accommodation for predominantly local users

3.5 The other employment areas in Allerdale tend to be much smaller and distributed throughout the more rural areas to the north of the borough. The exception being the Dovenby Hall Estate which is situated between Cockermouth and Maryport. This has been developed/refurbished by Northern Developments Ltd on behalf of the owner M-Sport for own use together with some generally available office space.

3.6 The main employment sites in Copeland (in addition to Sellafield) are:

- **Westlakes Science and Technology Park** - this is a large high quality landscaped business park of c.54 ha that has seen continued development since the early 1990s, with a vision to create a knowledge campus of international significance where links between business and higher education would be combined to create employment opportunities, with a specific emphasis on the nuclear and wider energy sector. The headquarters of the

Nuclear Decommissioning Authority is based here and the park is home to a significant number of nuclear related businesses. By 2010 the Park aims to be the major knowledge based employment site in West Cumbria with a target employment level of 1,500 people. There are over 70 organisations/businesses currently resident at Westlakes Science and Technology Park including; Gleeds (surveyors), Jordan Nuclear, Nu-tech Associates Ltd, Cumbria Chamber of Commerce and the University of Central Lancashire. Accommodation is available at rents of £12-£14 psf. Fully serviced development plots are available for immediate development, plot sizes range from 0.5ha to 1.7ha, all plots have outline planning permission for B1 offices and laboratories and B1/B2 manufacturing. A further 17 ha of employment land has been allocated to extend the Park to the north and south

- **Sneckyeat Road Industrial Estate, Whitehaven** - this is a small well established and popular industrial estate located approximately 2 miles south east of Whitehaven, serving predominantly local needs. The estate is owned and managed by Ashtenne Space Northwest. The estate provides small to medium sized industrial units (500-3,000 sq ft) which date from the 1980s and 1990s, gross internal floorspace totals approximately 45,000 sq ft. The units at this location have been fitted out to suit tenant's requirements with many units having small offices. Accommodation at this location is for £3.25 for larger units and £5.20 for the smaller units
- **Bridge End Industrial Estate, Egremont** - a popular industrial estate owned and managed by Ashtenne Space Northwest. The estate is located 6 miles south of Whitehaven and has proved to be very popular with the nuclear industry due to its proximity to Sellafield, which is 5 miles to the south. The estate provides a mix of small and medium sized industrial units. Occupiers include James Fisher Nuclear and Graham Engineering Supplies and Equipment
- **Leconfield Industrial Estate, Cleator Moor** - a mixed industrial estate predominately owned by and managed by Ashtenne Space Northwest, located 4 miles to the east of Whitehaven. There are 19 units in total which provides over 100,000 sq ft. The estate provides a range of small, medium and large industrial units dating from the 1960s and 1980s. The larger units in particular are difficult to let. Occupiers are predominantly local users undertaking general industrial activities. An area of land to the south east of the estate has been allocated for potential expansion of the business park
- **Devonshire Road Industrial Estate, Millom** - a well established industrial estate built after the closure of the local ironworks and now owned by Space North West and Northern Trust. The estate is situated on the southern outskirts of Millom. It provides a range of small to medium industrial units (700-5,000 sq ft). The gross internal floorspace totals 26,824 sq ft approximately. The Northern Trust owned units are larger and generally well occupied, whilst the smaller Space North West units have high levels of vacancy

- 3.7 There are a number of smaller clusters/sites of employment activity operating in Copeland such as Red Lanning Industrial Estate and Haig Enterprise Park in Whitehaven, Frizington Road Industrial Estate in Frizington, Beckermest Industrial Estate and Greengarth Business Park towards Sellafield³.

³ Greengarth is located within the Lake District National Park and so is excluded from this study

Total Employment Floorspace

- 3.8 Table 3.2 below shows the total amount of commercial floorspace in West Cumbria in 2007. Table 3.3 shows the change over the past five years in compared to Cumbria and the North West.

Table 3.2 Total Commercial Floorspace, 2007 (thousand sq m)

	Allerdale	Copeland	West Cumbria Total	Cumbria
Offices	75	83	158	584
Commercial Offices	44	65	109	407
Other Offices	31	19	50	178
Factories	751	172	923	2,369
Warehouses	316	70	386	1,436

Source: Commercial and Industrial Floorspace and Rateable Value Statistics, Office of National Statistics, 2007

- 3.9 The latest information shows a total of 158,000 sq m of office space in West Cumbria, approximately 70% of which is commercial office space. West Cumbria accounts for 27% of Cumbria's total supply. The total amount of office space increased by 12% (+12,000 sq m) over the past five years. This is a faster rate of growth than in the county (+8%) or region (+4%). However, office space accounts for a smaller total share of all floorspace in West Cumbria (10%) than in Cumbria (12%) and the North West (14%). A significant amount of new commercial office space relates to the construction of Westlakes Science and Technology Park in Copeland.
- 3.10 There is a total of 923,000 sq m of factory floorspace in West Cumbria, approximately 80% of this is in Allerdale. The total amount of factory floorspace increased steadily year on year up until 2006 and then fell back in 2007 to create an overall reduction of 27,000 sq m (3%) over the past five years. The total amount of floorspace in Cumbria increased slightly over this period, but the wider across the region is reduction (-8%) which reflects a general pattern of decline in manufacturing and growth in service sector industries.
- 3.11 The total amount of warehouse space in West Cumbria is 386,000 sq m, similarly to factory space the majority (80%) is located in Allerdale. Since 2003 there has a slight increase (2%, 7,000 sq m) in warehouse space.

Table 3.3 West Cumbria 2003-2007 (thousand sq m)

	2003	2004	2005	2006	2007	Change	% change
West Cumbria							
Offices	141	140	144	147	158	17	12%
Commercial	96	95	96	99	109	13	14%
Other	45	45	47	48	50	5	11%
Factories	950	943	1008	1061	923	-27	-3%
Warehouses	379	377	390	394	386	7	2%
Cumbria							
Offices	541	544	549	568	584	43	8%
Commercial	364	367	376	395	407	4	12%
Other	178	178	173	173	178	0	0%
Factories	2337	2,355	2,470	2,445	2,369	32	1%
Warehouses	1300	1,342	1,389	1,424	1,436	136	10%
North West							
Offices	11,017	11,236	11,060	11,322	11,508	491	4%
Commercial	8,661	8,841	8,861	9,091	9,255	594	7%

	2003	2004	2005	2006	2007	Change	% change
Other	2,356	2,395	2,199	2,231	2,253	-103	-4%
Factories	35,545	34,726	34,205	33,551	32,615	-2,930	-8%
Warehouses	23,559	23,857	23,660	24,276	24,604	1,045	4%

Source: Commercial and Industrial Floorspace and Rateable Value Statistics, Office of National Statistics, 2003-07

Loss of employment sites to other uses

- 3.12 The table below identifies four sites in West Cumbria where the closure of an existing business has resulted in the loss of land in active employment use. These sites total 87 ha.

Table 3.4 Loss of employment land

Site	Description	Area employment land lost/at risk
Allerdale		
Former Corus site	Emerging proposals for mixed use development on the site (22ha in total) would retain part for employment uses (c. 3ha).	19 ha
Former Alcan site	The closure of the Alcan plant at Lillyhall has generated interest to date for housing or retail uses. However, given the overall character of Lillyhall and its importance in providing local employment opportunities, Allerdale Borough Council are keen to retain it in employment use.	15 ha
Copeland		
Former Sekers site	Agents assert that no commercial enquiries have been received for the site over the past 18 months however the site has attracted interest from residential developer.	2 ha
Former Rodia Chemical works (also known as Marchon)	Site has contracted and workforce gradually reduced until operation finally closed in 2005. At its peak the site employed c.2,500 staff. Redevelopment proposals will see majority of the former plant area (51ha) reclaimed for public open space and an area to the north (c.4.5ha) retained for employment use.	51 ha
West Cumbria Total		87 ha

Note: Figures rounded to nearest hectare

- 3.13 The table illustrates that there is pressure for non-employment uses on these sites and thus emphasises the need for a strategic approach to considering redevelopment of such sites.

Messages from Consultations about supply

- 3.14 **Overall supply:** Commercial property agents believe that overall in general terms there is ample supply to meet demand at a range of rents and locations which is capable of meeting most if not all potential occupiers' needs. Agents consider that there is adequate good quality office supply in locations such as Westlakes Science & Technology Park, Dovenby Hall and Lakeland Business Centre. They also perceive there to be a good quality industrial supply.
- 3.15 However this view is based upon current requirements, rather than requirements which may be generated through economic regeneration and as such other stakeholders, both public and private, do not agree. Such stakeholders perceive a general lack of quality of supply in all sectors. They also perceive that values restrict the level of quality which can be achieved without gap funding.

- 3.16 **Town Centre:** Stakeholders raise issues about the quality of general office supply, particularly given the sector focus of Westlakes Science and Technology Park (nuclear). In particular the town centres throughout West Cumbria tend to lack new/high quality office accommodation. This is directly related to both low levels of demand and viability issues. When better quality space has been built out of town this has been taken up; for example, HMRC have relocated from Whitehaven town centre to Lillyhall. A key consideration is whether key occupiers be retained within the town centres, which are arguably more sustainable locations, if the quality of supply was available. The quality of the offer is critical to its market attractiveness - consultees stated that quality space in town centres tends to stick on the market when it becomes available.
- 3.17 **Nuclear Sectors:** There are concerns whether the right mix/type of accommodation is available to meet current and future requirements. However it is extremely difficult to interpret the exact nature and scale of the sector's requirements. As such there is a risk attached to trying to second guess what the sector's needs may be and this risk maybe perceived as too high, especially to the private sector. The low values in West Cumbria simply add to this risk.
- 3.18 **Rural Sectors:** There is a view that the acquisition of the NWDA portfolio by Space North West (SNW) has impacted negatively on 'real' availability in marginal rural locations. SNW has increased rents and restructured lease agreements to reflect market terms which are sometimes beyond the reach of local businesses. The market view is that this clearly shows the viability of some locations, e.g. Bridge End and Seascale, and the non viability of others, e.g. Millom and Leconfield. There is perceived to be a shortage of workshop space in rural areas; some consultees feel that the focus should be on provision of flexible managed workspace (possibly hybrid units) in Key Service Centres. The focus in North Allerdale should be on making what is there work better rather than necessarily additional supply. The only exception to this is Wigton where there is market evidence of demand for additional space. It is considered that this could be delivered speculatively due to the strong local demand in this location. However it is unlikely that such schemes are viable in most other locations.

Current Availability of Employment Premises

- 3.19 The West Cumbria Development Agency has provided information on the availability of office and industrial floorspace from their databases, however there are some gaps in the details of availability. The data is analysed below.

Office Space

- 3.20 Allerdale has 47,260 sq ft of office accommodation currently available according to WCDA. This equate to approximately 6% of supply⁴. Workington has the largest amount of available office accommodation in Allerdale with 29,818 sq ft, this represents nearly two thirds (63%) of Allerdale's available office accommodation. Cockermouth has the second most available office accommodation with 13,500 sq ft (28.56%) of total available office accommodation.
- 3.21 WCDA records show that Copeland has 34,144 sq ft of office accommodation currently available, this equates to 4% of supply³. The WCDA records show availability of 30,000 sq ft at Greengarth Business Park, near Seascale which is being targeted specifically at the nuclear sector.

⁴ Using Commercial and Industrial Floorspace figures ONS 2007 (p19)

Table 3.5 Availability of Office Floorspace by Settlement⁵

Location	Area sq ft	WCDA Comment
Allerdale		
Cockermouth	13,500	Includes: ▪ Dovenby Hall Estate
Maryport	966	
Wigton	2,976	
Workington	29,818	Includes: ▪ 8,000 sq ft of building John Peel House requiring fitting out ▪ circa 9,000 sq ft of low quality offices
Allerdale subtotal	47,260	
Copeland		
Greengarth Business Park, Seascale	30,000	Targeted specifically at the Nuclear market
Westlakes Science and Technology Park	1,652	Delays being encountered on developments in pipeline
Whitehaven	No figure available	Primary all low quality offices requiring extensive refurbishment
Copeland subtotal	34,144	
West Cumbria Total	81,404	

Source: West Cumbria Development Agency

Industrial Space

- 3.22 WCDA records show 210,474 sq ft of industrial floorspace currently available in Allerdale. Workington has the largest amount of available industrial accommodation with 183,569 sq ft; this represents 87% of all industrial accommodation available in Allerdale.
- 3.23 Copeland has a total of 196,514 sq ft of industrial floorspace available. Cleator Moor accounts for a large proportion (78%). Whitehaven has a relatively small amount of industrial accommodation available (c.10,000 sq ft).

Table 3.6 Availability of Industrial Floorspace⁶

Location	Area sq ft	WCDA comments
Allerdale		
Aspatria	2,959	Space NorthWest Units
Fletchertown	1,031	
Keswick	1,500	Former Cumberland Pencil Factory to be developed
Maryport	3,105	
Wigton	18,310	Space NorthWest Units
Workington	183,569	Includes: ▪ 41,000 sq ft of questionable quality ▪ 60,000 sq ft of workspace is currently planned for 2009 (excluding Eatonfield and Rhymer's aspirations)
Allerdale subtotal	210,474	
Copeland		
Cleator Moor	154,115	120,000 sq ft is of questionable quality
Egremont	12,723	
Millom	19,672	Space NorthWest units available (Northern Trusts Units Occupied)
Whitehaven	10,004	7,508 sq ft is of questionable quality
Copeland subtotal	196,514	
West Cumbria Total	406,988	

Source: West Cumbria Development Agency

⁵ Requests have been made to WCDA for further clarification on the details of this information

⁶ Requests have been made to WCDA for further clarification on the details of this information

Pipeline Supply

3.24 Pipeline supply relates to sites and premises either:

- Under construction
- With planning permission, but where development has not yet started
- Proposals (not requiring planning permission, or where a planning application is yet to be submitted)

Under construction

3.25 There is very little development currently under construction in West Cumbria (6.61 hectares in total). Sites at Lillyhall account for two thirds (4.08ha) of those under construction. The construction of a County Council depot and NWDA units at Joseph Noble Road, Lillyhall on a 2.24 hectare site is the only office (B1a) space currently under construction in West Cumbria. This scheme also includes B2 industrial and B8 warehouse space. Approximately one quarter of supply under construction (1.74 hectares) relates to plant/storage facilities within Sellafield. The remaining schemes under construction are small scale developments (with no particular use class identified in Council records).

Table 3.7 Sites/Premises Under Construction

Site	Area/ Floorspace	Use Class	Description
Allerdale			
Lillyhall	1.66ha	B2	Pencil factory*
Lillyhall	2.42ha	B1a, B2, B8	County Council depot and NWDA units
Plot 15 Lower Road ^A	0.35ha	Not specified	-
Land at Derwent Road	0.37ha	Not specified	-
Adj 16 Lowther Road ^A	0.07ha	Not specified	-
Allerdale subtotal	4.87ha		
Copeland			
Sellafield	0.57ha (5,000 sq m)	B2	Product and residue store
Sellafield	0.49ha (12,085 sq m)	B2	Encapsulated residue store
Sellafield	0.21ha (2,075 sq m)	B2	Sludge packaging plant
Sellafield	0.47 ha(4,665 sq m)	B2	Evaporator store
Copeland subtotal	1.74ha		
West Cumbria Total	6.61ha	-	-

Source: Allerdale and Copeland Borough Council

Note: *Now completed. ^A = Not included in list of sites considered in this study

3.26 There is a total of 15.59 ha of land with planning permission, this relates to 26 schemes. Lillyhall accounts for almost 40% (5.97ha) of all planning permissions and Sellafield accounts for almost 20% of (3.03 ha). The majority of the permissions relate to small sites, 14 are on sites smaller than 0.25 ha.

3.27 The only sites with planning permission for office developments (use classes B1a and B1b) are within Sellafield and at Westlakes Science and Technology Park.

- 3.28 Schemes for general industrial (B2) and light industrial (B1c) uses account for the largest share of planning permissions (11 applications, 5.59ha). Two further schemes (Joseph Noble Road, Lillyhall and Derwent Mills) comprise a mix of B1, B2 and B8 uses and these are the most significant in terms of site area.

Table 3.8 Sites with Planning Permission

Site	Area/Floorspace	Use Class	Description
Allerdale			
Station Yard, Silloth	0.16ha	B1c	Light industrial units
Lillyhall	1.08ha	Sui generis	Car dealerships
Lillyhall, Pitwood Road	0.59ha	B1c	Plant/ training centre
Lillyhall	3.53ha	B2	Remainder of pencil factory site
Lillyhall, Joseph Noble Road	0.77ha	B1a, B2, B8	Remainder of site under construction for Council depot and NWDA units
Derwent Mills	1.34ha	B1, B2, B8	Industrial units
Junction A596/Dock Road	0.8ha	B8	Timber merchant (includes some office and retail space)
Leegate Farm House, Blencogo	0.1ha	B1	Mix of residential and office space
Princes Way, Derwent House	1.82ha	B8	Storage
Snape Road, Workington	0.04ha	B1c	Light industrial units
Allerdale subtotal	10.23 ha		
Copeland			
Beckermat Industrial Estate	0.08ha	B2	Workshop
Beckermat Industrial Estate	0.13ha	B2	Storage building
Colourgro Nurseries, Distington	0.11ha	B8	Storage – extension to greenhouse
Birketts Fencing, Rowrah	0.67ha	B2	Storage – compound
Bridge End Industrial Estate, Egremont	0.11ha	B2	Rig Hall and office space
Ullcoats Industrial Estate, Egremont	0.14ha	B2	Two buildings
Former Church, Preston Street, Whitehaven	0.06ha	B8 and/ or B1	-
Slacks, Millom	0.01ha	B2	Extension to existing factory
Westlakes Science and Technology Park, Plot 2B	0.26ha	B1b	Two storey office and associated car parking
Westlakes Science and Technology Park, adj Herdus House	0.76ha	B1a	Office
Sellafield	2.2ha	B1a	Office building
Sellafield	0.09ha	B1a	Office building
Sellafield	0.07ha	B2	Plant extension
Sellafield	0.2ha	B1a	Office building
Sellafield	-	-	Modular building
Sellafield	0.42ha	B1a	Three storey office building
Sellafield	0.05ha	B1a	Two storey modular office building
Copeland subtotal	5.36 ha		
West Cumbria Total	15.59 ha	-	-

Source: Allerdale and Copeland Borough Council

Note: *Now completed. Where the description implies a use class other than that identified in Council records, DTZ have used the use class stated

Proposals

- 3.29 In addition to the schemes identified above information held by the WCDA suggests that a number of locations will have refurbished offices accommodation becoming available during 2009:
- 8,800 sq ft of refurbished office space in Cleator Moor to be available in 2009 (Copeland)
 - 8,000 sq ft office accommodation at John Peel House, Workington (Allerdale)
 - Former Cumberland Pencil factory in Keswick is to be developed (Allerdale)
- 3.30 Consultations have also identified the following schemes at earlier stages of planning:
- **Lillyhall North:** Northern Developments Ltd are working up a scheme on a 10.5 ha site. The proposals are for a mixed use scheme comprising a hotel (budget 50 bed), 881 sq m of offices (9,500 sq ft), 2,936 sq m (31,600 sq ft) of light industrial roadside uses including filling station, motor dealerships and a small A3 unit, a small truck stop and 40 units of student accommodation. The developers are understood to have received strong interest in the hotel and truck stop, and are aware of demand for the office units
 - **Syke Road, Wigton:** Pre-application discussions have taken place regarding possible extension of this site to the south. It is believed that there is interest in speculative development here. There is a planning restriction in that the site is not adopted
 - **Rise How, Flimby:** Pre-application discussions have taken place for housing along the frontage of the site with B1 units to the rear to provide a buffer with bad neighbour uses. The likelihood of this progressing is in doubt from a planning/economic development perspective, given the key role of Risehow in serving the low end of the industrial market
 - **Glasson, Maryport:** Redevelopment of the former BIP factory into 15,000 sq ft managed workspace is due to start on site. This is a publically funded direct development scheme. The Story and Armstrong site has been acquired by NWDA and its future use will be subject to a mini masterplan and feasibility study
 - **Leconfield:** Discussions are underway between Northern Developments Ltd and Space North West regarding potential reconfiguration, redevelopment and refurbishment of industrial premises to create smaller format units which closer match demand
 - **Sekers:** This 2ha site has become available for redevelopment following closure of Sekers operation
 - **Former Rodia Chemical Works (Marchon):** emerging redevelopment proposals for this extensive site (c.50ha) include reclamation to form public open space and employment uses (c.4.5ha)

Implications for West Cumbria Employment Land Review

- 3.31 The following considers the implications of the existing and pipeline supply of employment land and premises for the West Cumbria.

Role of the Main Employment Areas

Within the employment locations reviewed, there is a clear hierarchy of premises on offer in West Cumbria.

- Higher quality office locations, suited to local and inward investors, are located at Westlakes Science and Technology Park, Dovenby Hall Estate and Lakeland Business Park. Lillyhall Business Centre provides good quality small scale offices particularly attractive to younger companies
- Mixed quality industrial/commercial premises can be found at Lillyhall which is West Cumbria's major industrial location and is the preferred location of industrial inward investors
- Local industrial occupiers are provided for at a range of locations, particularly at Glasson in Maryport, Bridge End in Egremont, Sneckyeat Road in Whitehaven, and Leconfield in Cleator Moor. However the quality of these locations is often poor
- Low amenity uses are provided for at Glasson, Rise Howe, Derwent Howe and Lillyhall East
- In the most rural areas reasonable quality, modern units can be found in Wigton in North Allerdale and Devonshire Road, Millom and Cross Lane, Seascale in the South of the area

The closure of businesses has resulted in significant loss of employment and active employment land (notably Rhodia and Marchion). There is a threat of further losses of employment land to alternative uses. It is important that the local authorities take a proactive approach to guiding the redevelopment of such sites to ensure good quality employment sites are not lost.

On the surface there is a range of premises provided in West Cumbria offering units of varying sites at varying rents, including large scale industrial units and small workshop type units and a range of office locations. However a number of gaps in supply have also been identified through consultations:

- A lack of higher quality offices for general users (not nuclear)
- A lack of quality offices in town centres, especially in Workington and Whitehaven
- In rural areas sometimes a lack of focus means that available supply is not maximised. Should the focus be on making what is there work better rather than expansion?
- An over-supply of poor quality, older industrial units throughout the area, and conversely a shortage of modern smaller scale workshop type accommodation, particularly suited to newer businesses

Research has also noted a small scale pipeline supply outside of Sellafield, and particularly a lack of floorspace under construction. The public sector must work closely with the private sector to deliver schemes which are attractive to the market and fill the gaps identified above.

4.0 Qualitative Assessment of Sites

Introduction

- 4.1 This section sets out the emerging findings of the qualitative assessment of sites considered in the West Cumbria Employment Land Review (ELR). The qualitative assessment is considered alongside the quantitative assessment to identify gaps in supply in Section 6.

Methodology

- 4.2 The qualitative review has been undertaken in accordance with best practice identified in Employment Land Review Guidance Note (December 2004) and comprises the following main tasks:
- **Identification of sites:** A list of sites to be considered was identified by the Steering Group. This included 26 sites considered in the West Lakes Renaissance Employment Land and Property Study (2006) plus 33 additional sites. 59 sites were identified in total
 - **Compilation of data and information on sites:** Building on the data gathered during the WLR study, data on employment sites and premises was collated from a variety of sources including Valuation Office, local agents, national and regional databases of commercial property and through consultation with key agencies and Council officers
 - **Site appraisals:** A bespoke site appraisal proforma has been used which reflects the criteria suggested in the Government guidance i.e. 'market attractiveness', 'sustainable development' and 'strategic planning'. An example proforma is attached at Appendix A. The criteria for scoring is outlined on the proforma and has been conducted to be relative to West Cumbria
 - **Qualitative review database:** The data has been collated and assembled in a database to allow manipulation and analysis of the sites

Emerging Findings

- 4.3 The following section sets out the findings of the qualitative review. It categorises the sites into three bands on the basis of their percentage score in terms of:
- Overall percentage scores
 - Market criteria scores
 - Sustainable development criteria scores
 - Strategic planning criteria scores

4.4 The scores have been banded as follows:

Category	Overall % Score
Best performing	70% <
Moderately performing	50-69%
Lower performing	<49%

4.5 This section provides a table listing the sites, a location map and brief commentary of key messages, in relation to the overall score and then on the basis of each criteria.

4.6 The plan show the reference code for each site (also on the tables below), the size of the circle on the plans illustrate the total amount of land available (pipeline, commitments and remaining available supply) and the colour denotes the category.

Overall Scores

4.7 The following table sets out the overall scores for each of the sites considered.

Table 4.1 Overall Scores

Ref	Site Name	Town	LA	Overall % Score
C23	Bus Station and Garage	Whitehaven	Copeland	80%
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	79%
C6	Bridge End Ind Park	Egremont	Copeland	78%
All 2C	Derwent Howe 2/170		Allerdale	75%
C21	Quay Street Car Pk	Whitehaven	Copeland	74%
All 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	74%
All 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	73%
C1	West Lakes S & T Pk		Copeland	73%
All 13	Port of Workington		Allerdale	71%
All 2A	Derwent Howe 2/011		Allerdale	71%
All 5	Lakeland Business Pk	Cockermouth	Allerdale	71%
All 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	70%
C14	Pow Beck	Whitehaven	Copeland	69%
All 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	68%
C28	BT Depot	Whitehaven	Copeland	68%
All 22	Maryport Harbour	Maryport	Allerdale	68%
C3	Sneckyeat Road	Whitehaven	Copeland	68%
All 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	67%
C7	Bridge End Extension	Egremont	Copeland	66%
All 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	66%
C8	Leconfield	Cleator Moor	Copeland	65%
C26	Jacksons Timber Yd	Whitehaven	Copeland	63%
All 6	Derwent Mills	Cockermouth	Allerdale	63%
All 11A	Dock Road 2/124	Workington	Allerdale	63%
All 2B	Derwent Howe 2/152		Allerdale	63%
C24	Albion St (N)	Whitehaven	Copeland	63%
C25	Albion St (S)	Whitehaven	Copeland	63%
C29	Coach Rd	Whitehaven	Copeland	63%
All 12	Oldside	Workington	Allerdale	63%
C5	Haig Enterprise Park	Whitehaven	Copeland	63%
All 21	Syke Road	Wigton	Allerdale	62%

Ref	Site Name	Town	LA	Overall % Score
All 4	Dovenby Hall		Allerdale	62%
All 16	St Helens (opp Dunmail)	Siddick	Allerdale	61%
All 11B	Dock Road 2/154		Allerdale	60%
C30	Rear Main St	Egremont	Copeland	59%
C27	Preston St	Whitehaven	Copeland	58%
All 19	Aspatia Business Pk, Park Road	Aspatia	Allerdale	58%
All 3	Glasson Ind Est	Maryport	Allerdale	57%
C31	Market Square	Cleator Moor	Copeland	56%
C11	Frizington Rd	Frizington	Copeland	55%
All 10	Rise Howe Ind Est	Flimby	Allerdale	55%
C2	Whitehaven Commercial Pk		Copeland	54%
All 23	Silloth Harbour	Silloth	Allerdale	53%
All 7	Low Road	Cockermouth	Allerdale	53%
C10	Cleator Mills	Cleator	Copeland	48%
C4	Red Lonning	Whitehaven	Copeland	48%
C19	Station Yard	Moor Row	Copeland	48%
C15	Devonshire Road (E11)	Millom	Copeland	46%
All 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	45%
C13	Beckermert Industrial Estate		Copeland	45%
C12	Cross Lane	Seascale	Copeland	43%
All 9	St Helens Business Pk	Flimby	Allerdale	43%
C18	Furnace Row	Distington	Copeland	38%
C20	Rowrah Station Yard Ext		Copeland	38%
C16	Mainsgate Road Ext	Millom	Copeland	35%
C9	Leconfield Extension	Cleator Moor	Copeland	32%
C17	Millom Pier	Millom	Copeland	32%
All 17	Moor Rd	Great Clifton	Allerdale	29%

- 12 out of 58 (20%) sites fall within the best performing category, seven in Allerdale and five in Copeland
- Three sites in Whitehaven town centre (bus station and garage, bus depot and Quay Street car park) all fall into the top category. As town centre sites they perform well on sustainability criteria (due to accessibility and brown field status), market criteria (regarding potential viability and indications of market activity/interest) and strategic planning (due to suitability of neighbouring uses and planning context)
- Bridge End Industrial Estate scores well as market viability is demonstrated by the success of the established industrial park, and in terms of strategic planning and sustainability is located on the edge of a market town which is a focus for regeneration activity
- Derwent Howe (ref 2/170) performs well as it is an established employment area therefore has compatible neighbouring uses and benefits from evidence of general market activity, the sites is brownfield and located on the edge of Workington town centre and therefore satisfy many of the strategic planning and sustainable development criteria
- Lillyhall, West Cumbria's major employment location in terms of scale and investment, is split into five sites, three fall into the best performing category and three within the top tier of the middle category. Lillyhall accounts for the largest share of all available employment land overall and in the top category

- Both Lillyhall and Westlakes Science and Technology Park score well overall as the scores for market attractiveness and strategic planning scores are high, despite low scores in relation to sustainability (due to it being predominantly green field, out of town and not easily accessible by non-car modes).
- 32 sites fall within the moderate category
- 14 sites fall within the lowest category
- The sites that score poorly overall include:
 - Sites in Silloth, largely due to their remoteness which limits market interest and makes them unsustainable in transport terms
 - Maryport Harbour and Millom, both are suited to non employment uses, but have significant potential impact on the environment and significant constraints
 - Four sites that have already been de-allocated in the adopted Copeland Local Plan (Rowrah Station Yard, Beckermest, Furness Row and Station Yard Moor Row)



West Cumbria

Overall %

- 70 to 100
- 50 to 70
- 0 to 50

★ Site not scored

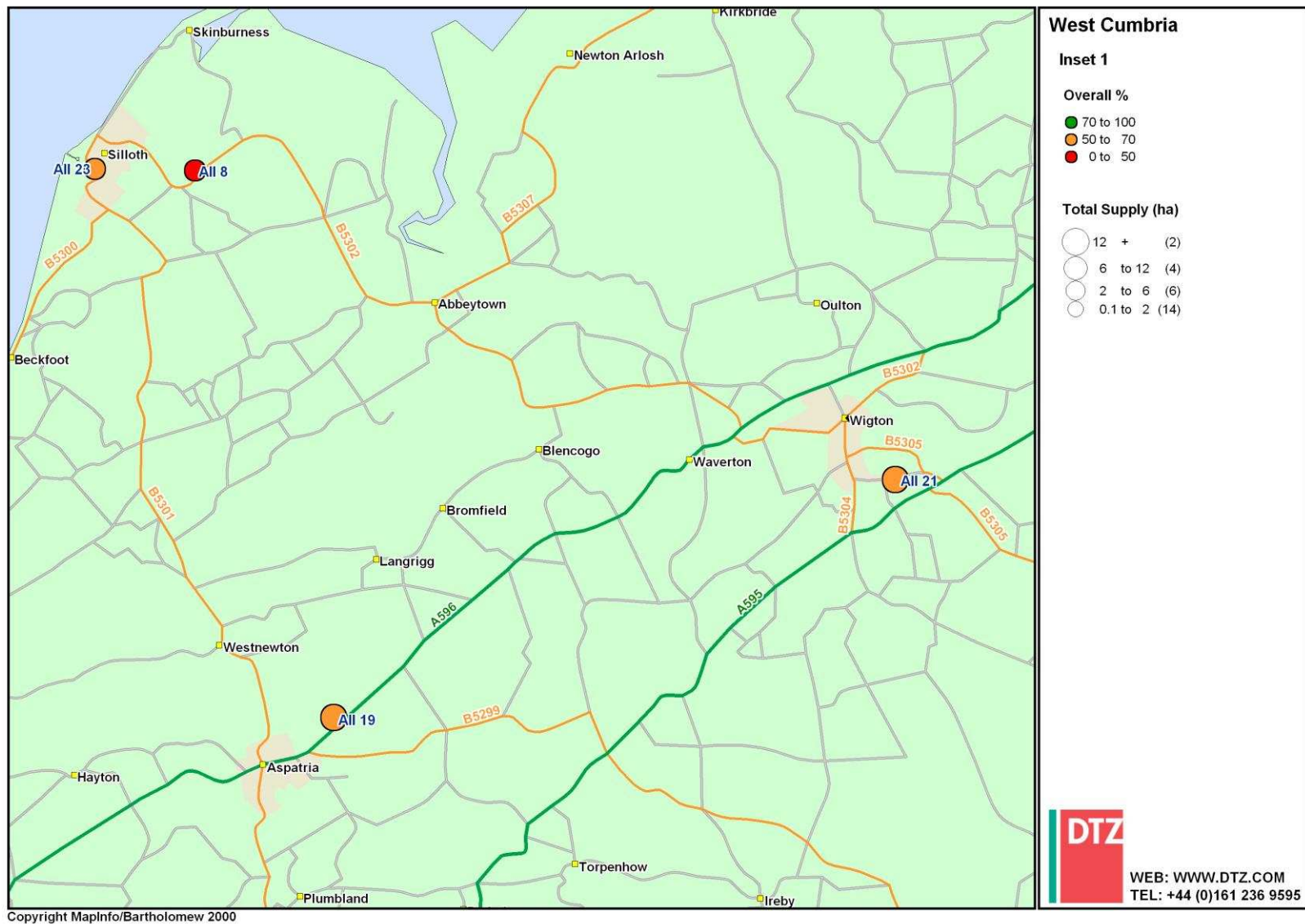
Total Supply (ha)

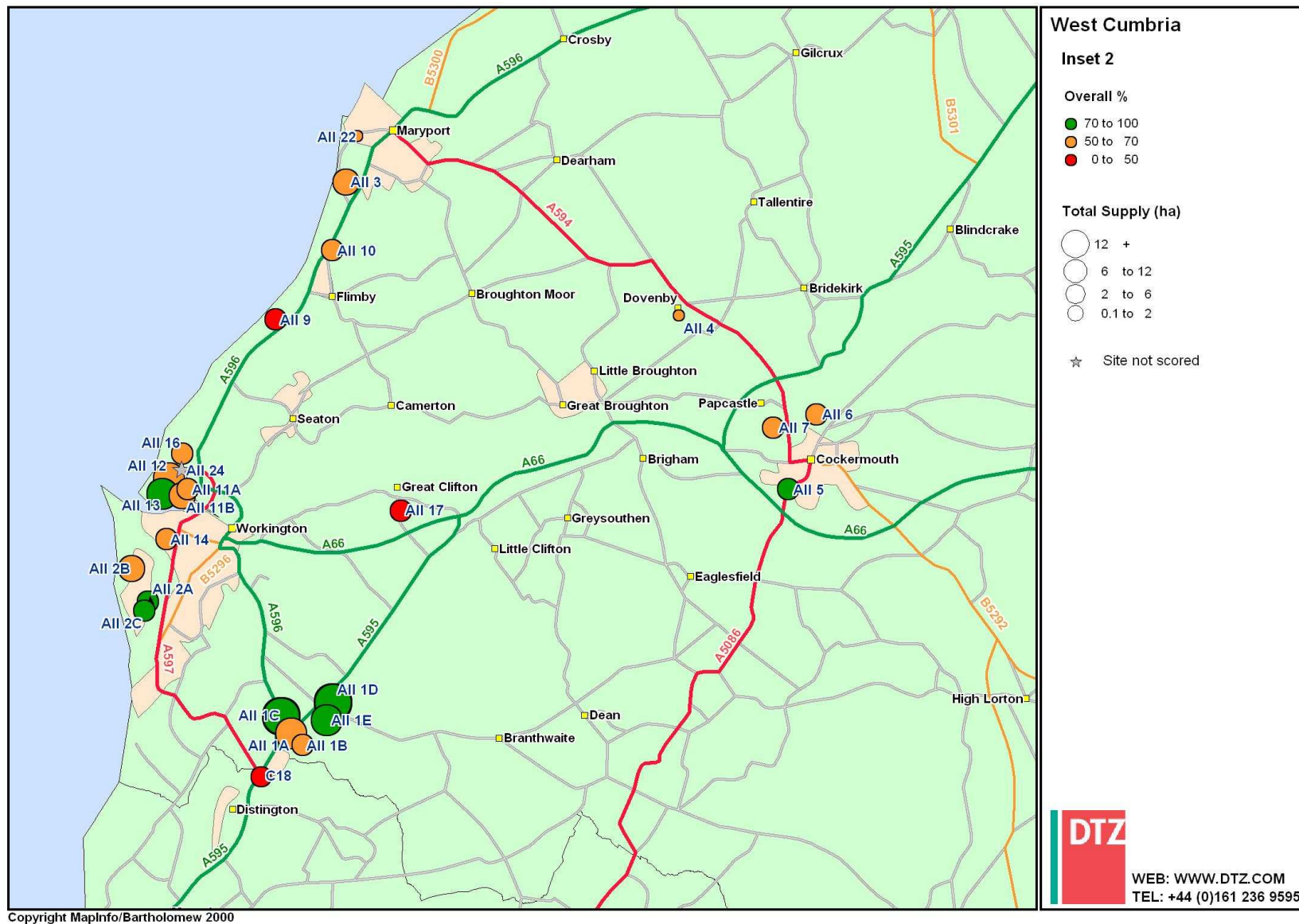
- 12 +
- 6 to 12
- 2 to 6
- 0.1 to 2

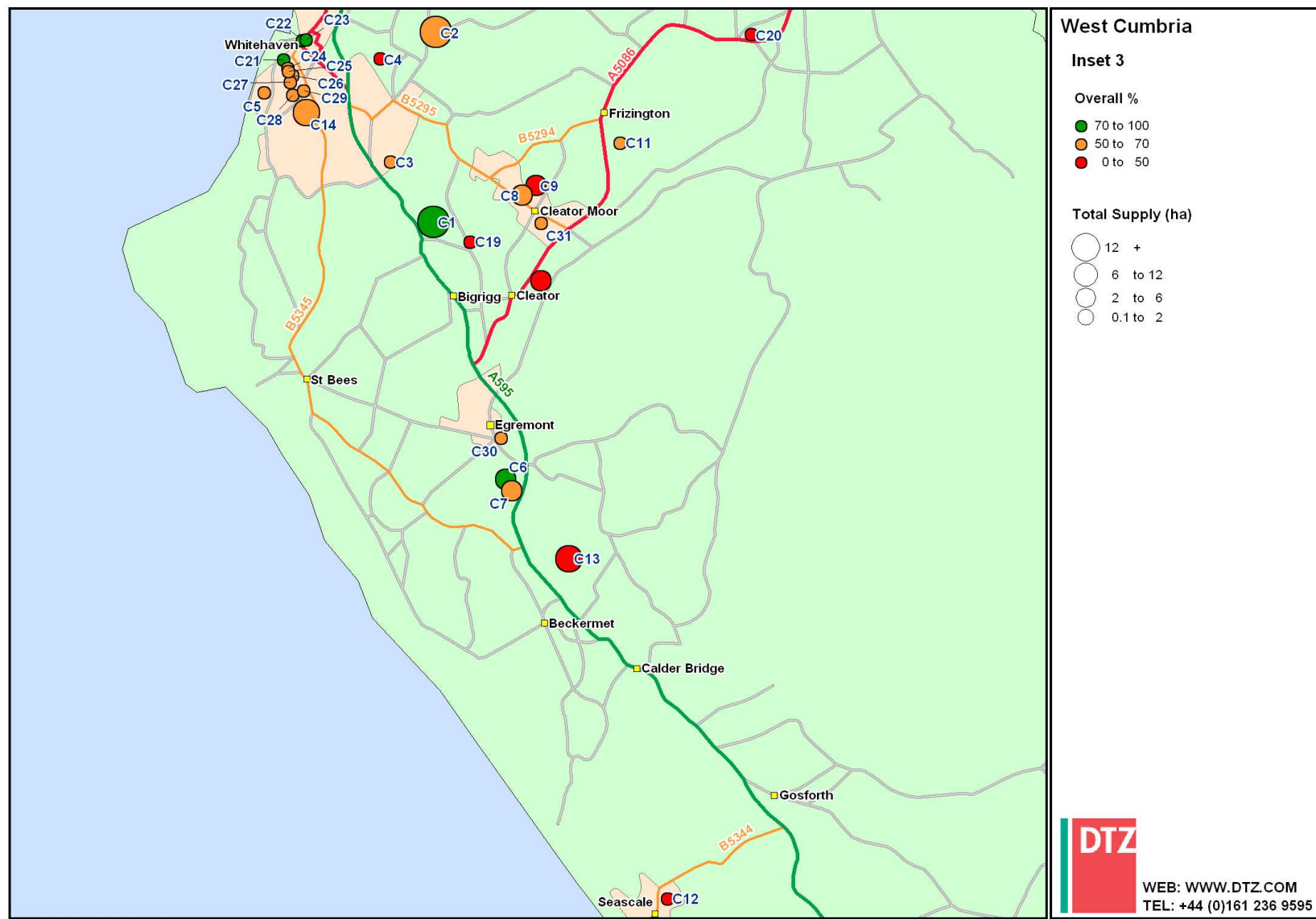


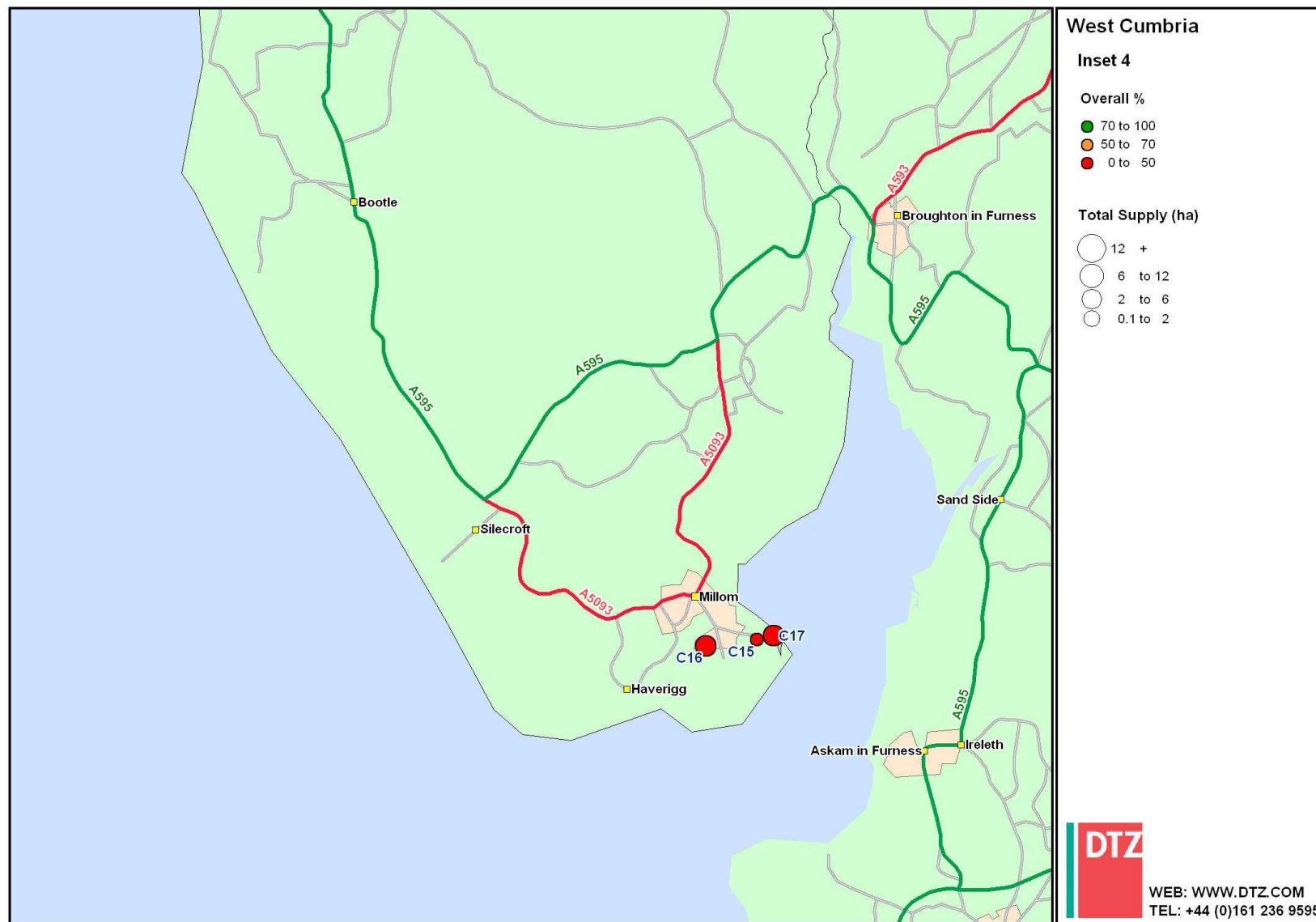
WEB: WWW.DTZ.COM
TEL: +44 (0)161 236 9595

Copyright MapInfo/Bartholomew 2007







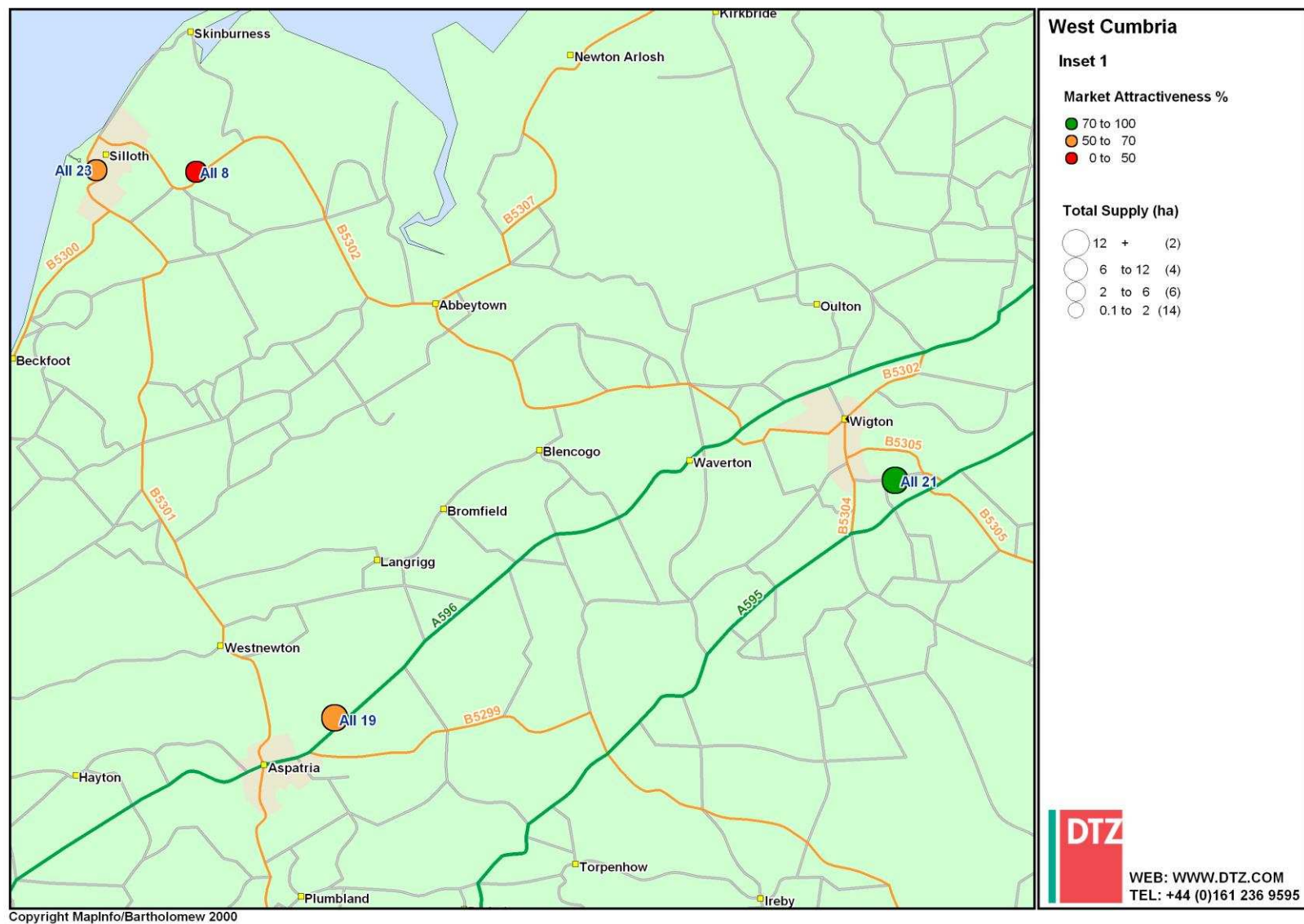


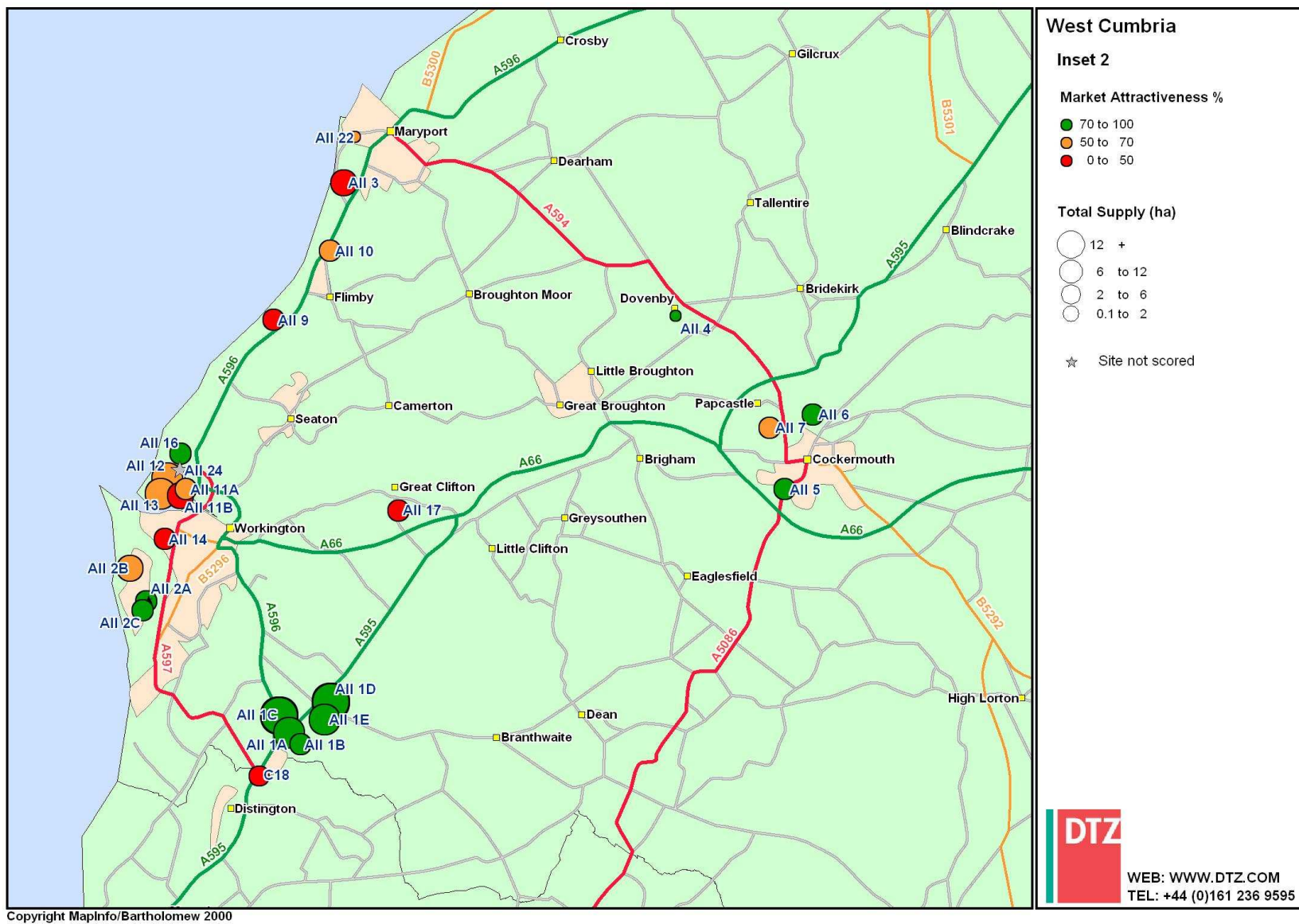
Market Attractiveness

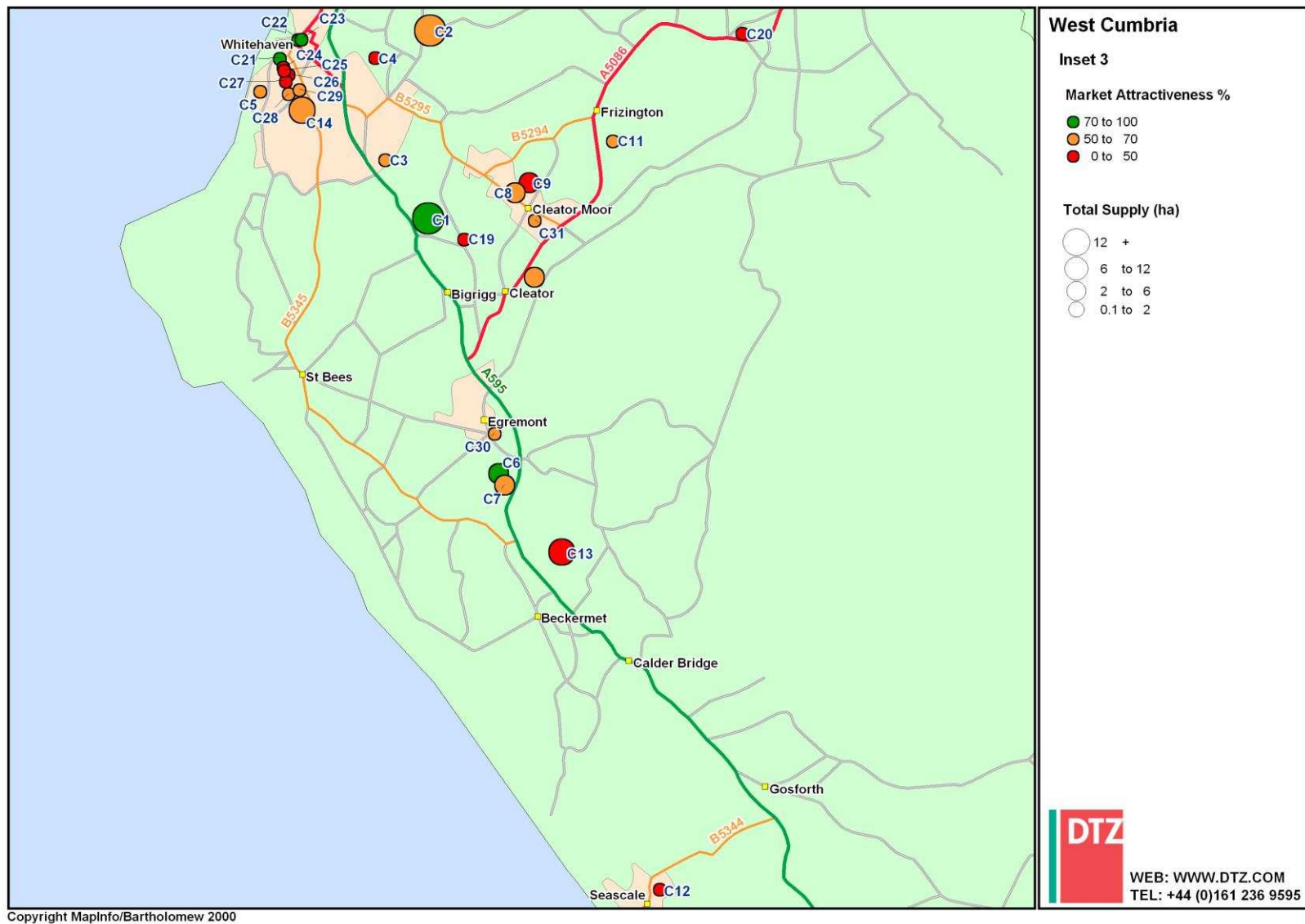
Ref	Site Name	Town	LA	Market Attractiveness % Score
All5	Lakeland Business Pk	Cockermouth	Allerdale	94%
C1	West Lakes S & T Pk		Copeland	84%
All 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	82%
C6	Bridge End Ind Park	Egremont	Copeland	80%
All 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	80%
All 4	Dovenby Hall		Allerdale	78%
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	74%
All 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	74%
All 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	74%
All 6	Derwent Mills	Cockermouth	Allerdale	74%
All 2C	Derwent Howe 2/170		Allerdale	72%
C21	Quay Street Car Pk	Whitehaven	Copeland	72%
All 16	St Helens (opp Dunmail)	Siddick	Allerdale	72%
C23	Bus Station and Garage	Whitehaven	Copeland	70%
All 2A	Derwent Howe 2/011		Allerdale	70%
All 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	70%
All 21	Syke Road	Wigton	Allerdale	70%
All 22	Maryport Harbour	Maryport	Allerdale	68%
C3	Sneckyeat Road	Whitehaven	Copeland	68%
All 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	66%
C7	Bridge End Extension	Egremont	Copeland	62%
All 2B	Derwent Howe 2/152		Allerdale	60%
C29	Coach Rd	Whitehaven	Copeland	60%
C5	Haig Enterprise Park	Whitehaven	Copeland	60%
C8	Leconfield	Cleator Moor	Copeland	58%
C11	Frizington Rd	Frizington	Copeland	58%
All 7	Low Road	Cockermouth	Allerdale	58%
C28	BT Depot	Whitehaven	Copeland	56%
C2	Whitehaven Commercial Pk		Copeland	56%
All 12	Oldside	Workington	Allerdale	54%
C31	Market Square	Cleator Moor	Copeland	54%
All 13	Port of Workington		Allerdale	52%
C14	Pow Beck	Whitehaven	Copeland	52%
All 10	Rise Howe Ind Est	Flimby	Allerdale	52%
All 11A	Dock Road 2/124	Workington	Allerdale	50%
C30	Rear Main St	Egremont	Copeland	50%
All 23	Silloth Harbour	Silloth	Allerdale	50%
C10	Cleator Mills	Cleator	Copeland	50%
C19	Station Yard	Moor Row	Copeland	48%
All 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	48%
C13	Beckermest Industrial Estate		Copeland	48%
C12	Cross Lane	Seascale	Copeland	48%
All 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	46%
All 3	Glasson Ind Est	Maryport	Allerdale	46%
C26	Jacksons Timber Yd	Whitehaven	Copeland	44%
C15	Devonshire Road (E11)	Millom	Copeland	44%
C24	Albion St (N)	Whitehaven	Copeland	42%
C25	Albion St (S)	Whitehaven	Copeland	42%
All 11B	Dock Road 2/154		Allerdale	42%
All 9	St Helens Business Pk	Flimby	Allerdale	42%

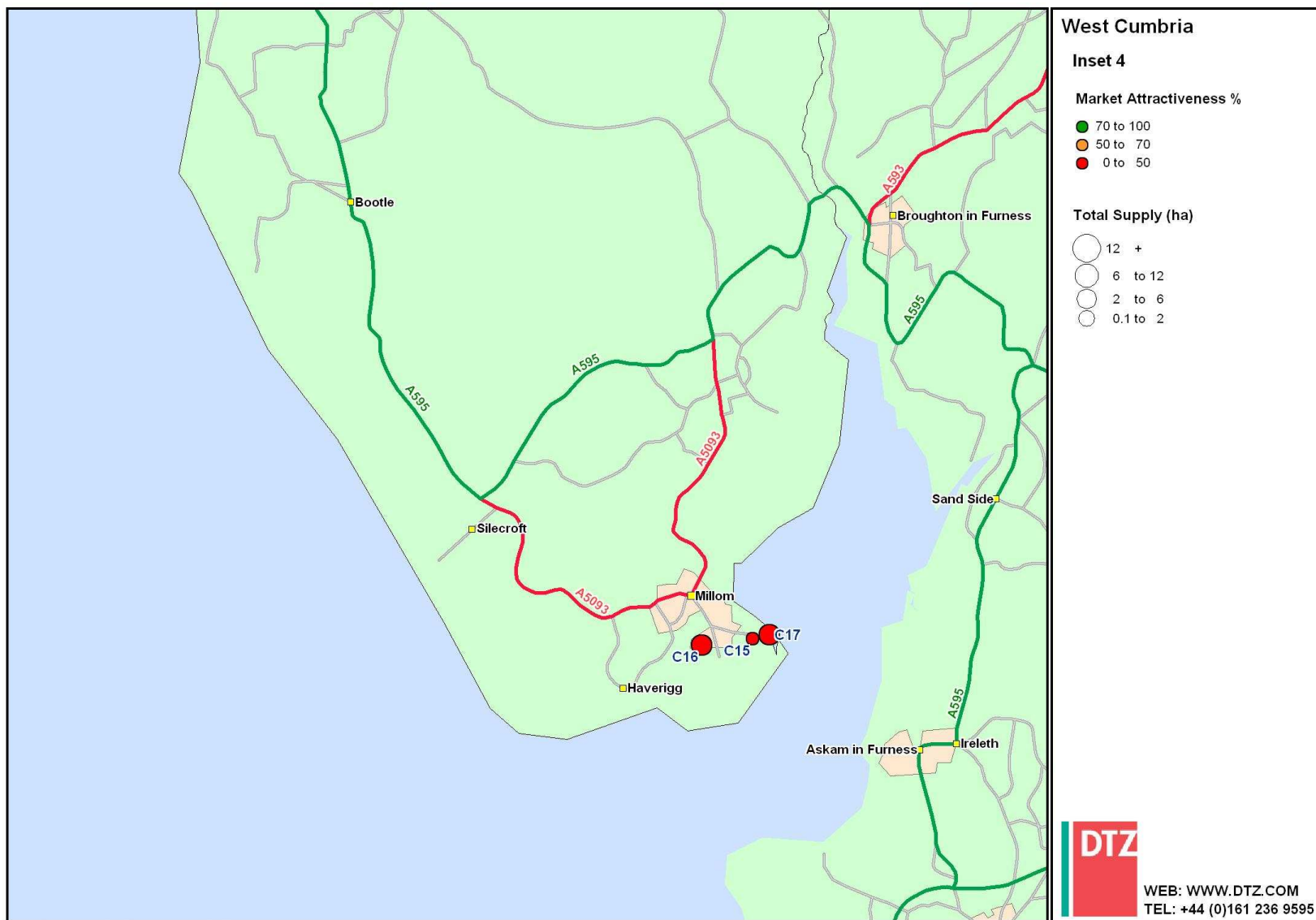
Ref	Site Name	Town	LA	Market Attractiveness % Score
C20	Rowrah Station Yard Ext		Copeland	40%
C4	Red Lonning	Whitehaven	Copeland	38%
C27	Preston St	Whitehaven	Copeland	36%
C18	Furnace Row	Distington	Copeland	36%
C16	Mainsgate Road Ext	Millom	Copeland	34%
All 17	Moor Rd	Great Clifton	Allerdale	30%
C17	Millom Pier	Millom	Copeland	28%
C9	Leconfield Extension	Cleator Moor	Copeland	22%

- 17 sites score in the best performing category
- Lakeland Business Park has the highest score as it is a well established business park at the edge of a town centre (Bridge End scores well for similar reasons)
- All five sites at Lillyhall score in the best performing category largely due to good accessibility and established profile
- Westlakes Science and Technology Park is the highest scoring site in Copeland and the second highest in West Cumbria. This is the focus of West Cumbria's quality office offer
- The market attractiveness of sites falling into the moderate category tends to be limited by low developer interest and the need for investment (with no identified source), despite the ready availability of the site in question
- Those sites that perform poorly tend to have questionable availability and a greater need for investment (although gaps in information affect the overall scoring at present, in particular in relation to ownership)









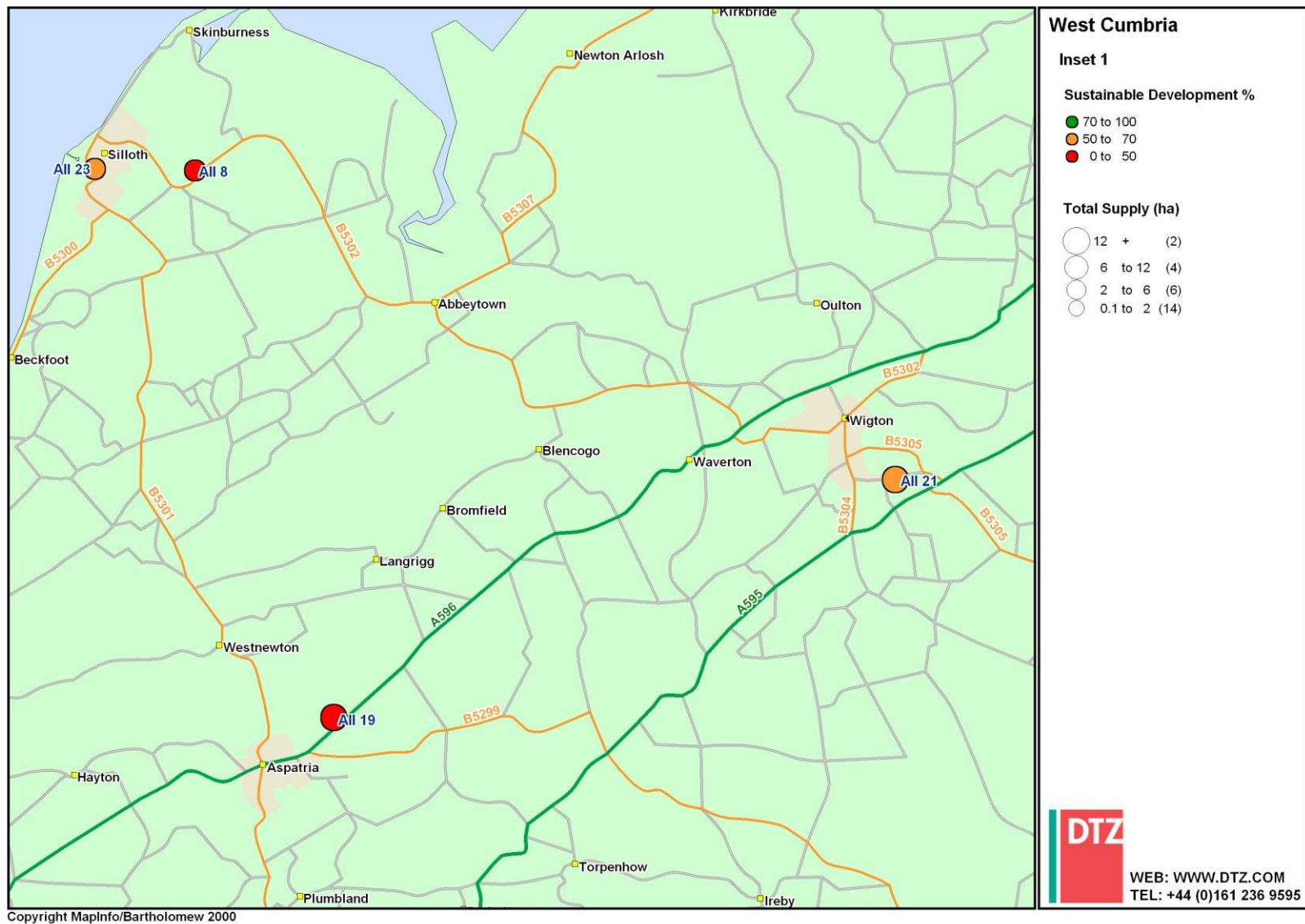
Copyright MapInfo/Bartholomew 2000

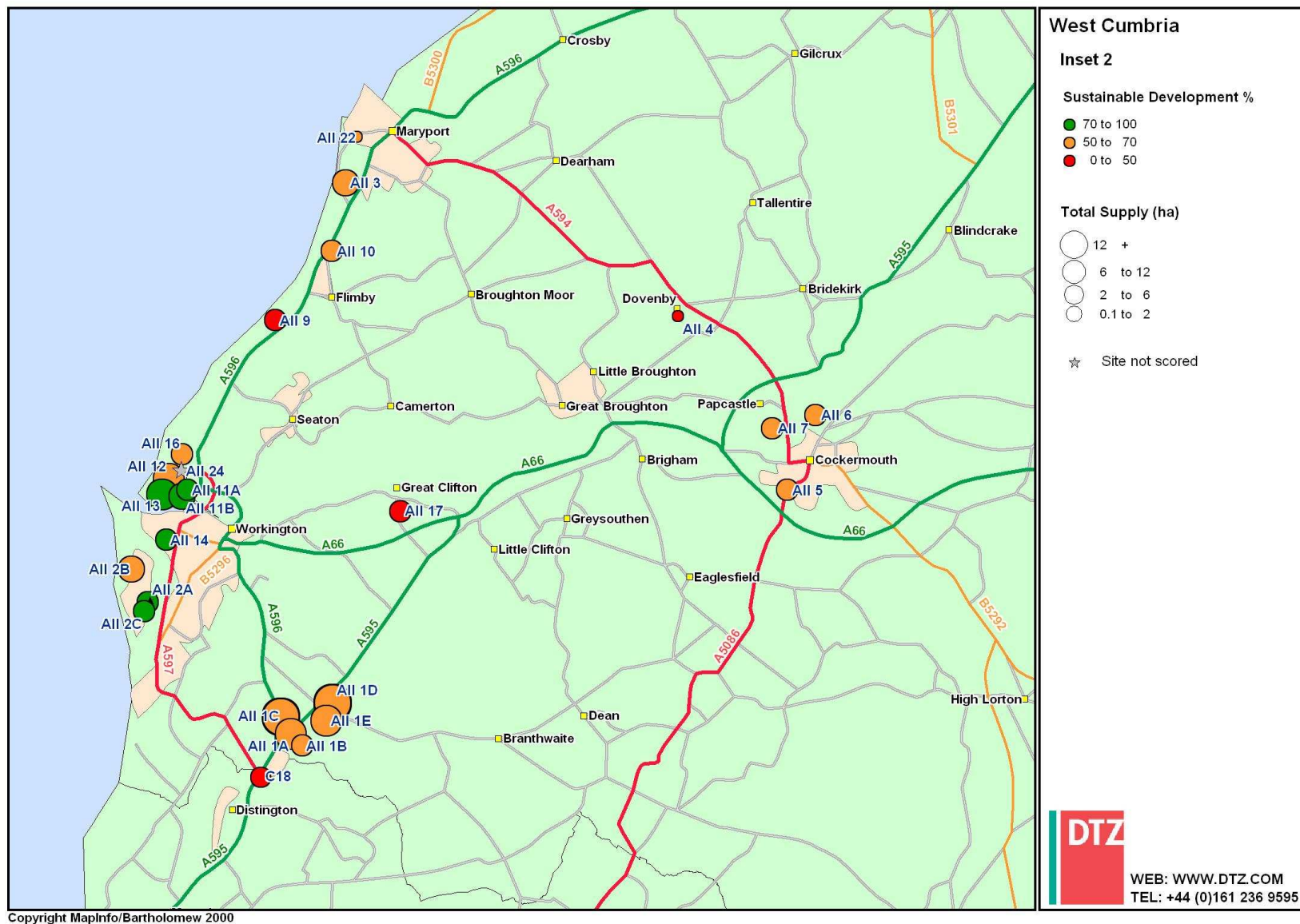
Sustainable Development

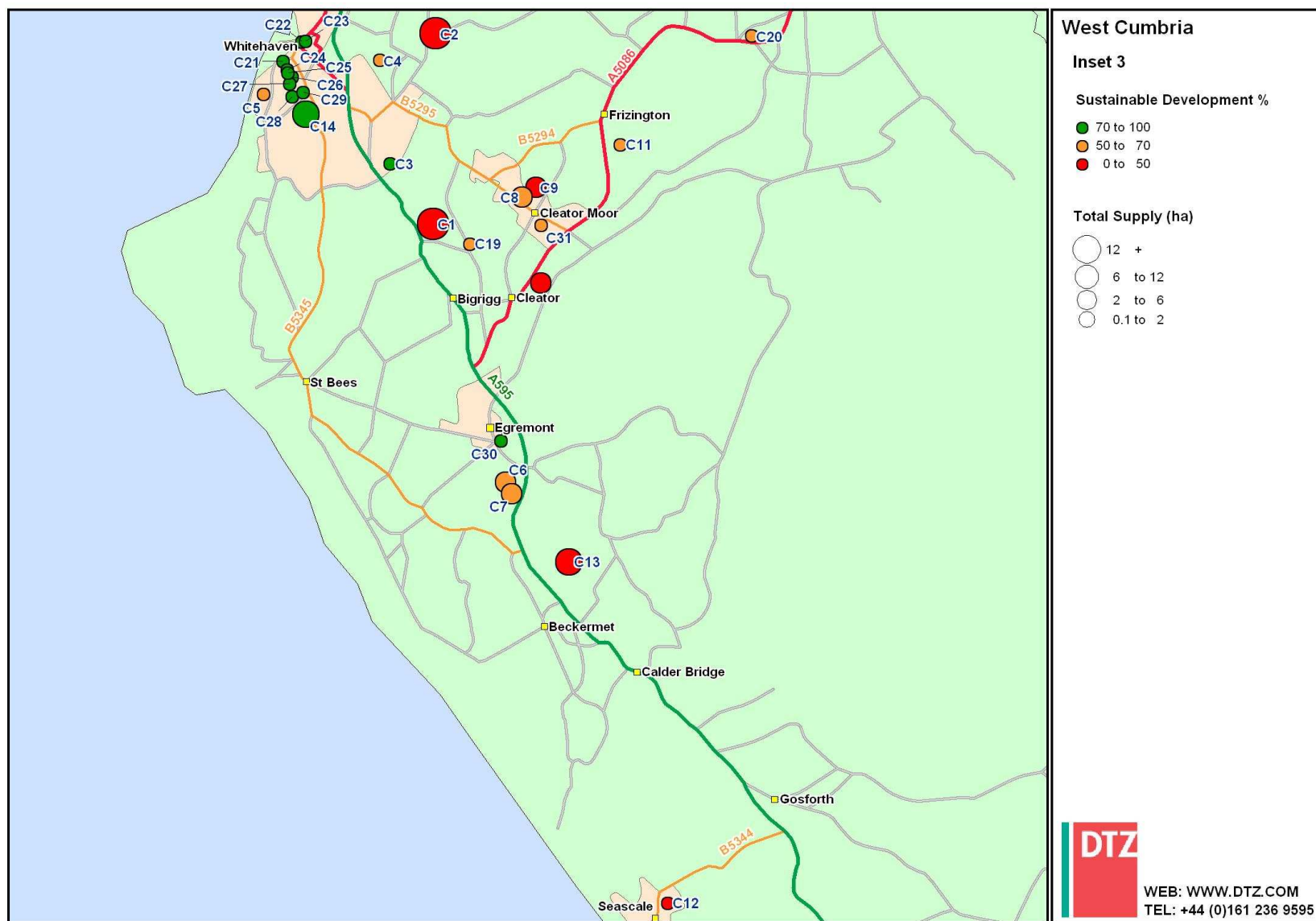
Ref	Site Name	Town	LA	Sustainable Development % Score
C23	Bus Station and Garage	Whitehaven	Copeland	91%
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	89%
All 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	89%
C24	Albion St (N)	Whitehaven	Copeland	89%
C25	Albion St (S)	Whitehaven	Copeland	89%
C21	Quay Street Car Pk	Whitehaven	Copeland	86%
C14	Pow Beck	Whitehaven	Copeland	86%
C3	Sneckyeat Road	Whitehaven	Copeland	83%
All 13	Port of Workington		Allerdale	83%
C26	Jacksons Timber Yd	Whitehaven	Copeland	83%
All 2C	Derwent Howe 2/170		Allerdale	80%
C27	Preston St	Whitehaven	Copeland	80%
C28	BT Depot	Whitehaven	Copeland	77%
All 2A	Derwent Howe 2/011		Allerdale	71%
C29	Coach Rd	Whitehaven	Copeland	71%
All 11A	Dock Road 2/124	Workington	Allerdale	71%
C30	Rear Main St	Egremont	Copeland	71%
All 11B	Dock Road 2/154		Allerdale	71%
C5	Haig Enterprise Park	Whitehaven	Copeland	69%
All 12	Oldside	Workington	Allerdale	69%
All 10	Rise Howe Ind Est	Flimby	Allerdale	69%
All 22	Maryport Harbour	Maryport	Allerdale	66%
C8	Leconfield	Cleator Moor	Copeland	66%
All 7	Low Road	Cockermouth	Allerdale	66%
C31	Market Square	Cleator Moor	Copeland	66%
All 23	Silloth Harbour	Silloth	Allerdale	66%
All 3	Glasson Ind Est	Maryport	Allerdale	66%
All 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	63%
C6	Bridge End Ind Park	Egremont	Copeland	60%
All 16	St Helens (opp Dunmail)	Siddick	Allerdale	60%
C4	Red Lonning	Whitehaven	Copeland	60%
All 5	Lakeland Business Pk	Cockermouth	Allerdale	57%
All 6	Derwent Mills	Cockermouth	Allerdale	57%
All 21	Syke Road	Wigton	Allerdale	57%
All 2B	Derwent Howe 2/152		Allerdale	57%
All 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	54%
All 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	54%
All 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	54%
All 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	54%
C7	Bridge End Extension	Egremont	Copeland	54%
C19	Station Yard	Moor Row	Copeland	54%
C11	Frizington Rd	Frizington	Copeland	51%
C20	Rowrah Station Yard Ext		Copeland	51%
C1	West Lakes S & T Pk		Copeland	49%
All 4	Dovenby Hall		Allerdale	49%
All 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	49%
C10	Cleator Mills	Cleator	Copeland	49%
All 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	49%
C2	Whitehaven Commercial Pk		Copeland	46%
C13	Beckermert Industrial Estate		Copeland	43%

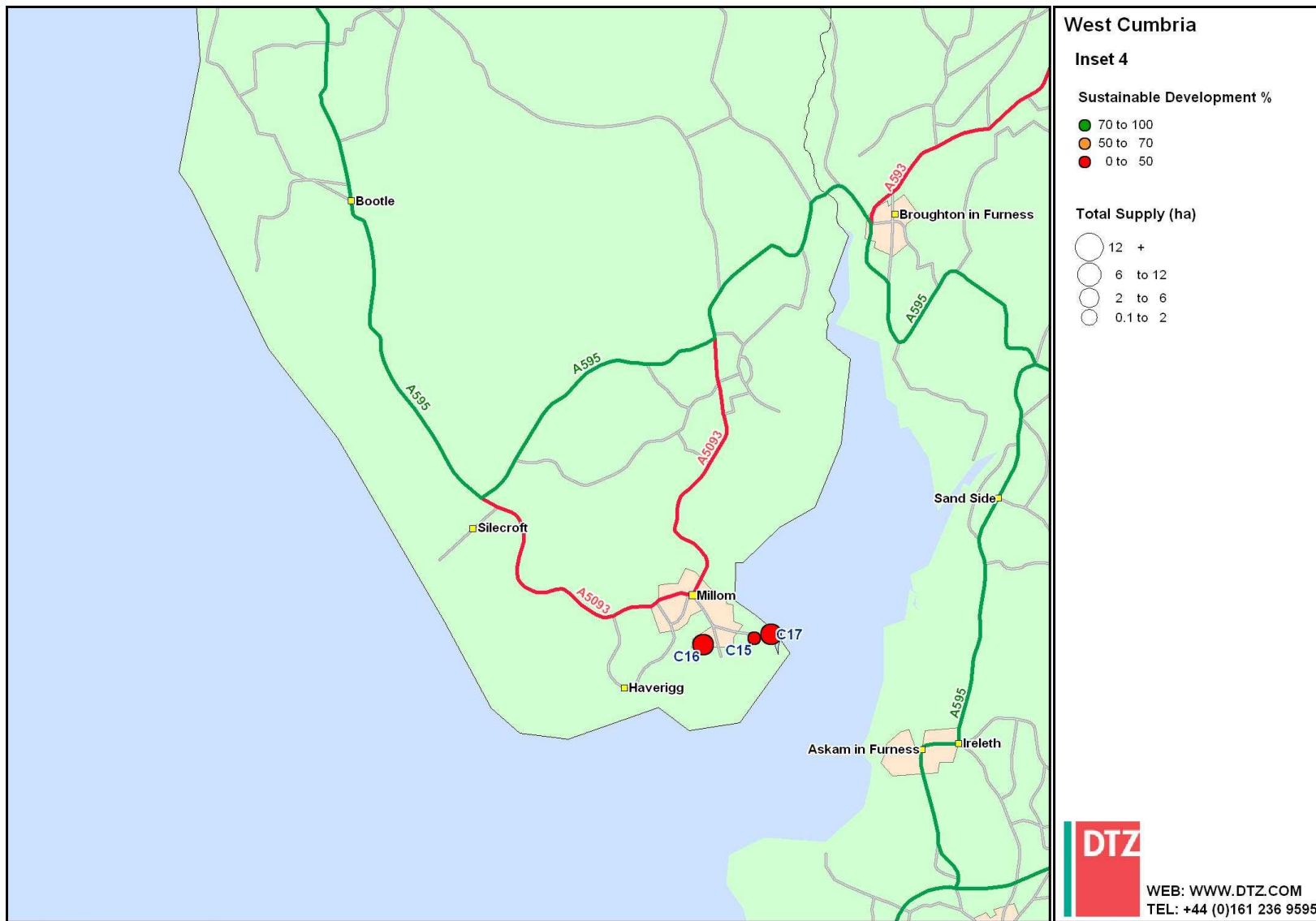
Ref	Site Name	Town	LA	Sustainable Development % Score
All 9	St Helens Business Pk	Flimby	Allerdale	40%
C15	Devonshire Road (E11)	Millom	Copeland	37%
C18	Furnace Row	Distington	Copeland	34%
C9	Leconfield Extension	Cleator Moor	Copeland	34%
C12	Cross Lane	Seascale	Copeland	26%
C16	Mainsgate Road Ext	Millom	Copeland	26%
All 17	Moor Rd	Great Clifton	Allerdale	26%
C17	Millom Pier	Millom	Copeland	26%

- Sites that score well on sustainable development tend to be in or adjacent to the major town centres (i.e. 10 of the 12 best performing sites in Copeland are in the core or periphery of Whitehaven town centre)
- Sites that score in the moderate category have a mixture of characteristics, but tend to be:
 - Near to smaller settlements
 - All or part brownfield so with a limited impact upon the environment
 - Generally suitable for employment use
- Sites which perform poorly tend to be:
 - Not well suited to employment uses due to remote location (e.g. Silloth)
 - Suitable (in part or whole) to other uses (e.g. Cleator Mills)
 - Greenfield (e.g. Furnace Row)
- West Lakes Science and Technology Park and Lillyhall both score poorly on sustainability (49% and 54% respectively) as they are both located out of town location and are predominantly green field. The slight difference in score relates to impact on environment and biodiversity (with West Lakes Science and Technology Park judged to have slightly greater negative visual impact on the landscape). However, as the category threshold is set at 50%, West Lakes Science and Technology Park falls into the lowest performing category whereas Lillyhall falls within the moderately performing category







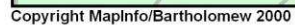


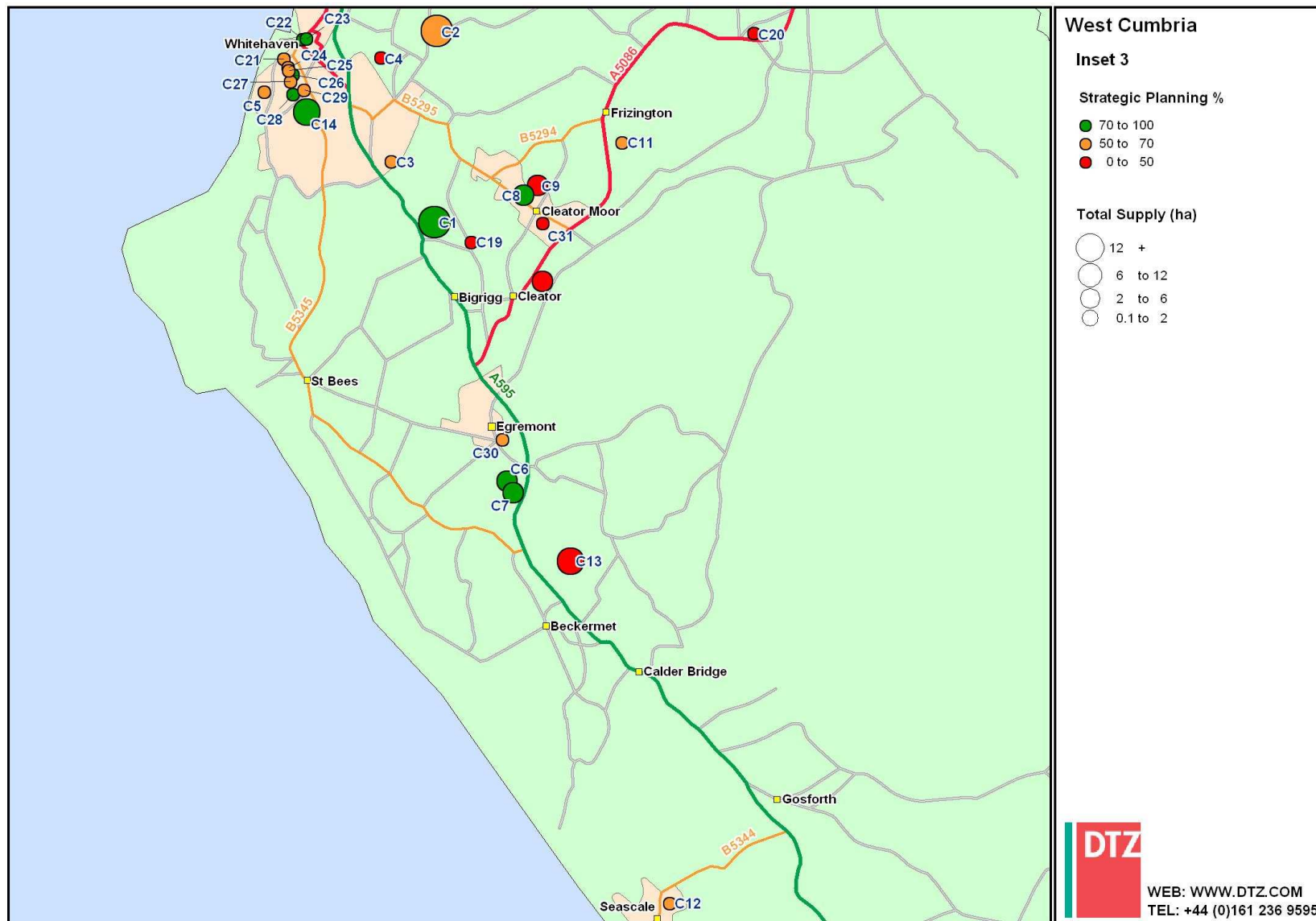
Strategic Planning

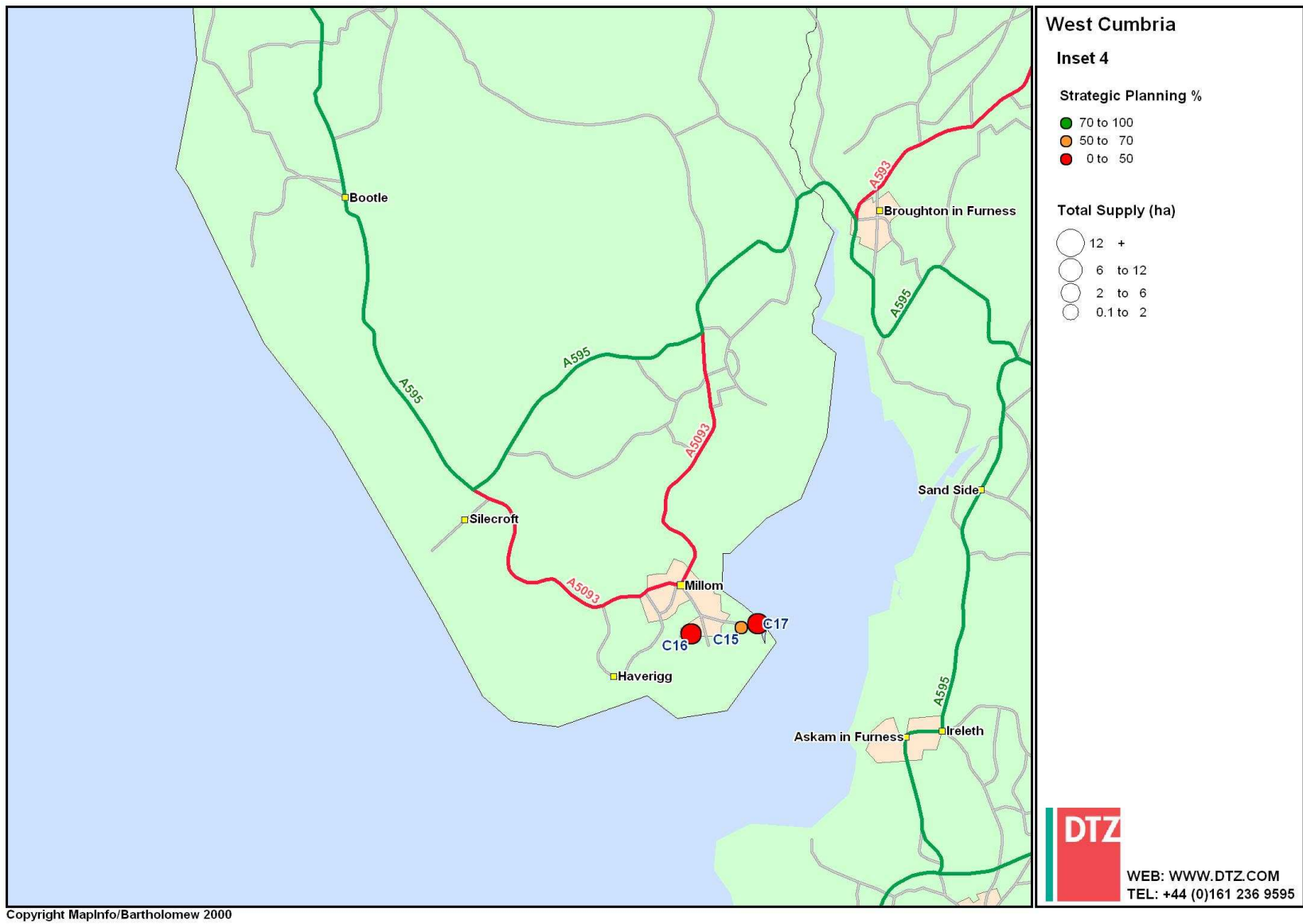
Ref	Site Name	Town	LA	Strategic Planning % Score
C6	Bridge End Ind Park	Egremont	Copeland	91%
All 13	Port of Workington		Allerdale	86%
C23	Bus Station and Garage	Whitehaven	Copeland	83%
All 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	83%
C7	Bridge End Extension	Egremont	Copeland	83%
All 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	80%
All 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	80%
C1	West Lakes S & T Pk		Copeland	80%
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	77%
C14	Pow Beck	Whitehaven	Copeland	77%
All 2C	Derwent Howe 2/170		Allerdale	74%
C28	BT Depot	Whitehaven	Copeland	74%
All 11A	Dock Road 2/124	Workington	Allerdale	74%
All 11B	Dock Road 2/154		Allerdale	74%
C8	Leconfield	Cleator Moor	Copeland	74%
All 2B	Derwent Howe 2/152		Allerdale	74%
All 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	74%
All 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	71%
C26	Jacksons Timber Yd	Whitehaven	Copeland	71%
All 2A	Derwent Howe 2/011		Allerdale	71%
C24	Albion St (N)	Whitehaven	Copeland	69%
C25	Albion St (S)	Whitehaven	Copeland	69%
All 12	Oldside	Workington	Allerdale	69%
All 22	Maryport Harbour	Maryport	Allerdale	69%
C21	Quay Street Car Pk	Whitehaven	Copeland	66%
C27	Preston St	Whitehaven	Copeland	66%
All 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	66%
All 3	Glasson Ind Est	Maryport	Allerdale	63%
C30	Rear Main St	Egremont	Copeland	60%
C5	Haig Enterprise Park	Whitehaven	Copeland	60%
C2	Whitehaven Commercial Pk		Copeland	60%
C29	Coach Rd	Whitehaven	Copeland	57%
C15	Devonshire Road (E11)	Millom	Copeland	57%
All 6	Derwent Mills	Cockermouth	Allerdale	54%
All 21	Syke Road	Wigton	Allerdale	54%
C11	Frizington Rd	Frizington	Copeland	54%
All 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	54%
C12	Cross Lane	Seascale	Copeland	54%
C3	Sneckyeat Road	Whitehaven	Copeland	51%
All5	Lakeland Business Pk	Cockermouth	Allerdale	51%
All 4	Dovenby Hall		Allerdale	51%
C31	Market Square	Cleator Moor	Copeland	49%
C4	Red Lonning	Whitehaven	Copeland	49%
All 9	St Helens Business Pk	Flimby	Allerdale	49%
All 10	Rise Howe Ind Est	Flimby	Allerdale	46%
All 23	Silloth Harbour	Silloth	Allerdale	46%
All 16	St Helens (opp Dunmail)	Siddick	Allerdale	46%
C10	Cleator Mills	Cleator	Copeland	46%
C18	Furnace Row	Distington	Copeland	46%
C16	Mainsgate Road Ext	Millom	Copeland	46%

Ref	Site Name	Town	LA	Strategic Planning % Score
C13	Beckermest Industrial Estate		Copeland	43%
C9	Leconfield Extension	Cleator Moor	Copeland	43%
C17	Millom Pier	Millom	Copeland	43%
C19	Station Yard	Moor Row	Copeland	40%
All 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	37%
All 7	Low Road	Cockermouth	Allerdale	31%
All 17	Moor Rd	Great Clifton	Allerdale	31%
C20	Rowrah Station Yard Ext		Copeland	20%

- Sites which score well tend to be in or adjacent to the main town centres of Workington and Whitehaven (e.g. Bus Station Depot) and/or part of a regeneration initiative (e.g. Pow Beck)
- Westlakes Science and Technology Park scores well due to its suitability to the growth sectors
- Lillyhall scores well due to contribution to economic development, compatible neighbouring uses (as critical mass develops) and the identification of specific users/uses
- Moderately scoring sites tend to have more limited contribution to RSS/RES objectives, but may have more significance in terms of fulfilling a local employment role
- Sites that score poorly tend to have no relevance to the growth sectors, no specific use/user identified (e.g. Low Road) or are linked to non-employment uses (e.g. Rowrah)







Implications for the Employment Land Review

- Many of the sites that score well overall are in or adjacent to the main town centres of Whitehaven and Workington. However these sites are also suited to non-employment uses or mixed use development which may only include a limited amount of employment space. This raises the question of how can these competing uses be balanced
- Sites in rural areas and on the edge of smaller settlements tend not to perform well on sustainability criteria (as they tend to be often greenfield, accessible to only a small population and often only by car). However they may play an important role in the overall sustainable communities agenda by providing opportunities for local employment and reducing the need to travel
- The qualitative review raises a number of questions for stakeholders, in particular:
 - Targeting resources - should investment be focused on improving selected sites, for example those which are at the top end of 'moderately performing' to lift them into the best performing category, or should it be targeted at some less well performing sites which fulfil a specific need (e.g. sites related to the port, or sites which serve a very local rural market)?
 - Benefits of investment - sustainability scores cannot be altered to a significant degree as the criteria relate to factors which are a product of the inherent characteristics of the site. There is more scope to influence some of the market attractiveness and strategic planning criteria
 - Reasons behind scoring - is good performance on market criteria in some instances (i.e. Whitehaven and Lillyhall) a product of limited alternative supply of available large scale sites or quality product?
 - New allocations - should consideration be given to expanding the allocations of sites which perform well overall? This would need to be reconciled with need to reduce overall quantum of supply and achieving a geographical balance of provision across West Cumbria
 - Decallocation - the qualitative review seems to support the decision to de-allocate sites between the Copeland Local Plan 2nd Deposit and adopted Local Plan
 - Roles of sites - which lower scoring sites should be retained to accommodate low grade employment uses?

5.0 Demand for Employment Space

Introduction

- 5.1 This section considers demand for employment space. It sets out the factors influencing demand, including socio-economic context and general market drivers and evidence of levels of demand in West Cumbria.

Socio-Economic Context

- 5.2 The following sets out key socio-economic trends that influence demand for employment space. The section provides information for Allerdale and Copeland local authorities and a sub-total for West Cumbria, which is benchmarked against Cumbria and the North West.

Allerdale

- 5.3 Allerdale is located in the north western part of Cumbria. It covers 1,268 sq km and is the third largest borough in terms of size. Allerdale has a population of 94,300 according to mid-year ONS population data produced in 2006.
- 5.4 Allerdale is predominantly rural in nature, with 56% of its population living in remote rural or other rural areas. The borough is comprised of seven main towns Workington, Cockermouth, Maryport, Keswick, Aspatria, Wigton and Sillloth. Workington is the largest of the towns in Allerdale with a population of 25,000.

Copeland

- 5.5 Copeland is located in the western part of Cumbria and sits between Allerdale and Barrow in Furness. Copeland covers 738 sq km. Copeland has a population of 70,300 according to midyear ONS population data produced in 2006.
- 5.6 The population of Copeland is primarily concentrated in four main urban areas, Whitehaven, Cleator Moor, Egremont and Millom. It is important to note that two thirds of Copeland lies within the rural Lake District National Park. Whitehaven is the largest town in Copeland with a population of 25,000.

Population Change

- 5.7 The following table sets out population change in Allerdale and Copeland, alongside figures for the North West and Cumbria.

Table 5.1 Population Change in Cumbria (000's)

	Population				% Change			
	1991	2001	2006	2016	1991-2001	2001-2006	1991-2006	2006-2016
Allerdale	96.1	93.5	94.3	97.4	-2.7	+0.9	-1.9	3%
Copeland	71.5	69.3	70.3	73.6	-3.1	+1.4	-1.7	5%
Cumbria	486.3	487.8	496.2	520.9	+0.0	+1.7	2.0	5%
North West	6,843.0	6,773.0	6,853.2	7,192.7	-1.0	+1.2	0.2	5%

Source: ONS. 2006 Based Sub National Population Projections (2008)

- 5.8 The population of West Cumbria (Allerdale and Copeland) shows an overall decrease in population between 1991 and 2001. Allerdale's population fell from 96,100 to 93,500 a decrease of 2,600 over the ten year period. Over this same period the population of Cumbria witnessed a small population increase of 500.
- 5.9 The past five years (2001 to 2006) has seen the trend of decline in West Cumbria reversed. Both Allerdale and Copeland both saw moderate increases in population figures, with Allerdale seeing a 1.7% increase (800) and Copeland 1.4% (100). But this has not been sufficient to outweigh the overall loss and the period 1991 to 2006 both Copeland and Allerdale have experienced a decline in population.

Employment

- 5.10 Table 5.2 below shows the proportion of working age economic activity in Allerdale and Copeland compared to the regional and national averages. There is a total of 88,300 economically active residents of working age in West Cumbria. The rate of economically activity in Allerdale (83.9%) is above the regional and national averages, whereas Copeland is slightly below (76.6%).
- 5.11 The majority of the workforce comprises employees (rather than self employed). The rate of self employment is low in Copeland, at 6.8%, compared to 7.9% across the region, 9.4% nationally and 10.6% in Allerdale.

Table 5.2 Economic Activity (working age population)

	Allerdale	%	Copeland	%	North West %	Great Britain %
Total Economically Active	55,600	83.9	32,700	76.6	76.8	78.7
Total Employment Rate	45,200	81.3	31,300	73.6	72.3	74.5
Employees	39,300	70.7	27,600	64.7	63.8	64.7
Self employed	5,900	10.6	2,900	6.8	7.9	9.4

Source: NOMIS Annual Population Survey (April 2007- March 2008)

Employment by Sector

- 5.12 The Cumbria Economic Assessment carried out by BMG Research provides information on Cumbria's Economic position. The following table illustrates employment in West Cumbria by sector compared to Cumbria, the North West and Great Britain.

Table 5.3 Employment by Sector

	Allerdale		Copeland		Cumbria		North West	GB
	Number	%	Number	%	Number	%	%	%
Mining and Quarrying	88	0.3	52	0.2	627	0.3	0.1	0.2
Manufacturing	6,324	18.0	9643	32.9	35,856	16.7	12.6	11.0
Elec Gas and Water	214	0.6	8	0.00	926	0.4	0.3	0.4
Construction	2,587	7.4	1363	4.7	12,673	5.9	5.0	4.8
Wholesale & Retail	6,506	7.4	3,135	10.7	39,360	18.4	17.4	16.9
Hotels & restaurants	4,291	12.2	2027	6.9	24,687	11.5	7.0	6.8
Transport and Communications	1,319	3.8	840	2.9	11,095	5.2	6.1	5.9
Financial Services	341	1.0	174	0.6	2,526	1.2	3.5	3.9

	Allerdale		Copeland		Cumbria		North West	GB
	Number	%	Number	%	Number	%	%	%
Business Services	3,561	10.2	3902	13.3	23,605	11.0	15.8	17.5
Public admin & defence	1,521	4.3	984	3.4	9,037	4.2	5.7	5.6
Education	2,586	7.4	1,917	6.5	17,042	8.0	9.5	9.2
Health & Social Work	3,389	9.7	3,903	13.3	26,399	12.3	12.8	12.3
Other Services	1,702	4.9	916	3.1	10,403	4.9	4.7	5.3
Total	34,429	100	28,865	100	214,327	100	100	100

Source: Annual Business Inquiry 2006

Note: Figures exclude agriculture, forestry and fishing are excluded as they are unreliable in the Annual Business Inquiry

- 5.13 The table shows that Cumbria has a strong manufacturing sector supplying 1 in 6 jobs as opposed to 1 in 11 at a national level. The key factor for this is the impact of the substantial volume employed in Copeland (32.9%) which is predominantly associated with Sellafield. Almost 90% of all jobs in Copeland's manufacturing sector are due to Sellafield. The Cumbria Economic Assessment notes that most of the jobs associated with Sellafield are not strictly manufacturing (i.e. producing tradable goods), but are involved in the decommissioning process. If jobs relating to Sellafield were removed from the equation, Copeland would have the smallest manufacturing sector in Cumbria both (proportionately and numerically), this emphasises the importance of Sellafield to the local economy.
- 5.14 The financial sector is under represented in Allerdale (1.0%) and Copeland (0.6%), as it is in Cumbria (1.2%). The financial sector account for around three times this share of employment across the North West on average. Despite having the usual array of businesses in the sector such as bank and building society branches etc, it does not have the representation of back room functions which are seen in the larger cities throughout the UK.
- 5.15 West Cumbria is also slightly under represented in public administration and defence. Again this is as these sectors tend to be focused in regional centres.
- 5.16 Cumbria has not, historically, had a strong presence in the Higher Education sector. This has a direct impact on the share of all employment the education sector accounts for, but also impacts upon the presence of other higher value sectors. Supporting the growth of the higher education sector is a key policy objective. The main education facilities in West Cumbria are Lakes West Cumbria College and ENERGUS.

Job Density

- 5.17 The following table shows job density for Allerdale and Copeland alongside figures for the North and Great Britain.

Table 5.4 Job Density

	Allerdale (jobs)	Allerdale (density)	Copeland (jobs)	Copeland (density)	NW (density)	GB (density)
Jobs density	43,000	0.76	32,000	0.73	0.85	0.88

Source: NOMIS, ONS Job Density (2006)

- 5.18 The table above shows that there are 0.76 jobs for every resident of working age in Allerdale and 0.73 jobs for every resident of working age in Copeland. Both of these figures are somewhat below the density figures for the North West (0.85) and Great Britain (0.88).

Economically Inactive

- 5.19 The ONS annual population survey states that there are 8,900 economically inactive people in Allerdale and 10,000 in Copeland. The proportion of economic inactivity is particularly high in Copeland (23.4%) compared to Allerdale (16.1%), but is similar to the regional and national averages (23.2% and 21.3% respectively).

Table 5.5 Economic Inactivity (working age population)

	Allerdale	%	Copeland	%	North West %	Great Britain %
Economically Inactive	8,900	16.1	10,000	23.4	23.2	21.3
Wanting a job	2,000	3.6	2,600	6.2	5.4	5.4
Not wanting a job	7,000	12.5	7,400	17.2	17.8	15.9

Source: NOMIS, ONS Annual Population Survey (April 2007 – March 2008)

- 5.20 In Copeland approximately 17% of the economically inactive population do not want a job, compared to 12.5% in Allerdale - this equates to 14,400 people.

Qualifications

- 5.21 The table below sets out the levels of qualifications achieved in Copeland and Allerdale alongside the North West and Great Britain.

Table 5.6 Qualifications

	Allerdale	%	Copeland	%	North West	Great Britain
NVQ4 & above	10,200	18.4	10,700	25.1	25.4	28.6
NVQ3 & above	23,400	42.0	18,800	44.0	44.0	46.4
NVQ2 & above	36,500	65.6	27,300	64.1	64.0	64.5
NVQ1 & above	46,100	82.9	33,000	78.1	78.3	78.1
Other qualifications	-	-	4,000	9.3	6.7	8.8
No qualifications	7,000	12.6	5,400	12.6	15.0	13.1

Nomis: Qualifications (Jan 2007-Dec 2007)

- 5.22 The table shows that overall there is only a small percentage difference in the qualifications levels except in the highest of the qualification categories.
- 5.23 NVQ4 equivalent and above equates to HND, Degree and Higher Degree level qualifications, the table shows that Allerdale and Copeland have over 10,000 people with NVQ4 equivalent, however if we examine the table in terms of percentage of population Allerdale has the lowest of all the geographical areas covered in the table with 18.4% compared to the GB figure of 28.6%

Earnings

- 5.24 The following tables show earnings by residence for both Copeland and Allerdale. The figures in the table illustrate that Copeland workers in Copeland receive £551.60 gross pay per week, whereas Allerdale full time workers receive £429.60 gross per week.
- 5.25 Copeland also get more gross pay per week the North West and Great Britain averages. Allerdale gross weekly earnings compare less favourably and are a little below the North West and Great Britain averages.

Table 5.7 Earnings

Gross Weekly Pay	Copeland	Allerdale	North West	Great Britain
Full time workers	£551.6	£429.6	£432.7	£459.0
Male F T workers	£658.7	£475.5	£479.1	£500.7
Female F T workers	£377.8	£336.5	£369.7	£394.8

Source: NOMIS Earnings by Residence (2007)

Implications for Employment Land Review

- Population change has a direct effect upon the workforce available to businesses in West Cumbria. Both West Cumbrian local authorities experienced a decline in population between 1991-2006. Population forecasts suggest that up to 2016 both Allerdale and Copeland will experience a slight increase in population. The changing composition of the population as a result of ageing society will mean the workforce will shrink as a percentage of all population (however, this is a national phenomenon)
- There is a gap in workforce skills at degree level and a reported shortage of employees with managerial, professional and technical skills. Improving workforce skills and attracting/retaining graduates is essential to supporting economic growth
- Many of the higher skilled and higher paid jobs in West Cumbria are related to the nuclear sector. The prospects of the nuclear industry and the scope to continue to provide high skilled and higher paid employment will have a major impact on overall economy impacting upon the supply chain and reducing the amount of disposal income flowing into other sectors
- Sellafield (and specifically decommissioning activity at Sellafield) has a massive influence on the occupational profile of Copeland but also on Cumbria - producing a skew towards manufacturing. Due to the dominance of Sellafield on total employment and manufacturing activity, the fall in gross added value attributed to the operation has a marked impact on gross added value across Cumbria
- The rate of business formation in Allerdale and Copeland is similar to the Cumbrian, regional and national averages (ranging between 10.4 to 14.3%). Copeland has the highest rate of business formation and again this is likely to be associated with nuclear sector. The increase in stock has an implication for the amount of new business space required within the authority

Property Market Context

National Context

- 5.26 Over the last 6 to 12 months the main driver of the national property market has been the global 'credit crunch'. As a result levels of demand throughout the country have dipped as a result of reduced ability to borrow and increasing costs of finance and business operation. These factors hit developers and investors first, and more recently occupiers.
- 5.27 Recent research shows that property in regeneration areas has proved more vulnerable to the economic slowdown than in other areas. IPD's Regeneration All Property Return fell to -6% in 2007, compared with IPD's broader UK All Property Return, which fell by -3.4% over the same 12 month period. However over the medium to longer term total returns from regeneration areas are still identical to the UK as a whole. At a sector level:
- Total returns for office property in regeneration areas have consistently out-performed the IPD UK average over the last 5 and 10 years
 - Historically industrial property in regeneration areas has offered investors good returns at lower risk; however in 2007 industrial properties in regeneration areas under performed compared to the UK average⁷
- 5.28 Overall the decline appears to be speeding up in all sectors. The under-performance of offices is notable given the recent strength of the office market in recent years, and even in the major office centres of the UK signs of nervousness among developers and occupiers are emerging. As a result rental levels are stabilising and yields are moving out.
- 5.29 It is now generally accepted that the downturn will be with us for some time, with the market not expected to bottom out until late 2009 at the earliest. During these difficult times it is likely that only the best developments in the most attractive locations will succeed.
- 5.30 However, for the purposes of an employment land study which seeks to inform medium term planning, we need to be careful not to over-emphasise the current economic and financial crisis. The West Cumbria Employment Land and Premises Review seeks to identify employment land requirements for the next 15 years. Any 15 year period will encompass around two economic cycles, assuming a cycle is around 7 years, and as such the impact of the current downturn should level out over the plan period. Although the nature of the current crisis is unprecedented in recent times, and it will undoubtedly have a longer term impact on the functioning of the property market in the future.

General Drivers

- 5.31 There are a number of general drivers occurring in the commercial property market which must be taken into account in future planning. These are set out in the paragraphs below.

⁷ IPD, 12 August 2008

- 5.32 **All Sectors:** The primary impact of the ‘credit crunch’ has been to push demand back towards leasehold due to the lack of finance available and to minimise risk; a marked shift from the dominance of freehold only 12 to 18 months ago, especially for smaller businesses. DTZ industrial agents indicate that there has been a shift from 80% of transactions being freehold in the last couple of years, to a majority of leasehold transactions.
- 5.33 Increasing costs of construction are a cause for concern. Costs are rising due to a combination of the volume of construction work, the added burdens caused by Government regulation and the need to improve sustainability. To prevent rental levels rising to uncompetitive levels either land values have to fall or more economic buildings are required (difficult in the context of environmental regulations). BREEAM Excellent is generally the minimum level of expectation of occupiers, and BREEAM Outstanding is talked of (although rental levels may be unaffordable). The impact is even more significant in marginal locations such as West Cumbria where values are so low in the first place.
- 5.34 The abolition of rate relief on empty properties is also likely to impact on speculative development, again with a disproportionate impact in marginal locations. The Government are understood to be revisiting this policy in the light of emerging practical outcomes.
- 5.35 **Offices:** The three primary drivers for almost all office occupiers are:
- Quality of place/environment - increasingly locational decisions are driven by human resource considerations. In a competitive labour market, particularly for office occupiers, businesses want to locate in vibrant and attractive office locations which are easily accessible by public and private transport and provide cultural and leisure facilities for staff
 - Availability of space - most occupiers are opportunistic, they will go where the right space is available at the right time - first choice will be within their existing location (to facilitate retention of staff) and then places nearby or with similar attributes which satisfy staff need
 - Skills - occupiers seek access to a large, well skilled and often highly qualified labour force
- 5.36 In recent times the importance of quality of place has meant a shift away from out of town and towards in town locations. A shift initially felt in the UK’s major city centres but now increasingly felt in secondary towns. Secondary towns are attractive to more cost sensitive occupiers in particular. Existing business parks are increasingly repositioning themselves by offering a range of services and facilities on site, for example gym, crèche, small scale retail.
- 5.37 **All Industrial (including Warehousing):** The key drivers of industrial demand are:
- Access to markets
 - Access to labour
 - Cost of labour
 - Site/building availability

- 5.38 **Industrial/Manufacturing:** Overall the national message is that large-scale manufacturing is decreasing and there has been a move, over recent years, away from traditional manufacturing and towards higher value added research and development and hi-tech production. As a result, occupiers now are increasingly looking for smaller industrial or hybrid units with up to 50% office content, suitable for research and development activities or hi-tech uses in the fields of computing, electronics or pharmaceuticals.
- 5.39 However, although the development of high tech production is an important one, it will not replace the loss of traditional large-scale manufacturing in terms of jobs or floorspace. Furthermore the site and premises needs of higher value manufacturing tend to be very different from those of traditional industries. As a result redundant sites and premises are left behind for which there is little opportunity for refurbishment or redevelopment. This is prevalent in the UKs traditional industrial heartlands, as well as in more peripheral locations which relied on key industries such as ship building and mining. Even where modern production activity has been attracted, it tends to be less land-hungry than the traditional industrial use it has replaced.
- 5.40 Flexibility of space and lease terms is also an important requirement for high tech production. Key players providing this type of space, particularly in regeneration areas, include Network Space which specialises in starter units of around 70-230 sq m (750-2,500 sq ft), Priority Sites which provides units of around 185-465 sq m (2,000-5,000 sq ft) and Business Homes providing industrial/hi-tech units of up to 1,395 sq m (15,000 sq ft). Higher tech industry will also require access to a semi skilled and skilled labour force, and prefer to locate on sites with a higher quality image.
- 5.41 **Warehousing/Logistics:** Growth in this sector is expected to gather momentum over the next few years, particularly amongst retailers, manufacturing and logistics companies requiring warehousing space. B8 industries are continuing to grow and are expected to rival B2 industries in terms of employment over the next few years. However, this is a national picture and not necessarily one experienced by some of the country's older and more remote industrial areas, such as West Cumbria, which have not benefited from the growth in distribution.
- 5.42 The recent phase of speculative supersheds looks like it is at an end in the North West. Major schemes have been built in the North West by ProLogis, Gazeley, Gladman and Patrick Properties. Merseyside has seen particularly high levels of speculative activity with The Vault at Liverpool International Business Park, Pioneer Point at Ellesmere Port and Galaxy in Knowsley. However all stand vacant. The supershed market is traditionally design and build and there will still probably be a market for this, but in remote locations such as West Cumbria it is unnecessary to reserve sites for this type of use.

Regional and Sub-Regional Context

- 5.43 The national shift in the nature of industrial activity from traditional manufacturing uses to light industrial or office-based activity and warehousing uses has also been seen in the North West. According to the North West Regional Assembly's Employment Land Study of 2005, there has been a shift of 52% from B2 to B1 employment between 1991 and 2003, a trend that has had implications for the nature of employment land take-up. In particular:

- There has been an increase of between 6% and 8% in the take-up of employment land for B1 and B8 since 2000, but a decline of 6% in the take-up of land for B2
- A significant increase of 38% is anticipated in the requirement for land for B1 and of 24% for B8, whilst a decline of 42% is anticipated in the requirement of land for B2

5.44 In Cumbria, the focus of the property market is Carlisle and the M6 corridor and it is here that most of the demand is attracted. This location has the best accessibility by both road and rail to Scotland, the rest of the North West and the North East making it an attractive location for all sectors. Furthermore the acquisition of Carlisle Airport by Eddie Stobart and the subsequent plans for its expansion into a passenger and freight hub will strengthen its commercial draw. As a result sub-regional policy tends to focus on this area. In this context the focus of major strategic investment in Cumbria is likely to be Carlisle.

West Cumbria

5.45 West Cumbria's relative remoteness and rural character have resulted in a historically weak commercial property market. Most demand is locally generated. The local industrial market has tended to be the strongest sector. The office market is small scale with the largest requirements driven by public sector occupiers. The warehousing and logistics market is limited due to poor transport communications, although there has been some demand particularly focussed on Lillyhall, driven in part by the historic presence of Eddie Stobart here.

5.46 As a result the market tends to have been driven by the public sector, through direct development and the availability of grants and incentives. Low values have rendered speculative development unviable. However in recent years there have been signs of rising values, and some good quality speculative development has been delivered, for example at Westlakes Science and Technology Park. However the market is still highly marginal presenting significant challenges and in the light of the current financial situation and restricted public sector finance.

5.47 The Carlisle Northern Relief Route will improve accessibility to West Cumbria and links to the airport. This is viewed as a positive development by larger local firms. However its impact in improving perceptions beyond Cumbria is likely to be limited. There are a number of other road schemes in the pipeline which will improve access to West Cumbria, however these are yet to receive funding. Without significant improvements to accessibility West Cumbria's property market will remain predominantly local.

Local Drivers

5.48 This section sets out some of the messages and issues which stood out following consultation with stakeholders, businesses and commercial property agents⁸.

5.49 Historically West Cumbria has seen low levels of commercial property demand. Discussions with local property agents indicate that the credit crunch has had a limited impact due to the already low levels. However West Cumbria Development Agency (WCDA) have noted a sharp fall in enquiries (around 30%) this year, although conversion rates remain high.

⁸ Only 1 business responded (out of 6 contacted) and 3 out of 5 agents

- 5.50 Remoteness and poor accessibility impact negatively on demand for employment land and premises in West Cumbria, resulting in it essentially being a locally driven market. This was particularly flagged as an issue for logistics.
- 5.51 Demand for employment premises is driven by smaller local businesses that require premises with maximum flexibility which can provide their business with the ability to grow, change and adapt to ever changing conditions. Demand for managed workspace throughout Cumbria is healthy and all WCDA schemes have high occupancy levels. Demand has been high for sites run/supported by public sector agencies due to incentives offered, low rents and flexible easy-in/easy-out terms. Demand is much lower for units offered at market rents, especially in marginal/remote locations. There is clearly a need for smaller businesses to be supported, particularly in their early days, but a culture shift may be required in terms of the operation of public sector schemes in order to deliver genuinely sustainable businesses.
- 5.52 A number of larger businesses said they were drawn into the area due to inward investment and public support and they have remained at the location. There is a evidence of one-off large scale requirements, but these are in a clear minority.
- 5.53 Demand is constrained by the quality of accommodation available. This is believed to be particularly the case with offices. Lillyhall for example appears to be a highly attractive office location because new offices have been occupied. However consultees suggest that office occupiers would not choose to be located at Lillyhall if quality space was available elsewhere, especially in town centres
- 5.54 Views about the potential of the nuclear sector are mixed. There is a general acceptance that this will generate demand. However there is a lack of understanding about the quantum, quality and nature of demand. There is also uncertainty on when demand will start and will it come through all at once or in a drip feed fashion. At the moment most requirements have been for small scale space, on relatively short leases which have been used to provide a Cumbria address for the purpose of winning contracts. Uncertainty about the length of future nuclear contracts leads to uncertainty about occupational requirements, including lease terms. There is a view that requirements will in fact not be significantly different outside of Sellafield to general office and industrial needs and that the scale will be fairly limited. However key issues are likely to be:
- High quality buildings in keeping with the profile of businesses serving a market where quality and integrity is important (applies to all types of use)
 - Location - close to main transport routes and travel time to main customer client (usually Sellafield or Westlakes Science and Technology Park)
 - Affordability
 - Security
- 5.55 Comment was made that there was a lack of a cultural sector in West Cumbria generally which has a knock on effect to other employment uses, such as tourism and hotels. This is a priority issue in Whitehaven, Maryport and Egremont.

- 5.56 In the light of the proposals to relocate West Cumberland Hospital, health was another sector which was identified as possibly having potential for spin off demand. Specific opportunities were noted if the chosen site is Lillyhall (forming an education/health campus on the Business Park site) and land between Westlakes Science and Technology Park and Whitehaven town centre.
- 5.57 There has been some evidence of competing demands for employment land in recent years, especially from residential developers (prior to the market downturn). However due to long lead in times development has often not happened, and is unlikely now market conditions have once again changed. Residential developers are no longer buying sites or looking for opportunities to purchase land, in many cases all opportunistic work has ceased and consolidation has begun. However it is not to say that sites may again become attractive to the market again in the future.
- 5.58 Maryport was been identified as having good demand for small, scale light, industrial and distribution accommodation - with flexible lease terms. Demand for offices in Maryport is very low; the only viable B1 type development is studio style workspace.

Opportunities for West Cumbria

- 5.59 **The Port of Workington:** In terms of logistics there is a policy and occupier drive towards multi-modal freight. The market for logistics is currently centred on ports, airports and highway intersections. Secondary cities along key transport routes are gaining in importance as locations. More demand in port regions is expected over the medium term and multi-modal locations are becoming increasingly important, as road transport becomes hindered by road pricing, fuel prices and congestion. Locations with access to rail and short sea shipping (which is being heavily promoted by the EU) will become key. The UK Government's 10 Year Transport Plan seeks to increase the amount of freight moved by rail by 80%. There are a number of existing and planned major multi-modal freight schemes in the North West which, if implemented, will meet requirements for many years to come. These include Port Salford, 3MG at Widnes and Parkside Colliery. West Cumbria also has opportunities in this regard with the Port of Workington and scope to link this via heavy rail to some key employment locations. The 10 Year Investment Plan for the Port seeks to capitalise on these opportunities by ensuring the Port has the infrastructure required to meet 21st century demands.
- 5.60 **The Nuclear/Energy Sector:** The Energy Coast masterplan presents a public sector vision for West Cumbria based on environmental technologies, focused on the nuclear sector. At present the market is viewing this cautiously and until this can be translated into outcomes (i.e. occupier take-up) on the ground, this caution is likely to remain. The key to maximising the potential of the masterplan will be to package it up in a way which is meaningful to the market to ensure that the property industry is able to pick up on the opportunities which it offers.
- 5.61 At the moment there remains considerable uncertainty as to what the property implications of nuclear decommissioning and growth in the wider energy sector will be. However interpretation of the Sellafield Lifetime Plan indicates that:
- Future requirements will predominantly be focussed on the office sector. These will include office space for teams involved in managing and designing major construction projects at Sellafield and office space to accommodate support functions currently located on the

Sellafield site (but which could be undertaken at lower cost off site). As yet there is no indications of the likely scale of these opportunities, but in land take terms they are unlikely to be significant. Occupiers require flexible, good quality space which are CAD friendly

- There will be a significant local supply chain related to decommissioning and termination for the medium term e.g. there will be an increased requirement for personal and protective equipment. However unlike construction decommissioning activity has very little off-site requirements and the activities involved are relatively low-tech. The demolition and decommissioning of buildings is likely to generate a large amount of non-contaminated material and there may be potential for an associated recycling plant, e.g. at Lillyhall
- Waste and nuclear materials management is the most technically challenging elements of the work programme at Sellafield. This area presents most scope for new business development and spin out businesses and the most potential for creating high value added businesses. Provision of start-up, incubator and research and development space will be critical. This is likely to be located on-site at Sellafield or at Westlakes Science and Technology Park

5.62 **Home Working⁹:** The number of people working from home doubled between the censuses of 1991 and 2001, and has continued to increase since then. Now slightly more than 40% of businesses in the UK are currently run from home, and more than half in rural areas. There are more people working from home in rural England than the entire employment base of Glasgow and Birmingham combined. We know that small rural towns are the fastest growing settlement type and that these also serve significant roles as service centres. Such locations are benefiting from the in-migration of wealthier, better skilled people. Technological advances have enabled these residents to start or relocate their business or employment in their new community, which also has significant sustainability benefits by reducing travel.

5.63 Increasingly more live/work properties which provide both housing and workspace within one unit are being designed and developed in towns and countryside. Housing associations are one of the key organisations to lead live/work projects., and major associations are known to be seeking future opportunities in rural locations and market towns, as well as in larger conurbations, in the North West. An alternative approach is the provision of 'work hubs' with at least 25 units and communal areas where workers can share facilities. Provision of either kind also benefits from on-site business support services.

5.64 The development of new working practices in rural areas is largely ignored, but not encouraged by the planning system. In some locations a major obstacle to provision has been outmoded planning regulations which often allocate residential and business properties to different zones.

5.65 The challenge for West Cumbria to capitalise on this opportunity will be twofold:

- To ensure that planning policies are in place to enable this type of development in appropriate locations

⁹ Grant,K (2008). "Under One Roof" Inside Housing 18 April 2008 and Lowe, P and Ward, N (2007) Sustainable Development 15, 3-7-317

- To capitalise on wider investment in key service centres to improve their attractiveness as places to live and work

Implications for Employment Land Review

- Medium to long term planning should not be overly affected by the current economic downturn
- Trends in costs and values mean that West Cumbria was and is likely to remain a marginal location and the public sector will have a key role to play in market creation
- Due to its remoteness West Cumbria is predominantly a locally driven market and is likely to remain so, for all sectors
- The potential of the energy sector is an opportunity which must be harnessed. However it needs to be interpreted in a way which is more appropriate to the private sector. This means a clearer translation into sites and premises implications
- West Cumbria has potential to capitalise on the home working phenomenon. However this will require wider improvements to quality of life in its key market towns
- The Port of Workington could potentially be a key driver in the future given the policy and market push towards multi modal freight
- There is a shortfall in quality of employment space in West Cumbria which needs to be addressed, although values will make this challenging
- Future demand is likely to focus on smaller scale, flexible workspaces; there is also an anticipated growth in demand from the office sector

Evidence of Demand: Past Take-Up

5.66 Past take-up provides an indication of levels of demand. Analysis of past trends provides an indication of future demand if past trends continue. Evidence of past demand is presented using the following data:

- Employment land take-up (completions)
- Deals and Transactional evidence
- Enquiries for employment land and premises

5.67 The first provides evidence of developer demand. The latter two provide evidence of occupier demand.

Employment Land Take Up by Type

5.68 The following table shows West Cumbria employment land take up between 2003 and 2008. Total employment land taken up over the period was almost 24 ha. **Average take-up p.a. is 3.96 ha.**

Table 5.8 West Cumbria Employment Land Take up by Type

ALLERDALE	02/03	03/04	04/05	05/06	06/07	07/08	Total	Average
Business Park	0	0	0.20	0	0	0.75	0.95	0.16
Local Employment	0.27	0.11	0.75	0.51	0	1.26	2.90	0.48

Own Use	0	0.04	0	0	0	0	0.04	0.01
Port Related	0	0	0	0	0	0	0	0
Strategic Employment	0	1.45	0	0	0	0.80	2.25	0.38
Allerdale Total	0.27	1.60	0.95	0.51	0.00	2.81	6.14	1.02
COPELAND	02/03	03/04	04/05	05/06	06/07	07/08	Total	Average
Business Park	0	0	10.0	5.38	0	1.06	16.44	2.74
Local Employment	0.22	0	0	0.12	0	0.82	1.16	0.19
Own Use	0	0	0	0	0	0	0	0
Port Related	0	0	0	0	0	0	0	0
Strategic Employment	0.00	0.00	0.00	0	0	0	0	0
Copeland Total	0.22	0.00	10.0	5.50	0.00	1.88	17.60	2.93
WEST CUMBRIA	02/03	03/04	04/05	05/06	06/07	07/08	Total	Average
Business Park	0	0	10.2	5.38	0	1.81	17.39	2.90
Local Employment	0.49	0.11	0.75	0.63	0	2.08	4.06	0.68
Own Use	0	0.04	0	0	0	0	0.04	0.01
Port Related	0	0	0	0	0	0	0	0
Strategic Employment	0	1.45	0	0	0	0.8	2.25	0.38
West Cumbria Total	0.49	1.6	10.95	6.01	0	4.69	23.74	3.96
CUMBRIA	02/03	03/04	04/05	05/06	06/07	07/08	Total	Average
Cumbria Total	13.26	29.35	37.94	23.82	18.57	n/k	122.94	24.6

Source: Cumbria County Council Schedule 7 Developed Land by Sub County Areas & Allerdale and Copeland Borough Councils (categories are CCC categories of land)

- 5.69 Three-quarters of take-up has occurred in Copeland, however this can almost wholly be attributed to development at Westlakes Science and Technology Park (16.4 ha). Westlakes Science and Technology Park is a key attribute for West Cumbria given its nuclear specialism and the fact that it represents a significant proportion of West Cumbria's modern, quality office stock. However to date most development here has been driven through public sector policy and funding rather than strong market demand. Speculative development is now starting to happen at Westlakes Science and Technology Park, indicating growing recognition from the market, as such we can expect the business park to continue to be a key driver of genuine market demand for office space in West Cumbria in the future. However the pace of market led development is likely to be slower.
- 5.70 The only strategic employment completions have been at Lillyhall Business Centre in Allerdale.
- 5.71 In terms of local employment development completions indicate a more active market in Allerdale which accounts for three-quarters of take-up. However this is a large share of an extremely low overall take-up. If the figures for completions at Westlakes Science and Technology Park are removed annual average employment land take-up falls from 3.96 ha to 1.36 ha.
- 5.72 Allerdale Borough Council have provided details of floorspace completed for the last three years (sq m). This equates to an average of 2,264 sq m pa, equivalent to 2,058 sq m per ha (around 22,000 sq ft) indicating relatively low density development.

Table 5.9 Allerdale Employment Development Densities

	05/06	06/07	07/08	Total	Average
sq m	1,773	0	5,019	6,792	2,264
Ha	0.51	0	2.81	3.32	1.1
sq m per ha	3,476	0	1,786	-	2,058

Notes: There is a discrepancy between CCC and ABC figures - ABC did not record any completions in 06/07 but these are included in the 07/08 figure so averages remain the same

- 5.73 Copeland have been able to provide this information for 2007/8 only, when 4,250 sq m were completed on 1.88 ha of land, equivalent to 2,261 sq m per ha. This is slightly higher than Allerdale but still relatively low density, particularly as almost half was office development. The remainder was a boat building facility at Whitehaven North Shore (2,000 sq m) and a small extension to an existing warehouse in Millom (240 sq m).
- 5.74 Given what we know about the actual developments which account for take-up we can make the following assumptions to try and understand developer demand by use type:
- Almost all office (B1a and b) development has been on business park and strategic employment sites. The own use was also office development
 - Most of the development on local employment sites has been industrial (B1c, B2 or B8)
- 5.75 Therefore over the six years from 2002/03 to 2007/8:
- **Office** uses have been built on 19.7ha of land - **3.3 pa**
 - **Industrial** uses have been built on 4.1ha of land - **0.7 ha pa**
- 5.76 This reflects a shift towards office development, driven by a number of factors:
- Public sector drive to restructure the economy
 - Anticipated demand from a changing nuclear sector
 - Low supply of office accommodation in West Cumbria
- 5.77 Table 5.2 shows that West Cumbria only accounts for 19% of employment land take-up in all of Cumbria. The majority of take-up is focused in the East of the county, closer to the M6 corridor. West Cumbria has traditionally had a weak market for employment land, compounded by its physical remoteness. As such the market is predominantly driven by locally generated, low value demand. Successful new developments such as Westlakes Science and Technology Park and Lillyhall have benefited from significant public sector investment.
- 5.78 The following tables show the breakdown of Allerdale's and Copeland's employment land take up by location over a five year period. It demonstrates which locations are most attractive to the market (although it should be borne in mind that much employment development in West Cumbria has been publicly led/supported).

Table 5.10 Employment Land Take up by Location: Allerdale

	0/2/03	03/04	04/05	05/06	06/07	07/08	5 year Total
Cockermouth	0	0	0.20	0	0	0.75	0.95
Maryport	0	0	0.07	0	0	0	0.07
Wigton	0	0.11	0.45	0.35	0	0	0.91
Workington	0	0	0.23	0.19	0	1.26	1.68
Rural Areas	0.27	1.49	0	0	0	0.80	2.56
Total	0.27	1.60	0.95	0.54	0.00	2.81	6.17

Source: Cumbria CC Schedule 12 and Allerdale BC

- 5.79 The vast majority of Allerdale's employment land take-up (41%) has been focused on rural areas. This is due to the fact that Lillyhall is categorised as within a rural area. Lillyhall Business Centre has been a key development, developed by NWDA. There has also been a significant proportion of development in Wigton with the development of the NWDA assisted Syke Road Business Park.
- 5.80 Take-up in Workington has been for predominantly local uses, including schemes at Annie Pit Lane and Derwent Howe Industrial Estate in 2007/08.
- 5.81 Cockermouth accounts for almost 1 ha, largely due to development at Lakeland Business Park (0.75 ha). The Lakeland scheme is private funded, but includes car showrooms as well as offices.

Table 5.11 Employment Land Take up by Location: Copeland

	02/03	03/04	04/05	05/06	06/07	07/08	5 year Total
Whitehaven	0.22	0	0	0	0	0.80	1.02
Millom	0	0	0	0	0	0.02	0.02
Rural Areas	0	0	10.00	5.50	0	1.06	16.56
Total	0.22	0.0	10	5.50	0.00	1.88	17.60

Source: Cumbria CC Schedule 12 and Copeland BC

Notes: 2006/07 data

- 5.82 Copeland has also been dominated by take-up in rural areas (almost solely in rural areas). This is almost all accounted for by development at Westlakes Science and Technology Park. Other small scale completions are at Mainsgate Road, Millom (250 sq m), 2,000 sq m at the Old Dawn Fresh Factory, Whitehaven and Whitehaven North Shore.
- 5.83 Overall employment land take-up indicates that developer demand is extremely low, and where there have been significant completions these have been pump primed by the public sector.

Deals and Transactional Evidence

- 5.84 The following section sets out commercial property transactions which have occurred in West Cumbria over the last three and a half years. The data has been sourced using industry standard property market databases which ensures a robust approach to property market activity.
- 5.85 The table below summarises the transactional activity over the last three years.

Table 5.12 West Cumbria Transactions April 2005 to September 2008

	2005/6	2006/7	2007/8	Apr - Sept 2008	Total	Average
Offices	4,508	350	916	190	5,964	1,704
Industrial & Warehousing	4,374	2,795	2,862	1,979	12,010	3,431
Total	8,882	3,145	3,778	2,169	17,974	5,135

Source: EGi and Focus

- 5.86 Over the three and a half years almost **6,000 sq m (64,000 sq ft) of office floorspace has been transacted, an average of 1,704 sq m pa (18,300 sq ft)**. 75% of this was transacted in 2005/06 with the sale of Christopher Harding House (4,300 sq m, 46,000 sq ft) in Whitehaven. If this is taken out of the equation office transactions fall to 1,633 sq m (17,600 sq ft) or 467 sq m (5,000 sq ft) p.a.

5.87 **Industrial and warehousing activity is much higher with 12,010 sq m (129,300 sq ft) transacted between April 2005 and September 2008, or an average of 3,431 sq m (36,900 sq ft pa).** Levels have been relatively constant over the last three and a half years, but peaked in 2005/6 at 4,374 sq m. In general industrial and warehousing activity is more geographically distributed throughout the two boroughs, but is focused on the key industrial estates.

5.88 Using standard plot ratios we can convert the transactions data into land requirements.

Use	Floorspace pa (sq m)	Plot ratio	Land Requirement pa (ha)
Office	1,704	40%	0.43
Industrial	3,431	40% industrial 35% warehousing	0.9

5.89 The tables below set out the geographical distribution of transactions. The quoted rents and achieved rents have been shown where available, acting as an indicator of demand.

Table 5.13 Office Transactions West Cumbria April 2005 - September 2008

Name	Location	Use	Date	Area sq m (sq ft)	Quoted Rent	Achieved	Terms
2005/06							
Christopher Harding House	Whitehaven	Offices	01/12/05	4,331 (46,618)			Sold
Lorton Street	Cockermouth	B1 Offices	01/11/05	97 (1,044)	£8.46psf		
Duke Street	Whitehaven	B1 Offices	01/05/05	80 (862)			Sold £75,000
Total				4,508 (48,524)			
2006/07							
Brunswick House	Maryport	B1 Offices	01/02/07	255 (2,742)	£6.93psf		
Sutton House	Dovenby	B1 Offices	01/08/06	95 (1,025)	£9.27psf		
Lowther St	Whitehaven	B1 Offices	19/07/06				Sold £575,000 Income £45,200
Lowther St	Whitehaven	B1 Offices	19/07/06				Sold £575,000 Income £45,200
Total				350 (3,767)			
2007/08							
Europe Way	Cockermouth	B1 Offices	03/01/08	63 (680)	£14.26psf		
Europe Way	Cockermouth	B1 Offices	02/01/08	63 (680)	£14.26psf		
Europe Way	Cockermouth	B1 Offices	02/01/08	63 (680)	£14.26psf		
Robinson House	Westlakes Science and Technology Park	B1 Offices	01/11/07	325 (3,500)	£11.25psf	£11.25psf	
Water Street	Wigton	B1 Offices	06/09/07	41 (436)	£12.61psf		
Water Street	Wigton	B1 Offices	06/09/07	31 (330)	£12.61psf		
Europe Way	Cockermouth	B1 Offices	01/05/07	132 (1,420)	£14.08psf		
Europe Way	Cockermouth	B1 Offices	01/05/07	63 (680)	£14.08psf		
Oxford Street	Workington	B1 Offices	01/05/07	135 (1,456)	£6.18psf		
Total				916 (9860)			
2008 (April to Sept)							
Dovenby Hall	Dovenby	Offices	01/08/08	190 (2,045)	£9.50 psf		
Total				190 (2,045)			

- 5.90 Office market deals are spread throughout the two boroughs with concentrations in the following locations: Whitehaven Town Centre and Cockermouth business parks, and one off transactions at Maryport and Westlakes Science and Technology Park. Deals show that where new space has been brought onto the market, for example at Europe Way in Cockermouth and at Westlakes Science and Technology Park, it is taken up. This could suggest that demand is constrained by a lack of supply. Europe Way is a new build development which flanks the Lakeland Business Centre in Cockermouth. All deals were for very small units (reflecting the available supply) - ranging from 63 sq m at Europe Way to 132 sq m. Europe Way is quoting rents at £14.26 psf for units of 680 sq ft, similar to rents quoted at Westlakes Science and Technology Park, although confidentiality surrounding the lease terms shrouds the actual deals achieved.
- 5.91 Demand is predominantly for small units - with the exception of Christopher Harding House all units transacted are below 325 sq m (3,500 sq ft), and the average size transacted is 116 sq m (1,250 sq ft).

Table 5.14 Industrial and Warehousing Transactions West Cumbria April 2005-Sept 2008

Name	Location	Use	Date	Area sq m (sq ft)	Quoted Rent	Achieved	Terms
2005/06							
Solway Trading Est	Maryport	Industrial	05/01/06	1,449 (15,600)		£2.00psf	
Solway Trading Est	Maryport	Industrial	01/09/05	95 (1,023)	£3.30psf	£3.30psf	
Solway Trading Est	Maryport	Industrial	01/08/05	539 (5,802)	£2.41psf		
Glasson Ind Est	Maryport	B1 Light Ind	01/06/05	2,291 (24,662)			Sold £175,000 Income £34,500
Total				4,374 (47,087)			
2006/07							
Solway Trading Est	Maryport	Industrial	30/01/07	232 (2,497)		£2.82psf	
Solway Trading Est	Maryport	Industrial	17/12/06	265 (2,850)	£2.42psf	£2.42psf	
Derwent Howe Ind Est	Workington	Industrial	22/06/06				Sold
Leaconfield Ind Est	Cleator Moor	Warehouse	01/04/06	2,298 (24,737)		£2.22psf	
Total				2,795 (30,085)			
2007/08							
Solway Trading Estate	Maryport	Industrial	29/03/08	82 (885)		£4.41psf	
Solway Trading Estate	Maryport	Industrial	29/03/08	48 (517)		£4.41psf	
Solway Trading Estate	Maryport	Industrial	29/03/08	48 (517)		£4.90psf	
Clay Flatts Industrial Estate	Workington	Industrial	21/03/08	48 (517)		£4.90psf	
Clay Flatts Industrial Estate	Workington	Industrial	21/03/08	221 (2,381)	£4.75psf	£4.75psf	
Salterbeck Trading Estate	Workington	Industrial	01/02/08	483 (5,199)		£3.46psf	
Clay Flatts Industrial Estate	Workington	Industrial	10/01/08	293 (3,150)	£4.75psf	£4.50psf	
Western Bank Industrial Estate	Wigton	Workshop	21/12/07	233 (2,509)	£2.75psf		
Hewden	Cleator Moor	B1 Light Ind	06/12/07				Sold

Name	Location	Use	Date	Area sq m (sq ft)	Quoted Rent	Achieved	Terms
							£144,000
Leconfield Ind Est	Cleator Moor	B1 Light Ind	06/12/07				£140,000
Leconfield Ind Est	Cleator Moor	Industrial	03/12/07	96 (1,033)	£3.00psf	£2.90psf	
Sneckyeat Ind Est	Whitehaven	Workshop	01/12/07	45 (480)	£4.65psf	£3.76psf	
Sneckyeat Ind Est	Whitehaven	Workshop	01/12/07	176 (1,890)	£4.65psf	£3.76	
Station Yard	Wigton	Workshop	06/09/07	195 (2,095)	£3.58psf		
Cross Lanes	Seascale	Workshops	01/09/07	76 (796)	£4.25psf	£5.42psf	
Bridge End Ind Est	Egremont	Industrial	15/08/07	43 (467)	£4.91psf		
Bridge End Ind Est	Egremont	Industrial	15/08/07	43 (467)	£4.91psf		
Western Bank Ind Est	Wigton	Workshop	27/07/07	142 (1,533)	£3.61psf	£3.00psf	
Sneckyeat Ind Est	Whitehaven	Workshop	16/07/07	39 (423)	£4.66psf	£5.20psf	
Leaconfield Ind Est	Whitehaven	Industrial	29/06/07	506 (5,445)		£1.10psf	
Sneckyeat Ind Est	Whitehaven	Workshop	25/06/07	45 (484)	£4.65psf	£4.65psf	
Total				2,862 (30,271)			
2008 (April to Sept)							
Solway Trading Estate	Maryport	Industrial	16/06/08	42 (456)	£6.51psf	£2.91psf	
Solway Trading Estate	Maryport	Industrial	16/06/08	42 (456)	£6.51psf	£2.91psf	
Solway Trading Estate	Maryport	Industrial	01/06/08	123 (1,327)	▪	£1.92psf	
Salterbeck Trading Estate	Workington	Industrial	14/05/08	771 (8,300)	£3.20psf	£2.17psf	
Salterbeck Trading Estate	Workington	Industrial	07/05/08	462 (4,973)	£3.75psf	£3.62psf	
Clay Flatts	Workington	Industrial	01/05/08	93 (1,001)		£2.43psf	
Bridge End	Egremont	Industrial	24/04/08	200 (2,153)	£4.26psf	£4.09psf	
Bridge End	Egremont	Industrial	24/04/08	200 (2,153)	£4.26psf	£4.09psf	
Leconfield Industrial Estate	Cleator Moor	Industrial	01/04/08	46 (496)	£4.03psf	£4.03psf	
Total				1,979 (21,315)			

5.92 Industrial transactions are concentrated around the key industrial estates - Solway, Salterbeck, Clay Flatts, Bridge End, Leconfield and Sneakyeat. In terms of size of units transacted:

- Only 2 exceed 1,858 sq m (20,000 sq ft) - at Glasson and Leconfield
- Only 1 was between 900 sq m (10,000 sq ft) and 1,858 sq m (20,000 sq ft) - at Solway Trading Estate
- Only 4 are between 465 sq m (5,000 sq ft) and 900 sq m (10,000 sq ft) - at Solway, Salterbeck and Leconfield
- 15 deals are for units of between 93 sq m (1,000 sq ft) and 465 sq m (5,000 sq ft) and
- 13 are for units of less than 93 sq m (1,000 sq ft) - most of these are for units of around 50 sq m (500 sq ft)

- 5.93 It is worth noting that the industrial transactions data includes some B1 light industrial (assumed to be B1(c)). The only floorspace figure provided is in 2005/06 - 2,291 sq m, therefore it is a very small proportion of overall industrial demand.

Rents

- 5.94 The following table offers a summary of rents in West Cumbria in 2008.

Table 5.15 Summary of Rents in West Cumbria 2008

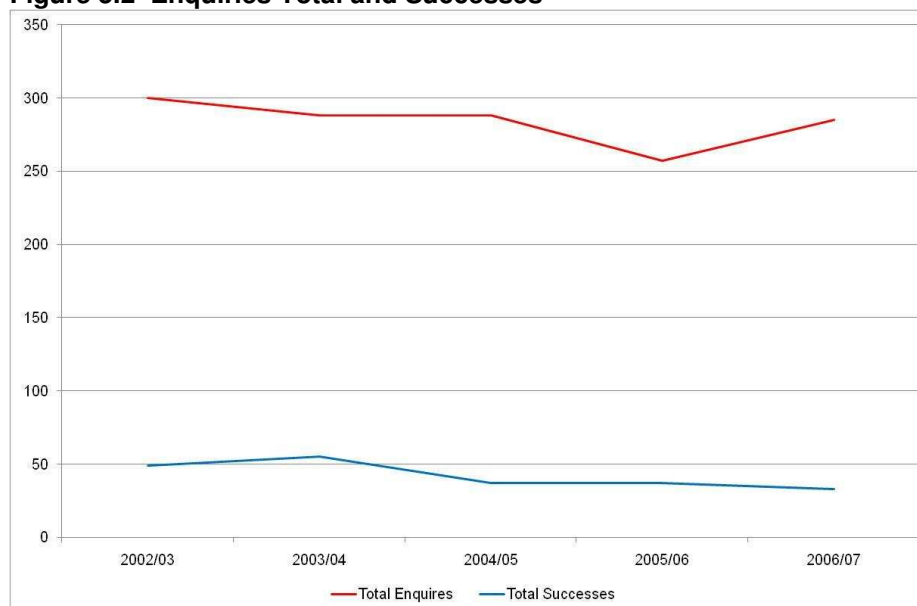
Use	Date	Area sq m	Quoted Rent	Achieved	Terms
Business Park/B1 offices	2008	63-114 sq m	£8.25-£14.26psf	£11.25 psf	Various terms
Industrial	2008	46 -771 sq m	£3.20-£4.75 psf	£2.17-£4.90 psf	All three year lease

- 5.95 The highest agreed industrial rent has been seen at the Cross Lanes in Seascale where rents at £5.42 psf have been achieved for units of 76 sq m (796 sq ft). The location with the lowest agreed rent is Leconfield Industrial Estate where rents as low as £1.10 psf have been agreed for an industrial unit of 506 sq m (5,445 sq ft).
- 5.96 The highest known achieved office rent is at Westlakes Science and Technology Park (£11.25 psf). Quoted rents are in excess of £14 psf in prime locations for new space i.e. Cockermouth and Westlakes Technology Park. Elsewhere quoted rents are £6 to £12 psf, with the highest interestingly in Wigton.

Enquiries

- 5.97 Information provided by WCDA suggests that there are up to 300 enquiries for employment floorspace in West Cumbria per annum. The chart below shows total figures from 2002/03 through to 2006/07, together with conversion rates ("successes").

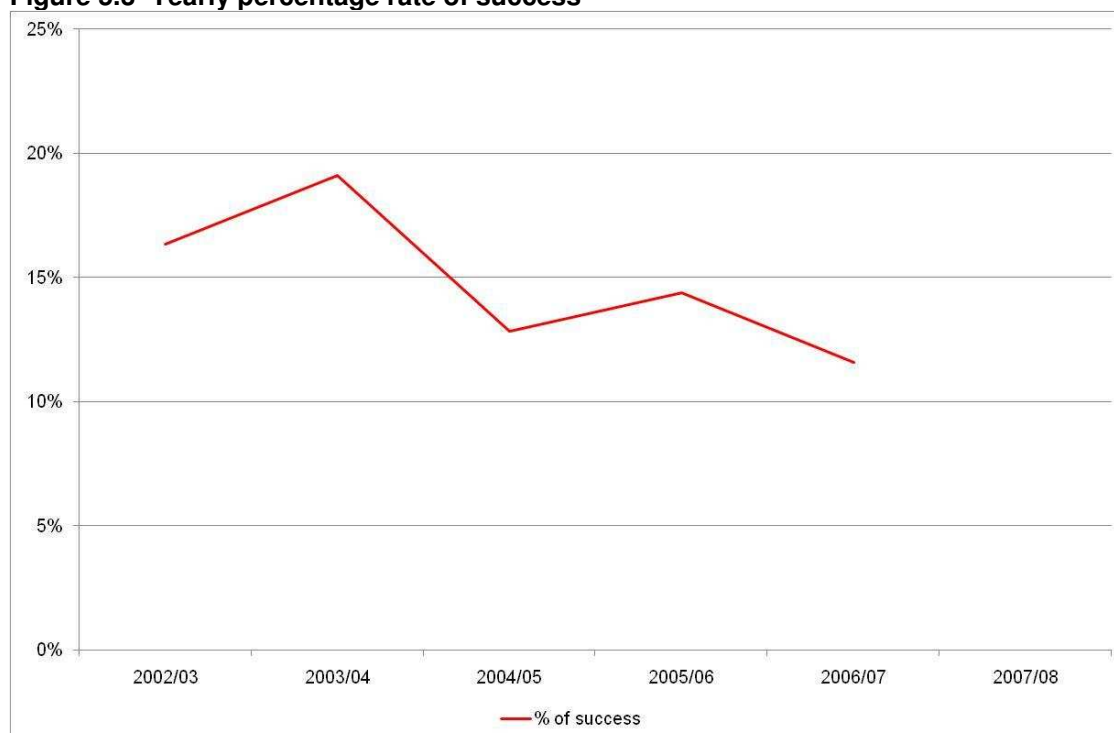
Figure 5.2 Enquiries Total and Successes



Source: WCDA

- 5.98 The number of enquiries declined in the period between 2004/05 through to 2005/06 but have risen once again to similar figures from previous years. The red line on the chart indicates how many of the enquiries were transformed in to successes. This shows that for the three year period from 2004/05 through to 2006/07 the number of enquires transformed into successes is in the mid thirties (37,37 and 33 respectively). This is a marked fall from around 50 conversions in the preceding two years. We also know that conversions in 2007/08 are down again at 27.
- 5.99 The success rate based on total enquiries, expressed as a percentage, is illustrated by the chart below. These figures indicate that up to 20% of enquiries each year are turned into successes. This is a very high success rate which could indicate a number of factors:
- Occupiers not including West Cumbria, on a general range of search but enquiring about the area for a specific reasons
 - Strong marketing by WCDA
 - Method of recording of enquiries (when does an enquiry become genuine?)
- 5.100 A 20% conversion rate is the maximum we would be expect to be achieved and probably most likely reflects the fact that potential occupiers would only look to West Cumbria for specific reasons, i.e. because they are local firms or are drawn in by a particular sector e.g. nuclear/energy related.

Figure 5.3 Yearly percentage rate of success



Source: WCDA

Local Enquiries and Inward Investment

5.101 The following table looks in more detail at property enquiries converted by the WCDA. The enquiries have been split into two categories, inward investment and local enquiries.

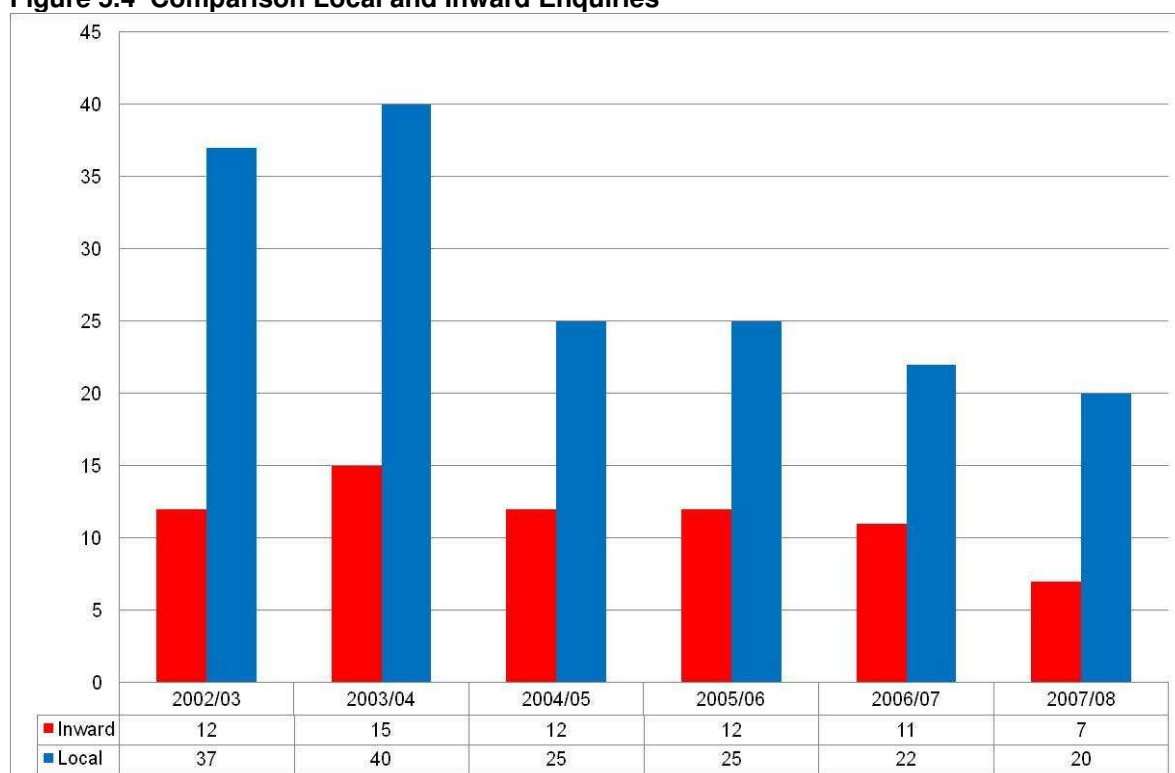
Table 5.16 Number of Property Enquiries Converted

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Inward	12	15	12	12	11	7
Local	37	40	25	25	22	20
Total	49	55	37	37	33	27

5.102 The table above shows that converted enquiries from local organisations outstrips enquiries from inward investors by between three and four times, and this has been the case every year for the last six years. The number of inward enquiries converted has remained fairly static. However it is notable that the proportion of total enquiries converted which are from inward investors has increased over the last three years and is now equivalent to 33% of all enquiries converted. This is due to a significant decline in the number of local enquiries converted.

5.103 This information is diagrammatically presented below. The chart clearly shows the peak in enquiries converted in 2003/04 and the gradual decline since then, a pattern followed by both local and inward investment enquiries.

Figure 5.4 Comparison Local and Inward Enquiries



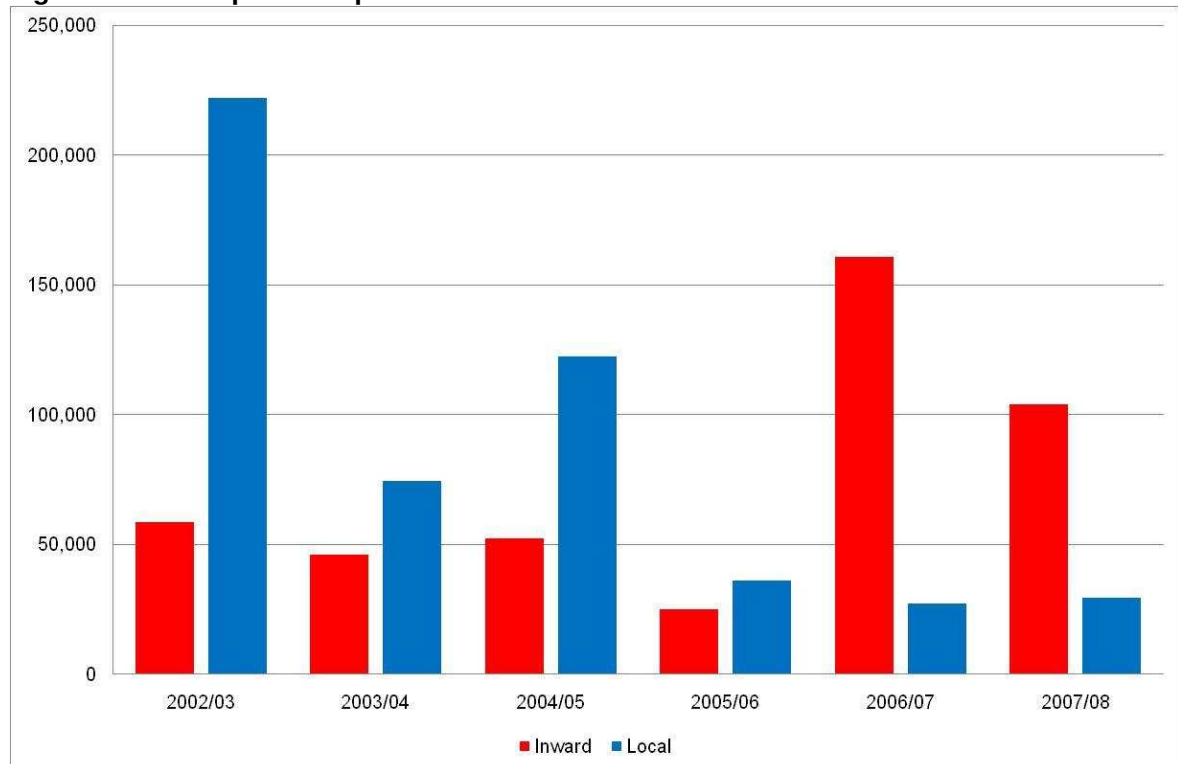
Source: WCDA

- 5.104 The table and chart below shows how much floorspace has been occupied by converted enquiries. 2002/03 was the year with most floorspace occupied - 26,000 sq m (280,710 sq ft), 20,600 sq m (220,100 sq ft) of this was from local enquiries. In 2007/08, 12,400 sq m (133,500 sq ft) has been occupied as a result of enquiries to WCDA. The average figure over the five years is 14,843 sq m pa (159,800 sq ft pa), for both office and industrial space. This compares to only 5,135 sq m pa of office and industrial deals recorded in the previous section. It is not clear why this discrepancy exists but may relate to different recording of deals and interpretation of successes.

Table 5.17 Enquiries Local and Inward by Floorspace (sq m)

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	Average
Inward	5,445	4,273	4,877	2,332	14,920	9,652	6,917
Local	20,633	6,912	11,380	3,354	2,527	2,750	7,926
Total	26,078	11,185	16,257	5,686	17,447	12,402	14,843

Figure 5.5 Floorspace comparison



Source: WCDA

- 5.105 In 2006/07 and 2007/08 inward enquiries outstripped local enquiry successes in terms of floorspace by a significant margin. 2006/07 saw inward enquiries converted into 14,920 sq m (160,600 sq ft), the highest figure over the period. This indicates the declining levels of local enquiries converted as well as a general demand for larger units from inward investors.

Enquiries by Sector

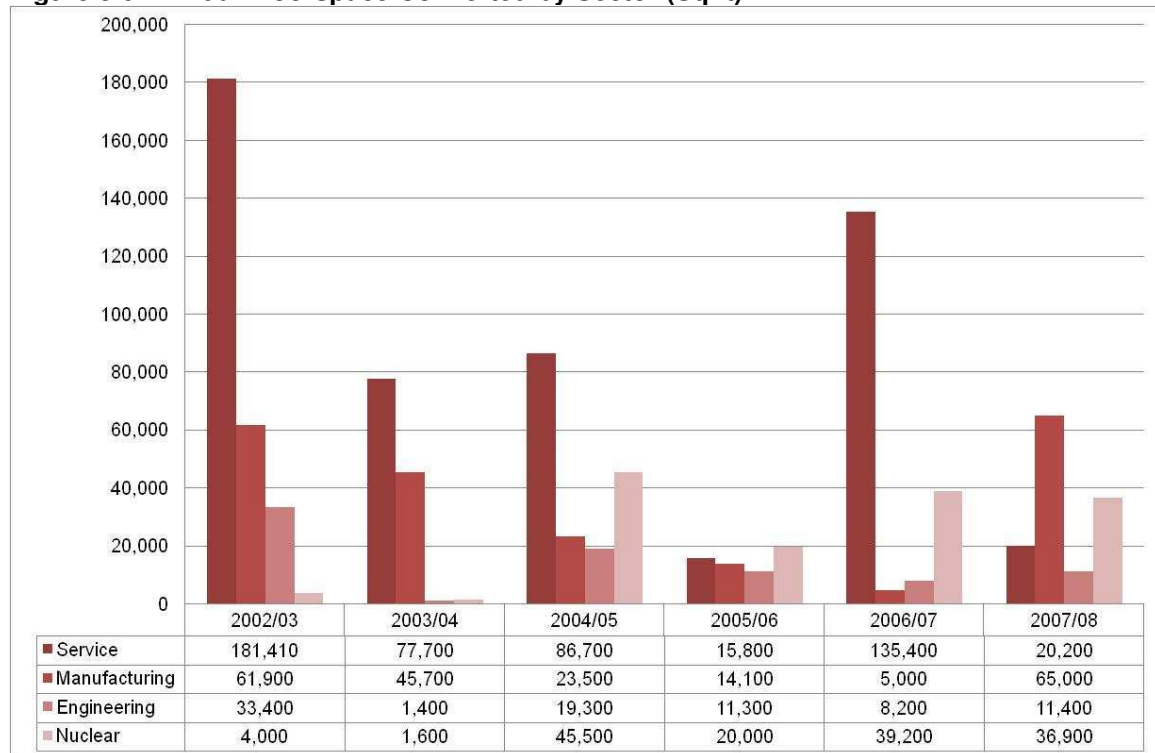
- 5.106 The following table indicates enquiries by sector and floorspace on a yearly basis for a six year period.

Table 5.18 Enquires by Sector and Floorspace (sq m)

Floorspace	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	Total
Service	16,853	7,218	8,054	1,468	12,579	1,877	48,049
Manufacturing	5,751	4,246	2,183	1,310	465	6,039	19,994
Engineering	3,103	130	1,793	1,050	762	1,059	7,897
Nuclear	372	149	4,227	1,858	3,642	3,428	13,676
Total	26,079	11,743	16,257	5,686	17,448	12,403	89,616
No of Enquiries							
Service	32	37	26	22	16	14	147
Manufacturing	11	14	5	4	3	3	40
Engineering	14	2	4	5	7	8	80
Nuclear	2	2	2	6	6	2	20
Total	59	55	37	37	32	27	287

- 5.107 The service sector has seen most successes in terms of number of enquiries converted and amount of floorspace taken up. The service sector has accounted for the largest proportion of floorspace in four out of the six years, the only exceptions being 2005/06 and 2007/08 where it saw considerable underperformance in relation to other years in the period. On average 8,000 sq m (86,000 sq ft) of floorspace has been transacted each year in the service sector.¹⁰ Unit size required by this sector varies significantly, from 18 sq m (200 sq ft) up to 7,400 sq m (80,000 sq ft), the majority however are at the smaller end of the size range and are under 929 sq m (10,000 sq ft).
- 5.108 Demand from the manufacturing sector saw a notable decline between 2002/03 and 2006/07. There has been a marked rise in 2007/08 when a larger amount of floorspace was occupied in this year than any other year over the last six years, although the number of enquiries converted remained low. Over the six years around half of units required were under 93 sq m (1,000 sq ft), and only 5 out of 40 required over 929 sq m (10,000 sq ft).
- 5.109 The floorspace taken up by the nuclear sector has seen a marked increase since a low of 149 sq m in 2003/04. This sector saw strongest demand in 2004/05 with enquiries relating to 4,227 sq m of floorspace taken up. There has been an upward trend again over the last three years, and this has been confirmed by consultations with WCDA and developers. **On average in the region of 2,300 sq m (25,000 sq ft) has been required for nuclear related demand over each of the last six years.** The nature of this demand is mixed - generally for smaller scale satellite offices to accommodate between five and 30 staff, higher tech laboratory space and industrial units with high eaves to accommodate large equipment. Industrial units of up to 3,350 sq m (36,000 sq ft) have been occupied; most office units are at the smaller end of the scale, around 185 sq m (2,000 sq ft), with the odd larger requirement of up to 2,300 sq m (25,000 sq ft).
- 5.110 The trend in the engineering sector has been up and down with a high of 3,103 sq m taken up in 2002/03 and a low of 130 sq m in 2003/04.
- 5.111 The diagram below illustrates the trends diagrammatically.

¹⁰ WCDA include industrial and retail activity in 'services'

Figure 5.6 Annual Floorspace Converted by Sector (Sq ft)

Source: WCDA

- 5.112 It is also possible to analyse enquiries by use, broadly correlating to use classes. This is set out in the table below. This illustrates that **on average 1,764 sq m (18,990 sq ft) of floorspace has been taken up pa for B1 office uses pa and 13,029 sq m (140,250 sq ft) for industrial uses (B2 or B8) pa**. Unfortunately the data does not permit us to break this down into general industrial and warehousing.

Figure 5.19 Enquiries Converted by Use

	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	Total	Average
Office (B1)	1,334	2,230	3,401	2,035	1,069	288	10,358	1,726
Industrial (B2 & B8)	24,439	9,108	12,807	3,652	16,329	11,840	78,175	13,029
Retail	316	409	56	0	56	279	1,115	186
Total	26,088	11,747	16,264	5,688	17,454	12,407	89,648	14,941

- 5.113 Using standard plot ratios we can convert this into land requirements.

Use	Floorspace pa	Plot ratio	Land Requirement pa
Office	1,764	40%	0.44
Industrial	13,029	40% industrial 35% warehousing	3.47

- 5.114 The WCDA enquiries confirm the deals data in terms of size of units demanded which is predominantly for small units. For offices the average size unit over the last six years is 126 sq m (1,350 sq ft) and for industrial 501 sq m (5,400 sq ft).

Past Take-Up: Implications for Employment Land Review

- The different methods of calculating demand result in the following ranges of employment land requirements

Method	Development Rates		Transactions		Enquiries	
	Sq m pa	Ha pa	Sq m pa	Ha pa	Sq m pa	Ha pa
Office (B1)	13,200	3.3	1,704	0.4	1,764	0.4
Industrial (B2 & B8)	2,625	0.7	3,431	0.9	13,029	3.5

- Development rates indicate much stronger demand for office uses transactions and enquiries which are indicators of occupier demand. However a significant amount of office development has been pump primed by the public sector and as such development rates do not necessarily reflect true market demand
- In contrast transactions and enquiries data indicates much stronger occupier demand for industrial. This reflects general churn in the market and the lack of new industrial development in West Cumbria. It probably also reflects the shift in premises provision by the public sector towards B1 (including light industrial) and away from traditional industrial sheds

Evidence of Demand: Employment Forecasts

- 5.115 Modelling employment growth is an alternative approach to predicting future employment land requirements.
- 5.116 This section presents a review of three sets of forecasts:
- Forecasts produced by Experian in September 2007 as part of the West Cumbria Spatial Masterplan
 - Forecasts produced by Cumbria Vision
 - Forecasts produced by DTZ as part of an earlier Employment Site and Premises Study in July 2006
- 5.117 Brief commentary is provided on the September 2007 Experian, while detailed analysis has been undertaken based on the Cumbria Vision and DTZ Forecasts. This analysis looks at growth in B1 (Office), B2 (Industrial) and B8 (Warehousing) jobs from 2008-2023¹¹, in addition to translating this future change into floorspace and employment land requirements. We provide a summary at the end of this section on what the forecasts show and it is important to note that the three sets of forecasts are not directly comparable due to the use of different employment sector definitions.

Experian Forecasts

- 5.118 As part of the West Cumbria Spatial Masterplan, an econometric model of the area has been developed to look at employment forecasts as a result of a series of “transformational” projects. The model analyses change from 2007-2027 and estimates that under a baseline scenario (i.e. do-nothing), the number of FTEs in 2027 would be around 58,800. In contrast this figure rises to 72,000 FTEs (in addition to the safeguarding of 2,000 FTEs) with the successful implementation of the transformational projects.

¹¹ The Cumbria Vision forecasts run from 2006-2016, therefore an average annual growth rate has been calculated and then applied to the data to run until 2023

- 5.119 These are the most recent forecasts produced on the West Cumbria economy, however it is not possible to breakdown the expected growth by sector. We therefore move on to analyse forecasts produced by Cumbria Vision and from earlier work by DTZ - both of which allow for analysis of sectoral change.

Cumbria Vision Forecasts

- 5.120 Table 5.20 shows future employment estimates in West Cumbria based on the forecasts by Cumbria Vision.

Table 5.20 Employment Change - Cumbria Vision Baseline Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	13,400	13,000	12,700	12,600	-800	-6%
Industrial	27,200	24,700	18,700	22,300	-4,900	-18%
Warehousing	5,300	5,200	5,300	5,200	-100	-2%

Source: Cumbria Vision, adapted by DTZ

- 5.121 Employment changes have been translated into a change in premises requirements using standard employment densities. These indicate the average amount of space occupied per employee in different use types. The average employment densities used by Cumbria Vision in the Baseline Scenario are:

- Offices (B1): 19 sq m per employee
- Industrial (B2): 34 sq m per employee
- Warehousing (B8): 50 sq m per employee

- 5.122 Table 5.21 shows the floorspace requirements based on these densities.

Table 5.21 Floorspace Change (sq m), 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	254,600	247,000	241,300	239,400	-15,200	-6%
Industrial	924,800	839,800	635,800	758,200	-166,600	-18%
Warehousing	265,000	260,000	265,000	260,000	-5,000	-2%

Source: Cumbria Vision - Baseline Scenario, adapted by DTZ

- 5.123 The next step is to translate floorspace into land requirements using estimates of plot ratios (the proportion of a site that the premises will occupy). The assumptions used by Cumbria Vision for each of the land use types are:

- Offices: 40% plot ratio
- Industrial: 40% plot ratio
- Warehousing: 40% plot ratio

- 5.124 The change in employment land requirements is set out in Table 5.22.

Table 5.22 Employment Land Change (ha), 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	63.7	61.8	60.3	59.9	-3.8	-6%
Industrial	231.2	210.0	159.0	189.6	-41.7	-18%
Warehousing	66.3	65.0	66.3	65.0	-1.3	-2%

Source: Cumbria Vision - Baseline Scenario, adapted by DTZ

DTZ Forecasts

- 5.125 In July 2006, DTZ produced two sets of employment forecasts as part of an Employment Sites and Premises Study: **1. Baseline forecasts** taking into account trends in the nuclear sector and wider economy; and **2. Optimistic forecasts** taking into account planned regeneration initiatives. These forecasts looked at change between 2005 and 2020, however they have been carried forward until 2023 for the purposes of this report. Tables 5.23 and 5.24 show employment change under the Baseline and Optimistic scenarios respectively. It should be noted that employment trends at Sellafield are excluded from the analysis, consistent with the July 2006 study.

Table 5.23 Employment Change - DTZ Baseline Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	7,700	7,700	7,800	8,300	600	8%
Industrial	7,100	6,500	5,900	5,400	-1,700	-24%
Warehousing	1,700	1,600	1,500	1,500	-200	-12%

Source: Cumbria Vision, adapted by DTZ

Table 5.24 Employment Change - DTZ Optimistic Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	7,800	8,300	8,800	9,400	1,600	21%
Industrial	7,300	7,000	6,800	6,700	-600	-8%
Warehousing	1,700	1,700	1,800	1,900	200	12%

Source: Cumbria Vision, adapted by DTZ

- 5.126 Employment changes have been translated into a change in premises requirements using the standard employment densities outlined below. These were used in the July 2006 report and it should be noted that they differ slightly to those used by Cumbria Vision.

- Offices (B1): 18.5 sq m per employee
- Industrial (B2): 32 sq m per employee
- Warehousing (B8): 65 sq m per employee

- 5.127 Tables 5.25 and 5.26 show the floorspace requirements based on these densities for Baseline and Optimistic scenarios respectively.

Table 5.25 Floorspace Change (sq m) - DTZ Baseline Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	142,450	142,450	144,300	153,550	11,100	8%
Industrial	227,200	208,000	188,800	172,800	-54,400	-24%
Warehousing	110,500	104,000	97,500	97,500	-13,000	-12%

Source: Cumbria Vision, adapted by DTZ

Table 5.26 Floorspace Change (sq m) - DTZ Optimistic Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change
Offices	144,300	153,550	162,800	173,900	29,600	21%
Industrial	233,600	224,000	217,600	214,400	-19,200	-8%
Warehousing	110,500	110,500	117,000	123,500	13,000	12%

Source: Cumbria Vision, adapted by DTZ

5.128 Floorspace has been translated into land requirements using the following plot ratios, which again differ slightly to those used by Cumbria Vision:

- Offices: 40% plot ratio
- Industrial: 40% plot ratio
- Warehousing: 35% plot ratio

5.129 The change in employment land requirements for the Baseline and Optimistic scenarios is set out in Tables 5.27 and 5.28 respectively.

Table 5.27 Employment Land Change (ha) - DTZ Baseline Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change	Land Requirement pa
Offices	35.6	35.6	36.1	38.4	2.8	8%	0.2
Industrial	56.8	52.0	47.2	43.2	-13.6	-24%	-0.9
Warehousing	31.6	29.7	27.9	27.9	-3.7	-12%	-0.3

Source: Cumbria Vision, adapted by DTZ

Table 5.28 Employment Land Change (ha) - DTZ Optimistic Scenario, 2008-2023

	2008	2013	2018	2023	Change 2008-23	% Change	Land Requirement pa
Offices	36.1	38.4	40.7	43.5	7.4	21%	0.5
Industrial	58.4	56.0	54.4	53.6	-4.8	-8%	-0.3
Warehousing	31.6	31.6	33.4	35.3	3.7	12%	0.3

Source: Cumbria Vision, adapted by DTZ

Employment Projections: Implications for Employment Land Review

- The **Experian forecasts** show that if the planned series of “transformational” projects are implemented between 2007 and 2027, the number of FTEs will be 72,000 - compared to only 58,800 if nothing is done to support the economy
- The **Cumbria Vision forecasts** suggest declining employment in B1, B2 and B8 land uses, totalling around 5,800 fewer jobs from 2008-2023. The majority of this decline can be accounted for by jobs losses at Sellafield. The resulting floorspace is estimated to fall by around 187,000 sq m, which translates into declining employment land requirements of 47ha
- The **DTZ forecasts** estimate the following long-term changes between 2008 and 2023 in West Cumbria:
 - Office employment to rise by between 600 and 1,600 jobs. This results in floorspace change of 11,100-29,600 sq m and employment land requirements of 2.8-7.4ha, or 0.2 to 0.5 ha pa
 - Continuing declines in industrial employment of between 600 and 1,700 jobs (excluding trends at Sellafield). This results in floorspace declines of 19,200-54,400 sq m and a fall in employment land requirements of 4.8-13.6ha, or -0.9-0.3 ha pa
 - Warehousing employment to remain fairly static. Under the Baseline scenario it is estimated to fall by 200, however under the Optimistic scenario around 200 jobs are created up to 2023. This translates into a floorspace requirement of -13,000 sq m to +13,000 sq m and employment land requirements of -3.7 ha to +3.7 ha pa, or -0.3 ha to +0.3 ha pa

	Baseline Land Requirements		Optimistic Land Requirements	
	Sq m pa	Ha pa	Sq m pa	Ha pa
Office (B1)	740	0.2	1,973	0.5
Industrial (B2)	-3,627	-0.9	-1,280	-0.3
Warehousing (B8)	-867	-0.3	867	0.3

- We would recommend that the DTZ forecasts are the most robust for the purpose of this study:
 - They provide a range of forecasts and also incorporate information on the impact of various planned projects for West Cumbria, based on information provided by West Lakes Renaissance
 - The Cumbria Vision forecasts broadly show the same trends, but they are based on a starting year of 2002, whereas DTZ's begin in 2004
 - The Cumbria Vision forecasts use different definitions of the sectors, which are not appropriate to employment land studies, for example education and public sector are included within the office requirement
 - Experian's forecasts are extremely aspirational and future planning should not be driven by these, however it is clearly important that flexibility is retained within the employment land supply to ensure that future ambitions can be met

6.0 Gap Analysis

Introduction

- 6.1 The gap analysis brings together the preceding sections in order to set out the gaps in terms of employment land and premises demand and supply in West Cumbria.

Market Balances and Imbalances

Quantitative Gap Analysis (Years' Supply)

- 6.2 The section below sets out the years' supply of employment floor space which is available and in the planning pipeline (under construction or with permission) and the potential capacity of remaining available employment land. "Year's Supply" uses annual demand estimates (set out in Section 5) to calculate the number of years supply of floorspace available now or in the pipeline. This is considered in the context of the 15 year study period to understand the extent of over or under-supply. The calculations use all the methods of estimating demand to produce a likely range of years' supply i.e.:

- Historic Trend Analysis:
 - Development rates, indicating developer demand
 - Transactions indicating occupier demand
 - Enquiries indicating occupier demand
- Employment projections
 - Baseline scenario
 - Accelerated Growth Scenario
 - Aspirational Scenario

- 6.3 Before bringing this analysis together it is important to understand the strengths and weaknesses of the different approaches to calculating demand as they produce highly variable requirements.

Past Take-up: Strengths and Weaknesses

- Historic trends analysis is based on gross past take-up, i.e. churn within the local market and new additional take-up. This helps us to understand the wider picture, however it can over estimate demand as not all occupiers will require new space, in fact it is a relatively small proportion of gross take-up which will do so
- Past take-up was influenced by the economic cycles and the property market conditions prevailing at the time. Usually we would recommend that past take-up is a good indicator of future demand in the short term as there is a high probability that these conditions will continue to prevail in this time period. However, at the current time this is generally less certain as the property market has been hit hard by the 'credit crunch'. That said market demand in West Cumbria has historically been weak and pump primed by the public sector, and therefore the impact of the credit crunch could arguably have less of an impact than in a location with a strong market. On the other hand the public sector is also feeling the pinch as reserves of public money are channelled into other priorities. As such the

ability of the public sector to drive the West Cumbria market in the short term will probably be reduced

- Sectoral patterns of past take-up reflect the structure of the local economy at that time and do not take account of future economic restructuring, both planned and organic. In West Cumbria the Energy Coast masterplan seeks to build upon opportunities in the energy sector, in both nuclear and non-nuclear industries, and it is essential that future land use planning does not compromise the achievement of those ambitions. This is particularly challenging at this stage when it is difficult to quantify the likely impact of these ambitions in land and premises terms

In addition to these general strengths and weaknesses of the past take-up approach, there are distinct differences between the three past take-up methods:

- **Development Rates:** These relate only to new development and indicate developer rather than occupier demand. For this reason take-up rates based on development rates will usually be below take-up rates based on the other two methods and should therefore be treated as a minimum indicator of the requirement for new land and floorspace
- **Transactions:** These represent actual investment by both investors and occupiers. However the level of investment/deals will be restricted by the availability of land and premises which meet investor requirements. Transactions relate to both new and second-hand space and so can be expected to be higher than development rates
- **Enquiries:** Total enquiries include all enquiries irrespective of how significant or genuine they are. Enquiries for floorspace indicate occupier demand. Conversion rates of enquiries like transactions are restricted by the availability of suitable land and premises. However the benefit of enquiries information is that we are able to compare it with transactional data and supply data to get a feel for current conversion rates and whether these are restricted by supply, and if so understand what realistic target conversion rates might be. In the case of West Cumbria conversion rates now are high (based on WCDA figures) and as such we have not introduced a target rate

Employment Projections: Strengths and Weaknesses

- Employment modelling indicates economic growth by identifying additional jobs which will be generated. This is converted to a land/floorspace requirement which represents only net additional take-up, i.e. it excludes churn within the market. Arguably this provides a more accurate picture of additional floorspace/land requirements than past trends, particularly in the longer term
- However projections are only as reliable as their inputs. In the case of employment projections baseline modelling is a relatively accurate picture of what will happen if current trends continue. However, aspirational modelling, is based on assumptions about future economic growth in key sectors if certain interventions happen as planned. Any variations will of course impact on actual growth. Aspirational scenarios are dependent upon a return to more favourable financial situations for both the public and private sectors. In the case of West Cumbria they are also highly dependent upon successful economic restructuring and maximising opportunities emerging from the energy sector
- In terms of employment land supply there is a fine balance to be drawn between ensuring there is adequate employment land in the right locations which will meet future demand and not compromise the delivery of economic objectives, and providing an oversupply of employment land which will never be required for employment uses and which could be put to more valuable (in economic terms) uses
- Employment projections are particularly misleading for industrial demand. Employment in manufacturing is declining in general, therefore when converted this indicates negative land requirements. In reality the manufacturing sector will always require new premises and land which better meet modern requirements. This is even more important in locations which have lost their traditional industries, such as West Cumbria, where economic restructuring is focused on new growth sectors and higher value activities in established industries which have very different land and premises requirements

- 6.4 The conversion of floorspace into land requirements under all methods is also very sensitive to the plot ratios used. We have used industry standard ratios (40% for office, assumes 2-storey development, 35% for warehousing and 40% for industrial, assumes 1-storey development). We do not see any justification for amending these ratios given the characteristics of West Cumbria and the densities of development occurring here now and likely to occur in the future.
- 6.5 Levels of demand indicated by the different methods are set out in Section 6 and for ease of reference and comparison in Table 6.1 below.

Table 6.1 Annual Demand

Use	Past Take-Up by Method						Employment Projections by Scenario			
	Development Rates		Transactions		Enquiries		DTZ Baseline		DTZ Optimistic	
	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m	Ha	Sq m
Office (B1)	3.3	13,200	0.4	1,704	0.4	1,764	0.2	740	0.5	1,973
Industrial (B2)	0.7	2,625	0.9	3,431	3.5	13,029	-1.2	-4,494	0	-413
Warehousing (B8)							-0.3	-867	0.3	867
Total	4	15,825	1.3	5,135	3.9	14,793	-1.3	-4621	0.8	2427

- 6.6 On the basis of these levels of demand we are able to calculate years' supply of employment land for broad use classes and general employment space. Table 6.2 sets out years supply in terms of available supply and commitments (i.e. sites under construction or with planning permission for employment uses). The following paragraphs analyse these findings in more detail.

Table 6.2: Years Supply of Employment Land (Available and Committed) by Use

Use	Supply			Years Supply					
	Available (sq m)	Under Construction (Ha)	With Permission (Ha)	Past Take-Up by Method			Employment Projections by Scenario		
				Development Rates	Transactions	Enquiries	DTZ Baseline	DTZ Optimistic	
Office (Ba)	7,562	0	1.91	1.2	9.2	9.1	19.8	7.7	
Industrial (B2)	37,809	1.66	4.67	27.7	21.3	5.6	n/a	n/a	
Warehousing (B8)		0	2.96				n/a	n/a	
General Employment	n/a	3.21	2.11	1.3	4.1	1.4	n/a	10.6	
Total	45,371	4.9	11.7	30.2	34.6	16.1	19.8	18.3	

Note: n/a is a meaningless negative years supply figure (see text below)

- 6.7 The following key messages can be drawn from this analysis:
- For all uses gross past take-up rates suggest that West Cumbria has between 16 and 34 years supply either available or committed
 - Employment projections suggest there is between 18 and 20 years supply
 - The broad message therefore is that within the existing committed and available supply there is sufficient land and premises to meet West Cumbria's requirements over the 15 year plan period

- It should be noted that although employment projections suggest overall employment will remain fairly static (a small decline under the baseline scenario and a small increase under the optimistic scenario), there is a negative years supply under both scenarios for industrial and warehousing. This is a result of the large available supply of industrial and warehousing premises and the projected significant decline of general industrial employment. The very small increase in warehousing employment does not compensate for the large decline in manufacturing employment. A negative land requirement should actually be interpreted as a nil requirement in terms of employment land and therefore years' supply figures cannot be calculated (shown as n/a in Table 6.2)

6.8 In terms of land supply there are important differences by sector and a number of qualitative issues which also need to be taken into account in determining employment land requirements over the plan period.

Gap Analysis by Sector

6.9 Table 6.3 sets out more detailed analysis of office supply.

Table 6.3 Committed Office Supply (B1): Years Supply

	Supply		Years Supply				
	Land (ha)	Floorspace (sq m)	Based on Past Take-Up			Based on Employment Projections	
			Method 1 Development Rates	Method 2 Transactional Data	Method 3 Analysis of Enquiries	DTZ Baseline	DTZ Optimistic
Available	n/a	7,562	0.6	4.4	4.3	10.2	3.8
Under Construction	0	n/k	0.0	0.0	0.0	0.0	0.0
Planning Permission	1.91	n/k	0.6	4.8	4.8	9.6	3.8
Total	1.91	-	1.2	9.2	9.1	19.8	7.7

- 6.10 Unusually in West Cumbria development rates for offices indicate that developer demand actually exceeds occupier demand (see Table 6.1). As a result using development rates it appears that there is only 1.2 years supply of office floorspace available or in the committed pipeline (this excludes sites with permission for general employment uses). In comparison transactions and enquiries indicate there is over nine years supply.
- 6.11 Both baseline and optimistic employment projections indicate growth in the service sector, and hence an increased requirement for offices. The optimistic scenario is in line with past take-up (bearing in mind that this is net change) in that it indicates there is around 8 years supply either available or in the pipeline. However the baseline projects that there is almost 20 years supply, more than enough for the plan period.
- 6.12 Past development rates reflect the significant amount of office floorspace which has either been directly developed or gap funded by the public sector in West Cumbria. As such the occupier market is lagging behind. Baseline employment projections assume past economic structures and growth patterns will continue into the future and do not allow for any intervention which seeks to restructure and regenerate the local economy. As such baseline projections are a 'reality check' on future prospects, but it can be expected in the context of significant planned intervention that actual

growth rates in the service sector will be higher than this. On the other hand the optimistic scenario assumes that all interventions happen as planned. We already know that the current financial crisis has had the biggest impact on schemes in regeneration areas due to their sensitivity to changes in costs and values - it is unlikely that West Cumbria will be any different, particularly given its reliance on the public sector. However the area does have a key advantage, the specific driver of the nuclear sector, which may ensure it can withstand the current economic slowdown. Decommissioning will progress irrespective of the economy and associated opportunities should still flow from it.

6.13 The overall conclusions and implications for the employment land review are:

- There is almost certainly inadequate supply of available and committed office floorspace to fulfil requirements for the plan period - at best there is no more than 10 years supply. This holds true unless there is no economic restructuring in West Cumbria over the next 15 years, which is highly unlikely
- It will be important to ensure there are future opportunities to provide higher quality office space in the area to meet the needs of the nuclear and service sectors,
- For these reasons we recommend that West Cumbria ensures it can continue to accommodate past development rates to ensure no shortfall in supply. Given the 'lumpiness' of past take-up (5 ha and 10 ha were taken up in two different years) it is essential to retain a future supply which can accommodate such requirements rather than simply focusing on average take-up.

6.14 Table 6.4 sets out years' supply of industrial and warehousing space (available and in the pipeline).

Table 6.4 Committed Industrial and Warehousing Supply: Years Supply

	Supply		Years Supply				
	Land (ha)	Floorspace (sq m)	Based on Past Take-Up			Based on Employment Projections	
			Method 1 Development Rates	Method 2 Transactional Data	Method 3 Analysis of Enquiries	DTZ Baseline	DTZ Optimistic
Available (B2 & B8)	n/a	37,809	14.4	11.0	2.9	n/a	n/a
Under Construction (B2)	1.66	n/k	2.4	1.8	0.5	n/a	n/a
Under Construction (B8)	0	n/k				0	0
Planning Permission (B2)	4.67	n/k	10.9	8.5	2.2	n/a	n/a
Planning Permission (B8)	2.96	n/k				n/a	9.9
Total	9.29	37,809	27.7	21.3	5.6	n/a	9.9

6.15 The following key messages can be drawn:

- Past take-up indicates between 5.6 and 27.7 years supply for industrial uses. In this case developer demand is much lower than occupier demand. There is a significant difference between the level of demand indicated by enquiries and that indicated by transactions

- The nature of the industrial market in West Cumbria is that the majority of demand is locally generated and is for cost effective, small scale space. Good quality industrial units have often proved difficult to let at market rents, hence low developer demand. Occupiers are often satisfied with low value, second hand space. Although there is proven demand in West Cumbria's prime industrial estates, e.g. Lillyhall and Bridge End, we would still suggest that, in terms of past take-up, development rates are the best indicator of future demand. Development rates have also been reasonably consistent over the last five years
- Employment projections predict a decline in manufacturing employment and therefore a nil land requirement. Arguably this strengthens the argument for releasing sites which would be attractive to traditional industries
- However industrial occupiers will still continue to require new space which meets modern industrial requirements. This will be across the range of sizes of units, but in West Cumbria evidence indicates demand will be predominantly at the smaller end of the scale, and will not exceed units of 4,645 sq m (50,000 sq ft)
- In West Cumbria there is evidence of latent demand for small scale workshops. Where these have been provided they have been reasonably successful in most locations. Flexible units will be a key element of future supply in rural areas
- Baseline employment projections also predict a decline in warehousing based employment. In contrast however the optimistic scenario predicts minor growth in this sector in West Cumbria. West Cumbria's geographical isolation means that logistics and storage demand will be predominantly locally generated, and therefore does not require the large scale units required by regional and national operators. However, B8 pipeline supply is low and employment projections indicate that there is only 10 years supply of B8 premises either available or in the planning pipeline. It is therefore essential that employment sites are provided in the best logistics locations to maximise the potential of this sector over the plan period and beyond. In West Cumbria this potential is almost solely based on Lillyhall
- West Cumbria's future economic direction is being built on the energy sector and its supply chain. This sector has a wide range of needs in terms of premises, from office based, through to small scale workshops and large industrial units, depending upon the activities and processes involved. The majority of requirements will be for fairly standard sheds, although these will need to be relatively close to Sellafield. However there is evidence of some specific demands from this sector with some occupiers requiring larger units with high eaves (8 m) to accommodate cranes (akin to larger warehouses)
- It is difficult to quantify future levels of demand in some cases, particularly that which will be generated by the nuclear sector and its supply chain and latent demand for small scale workshops, so it is important to look at overall supply and the amount of 'slack' in this to ensure that such requirements can be accommodated

6.16 Table 6.5 sets out the additional supply of employment land on sites which are under construction or in the planning pipeline. The specific nature of the employment use in these cases has not been specified. Years supply has been calculated by totalling annual demand for all uses.

Table 6.5 Committed General Employment Supply (B1, B2 & B8): Years Supply

	Supply		Years Supply				
	Land (ha)	Floorspace (sq m)	Based on Past Take-Up			Based on Employment Projections	
			Method 1 Development Rates	Method 2 Transactional Data	Method 3 Analysis of Enquiries	DTZ Baseline	DTZ Optimistic
Available	n/a	n/a	0.0	0.0	0.0	0.0	0.0
Under Construction	3.21	n/k	0.8	2.5	0.8	n/a	6.4
Planning Permission	2.11	n/k	0.5	1.6	0.5	n/a	4.2
Total	5.32	-	1.3	4.1	1.4	n/a	10.6

- 6.17 There is potentially between 1 and 11 years additional supply on general employment sites. Where the local authority can still influence the nature of provision on these sites they should be guided by the quantitative requirements identified by sector below and the qualitative issues set out in the remainder of this section, and the recommendations set out in Section 8.

Implications for the ELR: Employment Land Supply 2008-2023

- 6.18 The previous section has set out the range of employment land requirements which are generated using the different approaches and methods to calculating employment land demand. We have considered the pros and cons of the different methods and the most likely real outcome. In order to inform the planning process we build on this analysis below to set out employment land requirements for the plan period, broken down by 5 year intervals and by use class.
- 6.19 The assumptions used are as follows:
- Generally market demand in West Cumbria is low but it is essential that employment land supply does not constrain future regeneration
 - For offices development rates provide the 'safest' indicator of future demand, although it is accepted that demand may fall below these levels. Average requirements (3.3 ha) have been used in most years, but annual figures have been increased once every four years (up to 6 ha) to allow for one off requirements (as indicated by past trends - see Table 6.1) and to ensure supply is not constrained for this important growth sector
 - For industrial and warehousing uses requirements are based on a realistic assessment of past take-up. Enquiries are arguably the 'safest' indicator of future demand as they suggest the highest figure. But realistically this is likely to be on the high side, particularly in the light of declining employment in the manufacturing sector. Furthermore future industrial requirements in this location are likely to be for better quality, smaller workshop type units and lock up sheds rather than large scale industrial sheds (although there will be some requirements at the larger end of the market). As such annual requirements have been reduced to 2.5 ha
 - The only indicator which separates warehousing from general industrial uses is the future employment projections. The optimistic scenario indicates future growth in this sector which translates into a net annual requirement of 0.3 ha pa. However we would prefer to allow for

a higher rate of take-up, say up to 1ha, to take account of churn and changing needs. We have separated out B2 and B8 requirements consistent with these assumptions

- For all sectors an additional 20% has been applied on top of projections to allow for choice in the market
- Requirements for the first five years have not been reduced to take account of the current economic climate, for two reasons. Firstly this will not impact upon the timing of nuclear decommissioning and requirements arising out of this. And secondly long term planning should not be significantly affected by a short term economic situation, indeed we can expect that the plan period will cover around two economic cycles

Five yearly requirements are set out in Table 6.6 below.

Table 6.6 Employment Land Requirements: 5 year bands by use class

Use Class	Land requirement (ha)			
	2008-13	2013-18	2018-23	Total
B1	23	23	23	69
B2	9	9	9	27
B8	6	6	6	18
Total	38	38	38	114

- 6.20 West Cumbria currently has 181 ha of employment land available on the sites considered as part of this study. This is additional to the available and committed supply set out previously. The requirements set out in Table 6.6 above will only require 63% of this supply if none of the existing commitments came forward. There is therefore clearly a more than adequate supply to meet requirements during the plan period and suggests scope for de-allocation. However there a number of qualitative issues which must be taken into account before going down the route of de-allocation.

Qualitative Issues for Future Employment Land Supply in West Cumbria

- At a quantitative level there appears to be adequate supply of employment land. However it is essential to consider whether there are enough sites which meet the requirements of the broad use classes and key sectors within the overall supply. In order to meet economic objectives it is essential that West Cumbria can supply adequate sites and premises for the following employment uses/sectors in particular:
 - Offices (B1) - especially financial and professional services
 - Nuclear - especially R&D (B1b and c) and high bay industrial units (B2 or B8)
 - Logistics/warehousing (B8)
- Following on from the above and in order to retain short and longer term flexibility within the employment land supply we would recommend that sites are only de-allocated where it is clear they will never be developed for employment use (e.g. due to location, development constraints or other factors) and/or where there is an alternative use which would generate benefits over and above employment uses
- It may be possible to accommodate some requirements through “landless growth”. Although opportunities for this are less limited in rural than in urban areas, there is some scope:

- Developers (public and private) should be directed to opportunities in Workington and Whitehaven town centres, both conversions and new build, which will add to supply but potentially require less land take due to opportunities for 'landless' provision and higher density development. In rural areas there may be scope for conversion of under used and disused rural buildings to provide rural workshops and managed workspace
- In rural areas home working is a growing trend particularly for office based businesses and some workshop based businesses
- It will be important to maintain a geographic spread of employment opportunities, particularly in view of the rural nature of West Cumbria and accessibility and transport issues. Although the key concentrations are likely to remain at Lillyhall and Westlakes Science and Technology Park, as well as in the town centres, consideration needs to be given to:
 - Ensuring there is adequate employment space in isolated rural settlements
 - Ensuring alternative employment opportunities are provided in locations which will be hit hardest by job losses at Sellafield, e.g. Cleator Moor and Egremont
- The local authorities must ensure provision of a range of available sites and premises which can meet all aspects of occupier and developer demand. This will require a range of sizes, types and locations and is likely to require continued public investment to ensure sites are market ready
- A strong message which has emerged from this study is the lack of quality premises across all uses in West Cumbria. Where quality supply has been provided market demand has tended to follow, indicating stronger demand for good quality. Provision of better quality premises will also be a key factor in supporting economic restructuring in the area, especially if higher value occupiers are to be attracted in
- The delivery of quality premises is however hampered by values in West Cumbria. This means that public support is likely to continue to be required in all but the best locations

6.21 These qualitative issues are considered further in the investment strategy and policy recommendations set out in Section 7.

7.0 Investment Strategy and Policy Recommendations

Introduction

- 7.1 The employment land portfolio should comprise a mix of sites appropriate to current and future demand of a range of occupiers whilst allowing a degree of flexibility. This assessment has considered both the quantitative and qualitative supply of employment sites in West Cumbria against current and forecast demand. It has found that there is an oversupply of land in quantitative terms and a huge variation in the quality and characteristics of sites. This section recommends the steps that should be taken to ensure the supply in West Cumbria meets demand.
- 7.2 There are two broad categories of intervention:
- Policy Interventions - to provide the framework for planning and economic development policy and align local, county and regional activity. These are split between cross cutting policy interventions and site based policy interventions
 - Site Specific Recommendations - relate to the categorisation of the sites and indicate approaches to improve the qualitative performance of sites and balance the overall portfolio of supply

Policy Interventions

- 7.3 The policy framework has a clear role to play in controlling the nature of supply. The following highlights key policy issues that should be addressed:

Cross Cutting Policy Interventions

- **Quality of environment** - the quality of the environment and public realm is a key factor that impacts upon market attractiveness of sites. A clear policy framework is required to raise the quality of public realm at specific sites and generally throughout industrial areas in order to enhance investor perceptions. The focus of environmental enhancements should be at the sites identified as priorities for investment and managements sites in the site based recommendations below
- **Quality of life** - the overall 'quality of life' offer is important in driving inward investment decisions. This encompasses a range of considerations from housing, education, leisure and cultural facilities. Providing a good quality of life offer is particularly important to attract high value and 'foot-loose' investors and employees in those sectors. West Cumbria's proximity to the Lake District National Park is a major attraction, but the availability of high quality housing and cultural facilities is more patchy. It is important to promote development of higher value housing at appropriate locations and enhance provision of cultural facilities in the Key Service Centres to enhance the overall West Cumbria offer and reduce the pressure on the hot-spots of demand (in and around Cockermouth and Egremont). The scope for enhancing quality of life should be considered in assessing alternative uses for employment sites

- **Quality of build** - the standard of construction and design that it is possible to achieve is limited by the rental value of employment premises. The prevailing low rental values across West Cumbria mean that it is difficult to deliver high specification premises without public sector support. This is a particular issue raised in relation to development at Westlakes Science and Technology Park
- **Home working** - it is difficult to predict the impact of home working on the demand for employment land and premises. However, statistics clearly show an increasing trend for home working over the past 10-15 years across the country, but particularly in rural areas. Policies should promote home working as it reduces pressure on land and transport infrastructure and is often associated with self-employment/entrepreneurship. Two key areas for consideration are live/work properties which provide both housing and workspace within one unit; and the provision of 'work hubs' with at a cluster (25 or more) of units and communal areas where workers can share facilities and business support services. Home working and live/work properties are likely to be particularly attractive in rural settlements in West Cumbria where accessibility is poor. The work hubs concept may be suited to Key Service Centres and other smaller settlements. Planning regulations need to be flexible to facilitate development or conversion for live/work and work hubs and avoid constraining opportunities by enforcing a strict separation between residential and business allocations
- **Promote alignment across public sector agencies** - there are various public and semi-public sector agencies that influence employment land in West Cumbria. Ensuring consistency across agencies is essential to avoid any potential conflict/duplication regarding the role of sites, their priority and/or proposals for investment. Allerdale and Copeland local authorities should seek to work proactively with West Lakes Renaissance to influence the strategy for their portfolios. The local authorities should also be lobbying Cumbria County Council as they redefine the categorisation of their sites to ensure it fits with their own priorities
- **Supporting business start-up and growth** - supporting growth and diversification of the economy through nurturing the emergence and growth of indigenous businesses and attracting inward investment is a key policy objective. Ensuring the availability of appropriate accommodation and facilities is an essential aspect of the overall business and enterprise support package. Recent trends indicate demand for managed workspace which offers communal facilities
- **Supporting nuclear sector** - West Cumbria is the UK's most important location for nuclear and related advanced engineering, accounting for around a third of the UK's civil nuclear sector. The nuclear industry provides around 40% of West Cumbria's GVA. The Energy Coast Masterplan seeks to build on West Cumbria's nuclear assets and its technology and research strengths to make the area globally recognised as a leading nuclear, energy, environment and related technology business cluster. Allerdale and Copeland local authorities must ensure that the employment land and premises portfolio meets the needs of nuclear sector in order to support this policy and facilitate the growth of the sector. Take up of premises by nuclear related firms has averaged at 2,300 sq m per annum. It will be important for the authorities to monitor the rate, specification and location of take-up in order to respond to the dynamic demands of nuclear related businesses

Site Based Policy Interventions

- **De-allocation** - sites that are very poor quality and/or better suited to alternative uses should be de-allocated in order to reduce the quantitative oversupply and allow resources to be focused on sites that are better prospects. However as noted in existing policy this must not be to the detriment of the overall portfolio of supply
- **Loss of employment land** - a significant amount of employment land has been lost through the gradual closure of the Rhodia plant and there is a threat of further losses as businesses close or relocate (i.e. Sekers and Alcan). Sites in employment use are provided some protection in policy, however, there may be a need to respond more proactively to sites as they arise through negotiations with owners/agents and preparation of supplementary planning documents or development briefs to clearly establish the parameters for redevelopment. The opportunities to retain the sites in employment use through refurbishment/reconfiguration of space should be considered (see below) alongside the scope for alternative uses to enhance the overall quality of life in the area (as noted above)
- **Refurbishment/reconfiguration** - a significant amount of demand in West Cumbria is for good quality small/medium sized workspace. Units that are adaptable to meet the changing requirements of occupiers and are available on flexible terms are particularly attractive to small and start-up businesses and are therefore important to encourage entrepreneurship and meet the needs of nuclear supply chain companies (which tend to be small scale). Some of the existing employment stock is too large or outdated to meet the demand of occupiers. The public sector should support refurbishment and reconfiguration of such premises through policy and funding
- **Town centre office accommodation** - the lack of office accommodation in the town centres is a particular weakness in the existing employment portfolio. Enhancing the availability of quality office accommodation in the key town centres (Whitehaven, Workington and Maryport) through encouraging refurbishment/conversion of town centre premises will be important to respond to the predicted increase in demand for town centre locations over and above business park locations. It will be important to monitor the types of use being developed on the town centre 'mixed use' allocation sites to ensure that an appropriate balance is being struck
- Specific interventions by site or category (as identified above)

Site Specific Recommendations

- 7.4 The following section sets out the site specific recommendations. Table 7.1 below sets out the intervention principles used as the basis for categorising each site. The remainder of this section lists the sites included in each category providing a brief description/justification.

Table 7.1 Site Based Intervention Principles

Category	Description
Priority	Sites that should be the focus of investment to ensure they are bought forward for development due to their significance to economic growth and sustainability
Retain	There are four sub-categories:
Management	Sites that do not require significant investment but should remain allocated for employment use as they form part of a satisfactorily performing industrial estates/business parks and/or are important to local economic sustainability of Key Service Centres

Category	Description
Town centre	Sites in and around town centres which are allocated for mixed use and have potential for employment use ¹
Consider alternatives	Sites that could be developed for employment use, but may also have potential for other forms of development. Proposals for non-employment development should therefore be considered on their merits and in the context of overall regeneration proposals for the wider area
De-allocate	Sites should be considered for de-allocation (in whole or part) as they do not perform well on the qualitative indicators and/or do not provide a specific role that would warrant retention

Note: With the exception of Maryport Harbour all sites under this category relate to Whitehaven town centre

Priority Investment Sites

- 7.5 There are 11 priority investment sites, five sites within Lillyhall plus six other sites. Each is described below.

Table 7.2 Priority Investment Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
All 2C	Derwent Howe 2/170	75%	0.37
All 1D	Lillyhall (sites)2/010 D	74%	18.00
All 1E	Lillyhall (sites)2/010 E	73%	8.77
C1	West Lakes S & T Pk	73%	35.58
All 13	Port of Workington	71%	6.00
All 2A	Derwent Howe 2/011	71%	1.54
All 1C	Lillyhall (sites)2/010 C	70%	22.05
All 1B	Lillyhall (sites)2/010 B	68%	1.32
All 1A	Lillyhall (sites)2/010 A	67%	8.86
C7	Bridge End Extension	66%	2.90
C8	Leconfield	65%	2.47
			107.86

Lillyhall

- 7.6 Lillyhall is the largest site in West Cumbria and makes the largest single contribution to the existing supply (over 50 ha). Each quadrant has distinct characteristics and therefore scores awarded in the qualitative assessment vary (between 67-73%). The sites generally score poorly on the sustainability criteria as they are Greenfield and distant from centres of population. However, Lillyhall is amongst the most attractive in market terms and accounts for the largest amount of pipeline development in West Cumbria (with the exception of Sellafield). It has also benefitted from significant investment from public and private sectors over recent years and provides the market with something that is not offered elsewhere in the employment land portfolio. With regard to this, the scale of development already completed and the scale of opportunity remaining, it is important that the development of Lillyhall is supported to allow it to generate critical mass and become more sustainable and self sufficient.
- 7.7 It is acknowledged that consideration has been given to de-allocation of Lillyhall North in the past, however in view of current market interest of Northern Developments Ltd (who are preparing a planning application for the site), the need to generate critical mass, and the gateway position of this site at the gateway to Lillyhall, it is recommended that this allocation is retained. The potential to retain this site for a single large scale user has been noted in the past. However, as there is no guarantee that such a requirement will materialise in the foreseeable future and given the gateway

location of the site, it is not considered appropriate to restrict development to a single user. However, it is important to ensure the scale and design of development on this site reflects the high profile, gateway location (i.e. large scale, high density and good design quality).

- 7.8 The development of the masterplan for Lillyhall will be an important tool for guiding the future development of the site. Whilst the importance of generating critical mass is acknowledged residential uses are not considered to be appropriate as part of the overall mix of uses. It is important that existing employment uses adjacent to Lillyhall are considered as an integral part of the future development to ensure they contribute effectively to the overall offer. This is likely to include a range of specific interventions such as access improvements, facade enhancements and capitalising upon redevelopment opportunities. One such redevelopment opportunity is provided by the closure of Alcan to the south of Lillyhall. This is a very large scale, high profile site which should be protected for commercial use to contribute towards the overall offer provided by Lillyhall.
- 7.9 It is essential that there is clear differentiation between roles of Lillyhall and Westlakes Science and Technology Park. The sites should seek to adopt complementary role and avoid potentially competing for prospective occupiers. In order to achieve this, Westlakes Science and Technology Park should continue to be the focus for knowledge based industries (especially those related to the nuclear sector). Lillyhall is better placed to cater for a broader mix of employment uses and occupiers that require larger format premises.
- 7.10 Defining Lillyhall as the location for skills development and Westlakes Science and Technology Park as the location for research activity would fit with the spatial interpretation of the Energy Coast skills and research agenda and the exiting occupiers on either site (i.e. Lillyhall being the home of West Cumbria College and the proposed Energus facility and Westlakes Science and Technology Park being the home of the Graduate Research Centre, Nuclear Decommissioning Agency and having links with several universities).
- 7.11 The availability of large development platforms is a positive feature of Lillyhall and an important element of the overall offer within West Cumbria. It is important that Lillyhall does not become focus for smaller scale developments that could be better located in other employment locations such as Derwent Howe. This would risk undermining the primary role of Lillyhall as a strategic employment location and threaten the viability and sustainability of other employment locations. We would recommend that in preparing the masterplan for Lillyhall consideration is given to providing a guide figure for minimum size of development platforms

Westlakes Science and Technology Park

- 7.12 Westlakes Science and Technology Park comprises of two main elements; the existing business park and undeveloped serviced parcels or land; and additional land allocated to the north and south. The site is one of the most significant employment sites in West Cumbria, in terms of the role it plays in the local economy and the availability of land (c.8 ha in the serviced parcels plus 19 ha in additional allocations).
- 7.13 Westlakes Science and Technology Park scores well in terms of market demand and strategic planning, but poorly in relation to sustainability due to its accessibility (reliance on car) and green field status. There is unlikely to be a requirement for investment in infrastructure in the short-

medium term as there is a significant supply of serviced land available. However, some investment would be required to release extension land (in particular in relation to improving access from the A596). There also appears to be a continued requirement for gap funding to make speculative development feasible within Westlakes Science and Technology Park, in particular to meet the high design and environmental specifications sought.

- 7.14 As noted under Lillyhall (above) there is a need to differentiate between the role of Westlakes Science and Technology Park and Lillyhall. The key point of differentiation is to retain Westlakes Science and Technology Park's focus on knowledge based (and in particular nuclear) sector.

Bridge End Extension

- 7.15 This site would extend the existing Bridge End Industrial on the edge of Egremont. The site is already the subject of investment from NWDA. Despite the site's topography and green field status it is considered as a priority for investment as it will build on the success of the existing industrial estate and expand local availability of employment land in a key service centre. Bridge End may also potentially cater for nuclear based industries.

Port of Workington

- 7.16 This categorisation of port related sites as high priority is in line with the Regional Spatial Strategy, Regional Economic Strategy and reflects the Port Investment Plan.

Derwent Howe (part)

- 7.17 Derwent Howe is a key employment corridor to the south of west of Workington. Two sites in Derwent Howe are categorised priorities for investment (much of the remainder is categorised as sites for ongoing management). These sites have good frontage on Solway Road but require investment to address potential ground conditions.

Leconfield

- 7.18 Leconfield Industrial Estate suffers from low demand, however, this is understood to be due (at least in part) to the large format of premises available. Consultations have suggested that there may be demand for smaller format premises at this location. There may be scope to meet demand more accurately by investing in redevelopment, reconfiguration and refurbishment. Non-employment uses may be acceptable on part of the site in order to facilitate such investment. It is understood that discussions are progressing with Northern Developments Ltd and Space North West to this end.

Management Sites

- 7.19 The majority of the sites categorised as 'management sites' are within existing industrial areas, they provide scope for future expansion/development but do not require particular investment. A significant proportion of these sites are located in or adjacent to Key Service Centres. The sites in Key Service Centres tend to be relatively small sites with limited market attractiveness, no pipeline development and as a result many score poorly in the qualitative assessment. However, the sites

have an important role in promoting local economic sustainability through providing opportunities for existing business to expand or in providing land/premises for new investment. Further explanation regarding two key sites in this category - Whitehaven Commercial Park and Mainsgate Road Extension Millom is provided below.

Table 7.3 Management Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C6	Bridge End Ind Park	78%	5.40
All 5	Lakeland Business Pk	71%	0.70
C3	Sneckyeat Road	68%	4.85
All 12	Oldside	63%	8.00
C5	Haig Enterprise Park	63%	0.20
All 6	Derwent Mills	63%	1.34
All 4	Dovenby Hall	62%	0.00
All 21	Syke Road	62%	0.33
C30	Rear Main St	59%	0.88
All 19	Aspatia Business Pk, Park Road	58%	2.52
All 10	Rise Howe Ind Est	55%	0.53
C11	Frizington Rd	55%	1.47
C2	Whitehaven Commercial Pk	54%	17.90
All 23	Silloth Harbour	53%	0.16
All 7	Low Road	53%	1.02
C31	Market Square	50%	0.18
C15	Devonshire Road (E11)	46%	3.00
All 8	East Causeway Head, Silloth Airfield	45%	1.80
All 9	St Helens Business Pk	43%	1.30
C12	Cross Lane	43%	0.73
C16	Mainsgate Road Ext	35%	2.34
			54.65

Whitehaven Commercial Park

7.20 Despite receiving significant public sector investment in servicing and infrastructure, Whitehaven Commercial Park attracts little demand from potential occupiers. Its relatively remote location is often cited as the key detracting factor. The site is the third largest in West Cumbria in terms of available remaining supply (after Lillyhall and Westlakes Science and Technology Park¹²) and therefore has the potential to significantly influence the employment land portfolio.

7.21 The site is categorised as a management site as there is no requirement for investment as a priority to bring it forward for development, however, a proactive approach to management should be adopted, focussing on reinvigorating marketing activity and repositioning it to target general industrial occupiers.

Mainsgate Road Extension Millom

7.22 This site is the only accessible via the existing book repository (which is a key local employer) and provides potential for the business to expand. It therefore should be retained as a management site.

¹² Excluding Maryport Harbour as it is a mixed use site

Town Centre Sites

- 7.23 All but one of the town centre sites identified for inclusion in this study are in Whitehaven (the exception being Maryport harbour). These sites tend to perform well on the qualitative assessment but despite being potentially well suited to employment use, all of these are allocated for mixed use development and may also be suited to other uses such as residential, retail and leisure/tourism.
- 7.24 The lack of modern office space in main town centres (and in particular Whitehaven) was highlighted as an issue in consultations throughout this assessment. These sites may have potential to address this deficiency, however the relative merits of potential uses should be considered as sites come forward for development and as part of an overall vision for the town centre. For example, the sites closest to the marina (Bus Station and Old Garage and Quay Street Car Park) may be more suited to tourism related uses, sites nearer the core of the town centre may be suited to office uses whereas sites that are on edge of the town centre towards Pow Beck are likely to be more suited to light industrial employment use.
- 7.25 It is important to note that there may be sites with similar issues in Workington and Maryport, however, none were identified to be included in this study.

Table 7.4 Town Centre Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C23	Bus Station and Garage	78%	0.35
C22	Bus Depot and Old garage (WTC4)	78%	0.18
C21	Quay Street Car Pk	74%	0.30
C28	BT Depot	68%	0.90
All 22	Maryport Harbour	68%	17.94
C26	Jacksons Timber Yd	63%	0.47
C29	Coach Rd	63%	0.63
C24	Albion St (N)	61%	0.27
C25	Albion St (S)	61%	0.22
C27	Preston St	58%	0.45
			21.65

Consider Alternatives

- 7.26 Within this category are a number of sites that are suited to employment use, but other uses may also be appropriate. It is recommended that they are retained as employment sites to allow for flexibility and choice within the employment portfolio. However should proposals for alternative uses be forthcoming they should be considered on their merits. The key sites of note within this category are:

Table 7.5 Consider Alternatives Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
C14	Pow Beck	69%	8.24
All 14	Former Goods Yd, Derwent Howe	66%	2.50
All 11A	Dock Road 2/124	63%	0.80
All 2B	Derwent Howe 2/152	63%	4.50
All 11B	Dock Road 2/154	60%	2.00
All 3	Main Rd/Hutton Place sites (south of Glasson)	57%	4.80
C10	Cleator Mills	48%	2.76
			25.60

- Pow Beck - two sites within the Pow Beck development brief are earmarked for employment uses. Although employment uses may be appropriate, a flexible approach should be retained to land use on these sites to facilitate wider Pow Beck scheme
- Former Goods Yard, Derwent Howe - this site is the subject of proposals for a transport interchange
- Dock Road, Derwent Howe - these sites occupy a gateway position in Derwent Howe and Port of Workington. Some land assembly may be required to make development feasible and whilst they may be appropriate for employment use, other forms of commercial development may also be appropriate to raise the profile of this location
- Derwent Howe (2/152) - this site is on the western edge of Derwent Howe and is constrained by topography (raised above adjacent land) and poor access. Non employment uses which address these constraints should be considered
- Main Rd/Hutton Place sites (south of Glasson) - there are two parcels of land within this site, the northern parcel is the former coal wash site which may be suitable for employment or other commercial use, the southern parcel may be suited to soft landscaping as a temporary use to improve the appearance of this gateway site in the short-medium term as part of Destination Maryport initiative
- Cleator Mills - is subject to proposals for mixed use development

Deallocate

- 7.27 Ten sites are suggested for de-allocation (four of these are de-allocated in the Copeland Local Plan. The sites score poorly on the qualitative assessment (8 score below 50% and those that score above have form proposals for alternative uses). The cumulative size of the sites is relatively small in relation to the overall level of oversupply - the amount of remaining land in these sites is under 22ha. The reasons for de-allocation varies, and are summarised for key sites below:

Table 7.6 Deallocation Sites

Ref	Category/Site	Overall Qualitative Score	Total available supply (Ha)
All 16	St Helens (opp Dunmail)	61%	0.40
C19	Station Yard	48%	1.46
C4	Red Lonning	48%	1.89
C13	Beckermest Industrial Estate	45%	2.57
C18	Furnace Row	38%	4.20
C20	Rowrah Station Yard Ext	38%	0.86
C17	Millom Pier	32%	3.00
C9	Leconfield Extension	32%	5.28
All 17	Moor Rd	29%	0.95
			20.61

- St Helens - northern edge of built up area, not providing any unique offer
- Station Yard - allocation deleted from Local Plan. Development potential constrained by linear shape and poor access (hump back bridge). There is a current application for residential development

- Red Lonning - poorly scoring site due to limited market interest, configuration restricting development potential and likely requirement for significant investment in site preparation. Potential for residential use as located between two sites allocated for housing
- Beckermest Industrial Estate - allocation deleted from Local Plan. Development potential severely constrained by remote location, very poor access (via unmade track in part) and topography
- Furnace Row - allocation deleted from Local Plan. Although close to Lillyhall the site is poorly related to it. It is a greenfield site adjacent to housing uses with constrained access
- Rowrah Station Yard - allocation deleted from Local Plan. In use as garden centre
- Millom Pier - allocation deleted from Local Plan. Constrained by environmental designations
- Leconfield Extension - greenfield site, development potential constrained by topography. Priority should be given to reconfiguration/redevelopment of the main industrial estate
- Moor Road - greenfield site at the edge of the settlement, limited development potential likely requirement for significant investment to improve access

Fit with Energy Coast Masterplan

7.28 Table 7.7 shows that the recommendations made in this section broadly correlate with those made in the Energy Coast Masterplan.

- Westlakes Science and Technology Park, Lillyhall, Leconfield and Bridge End are considered priority sites in both (the latter being short term priorities in the Energy Coast Masterplan)
- Whitehaven Commercial Park is considered a short term priority in the Energy Coast Masterplan. This study categorises it as a management site, but places an emphasis upon reinvigorating marketing activity and repositioning it to target general industrial occupiers

Table 7.7 Fit with Energy Coast Masterplan

Energy Coast Categorisation	Employment Land and Premises					
	Priority	Management	Town Centre	Key Service Centre	Consider Alternatives	De-allocate
Priority sites						
Westlakes Science and Technology Park	x					
Lillyhall	x					
Short Term Priorities						
Leconfield	x					
Bridge End	x					
Whitehaven Commercial Park		x				
Medium Priority						
Derwent Howe	x	x				
Docks Road area	x					
Glasson					x	
Pow Beck					x	
Derwent Forest*						
Other						

Energy Coast Categorisation	Employment Land and Premises					
	Priority	Management	Town Centre	Key Service Centre	Consider Alternatives	De- allocate
Cleator Mills						
Devonshire Road, Millom		x			x	

Note: * not considered in this study as it is proposed for tourism not employment use

Overall Quantum

- 7.29 The sites considered in this Employment Land and Premises Study would provide nearly 210 ha of employment land.

Table 7.8 Available Land by Category

Category	Total available supply (Ha)
Priority	107.86
Retain	
Management	54.65
Town centre	21.65
Consider alternatives	25.60
De-allocate	20.61
Total (excluding de-allocations)	209.76

Overall Mix

- 7.30 The following table highlights the use classes most suited to the key sites. The objective is to demonstrate that the portfolio of sites provides a balanced mix of land that will meet the requirements of various sectors. This list is not intended to be exhaustive (not all sites are listed) or exclusive (other forms of development may be acceptable on the sites listed).

Table 7.9 Available Land by Category

Use Class	Key Sites
B1 (a) Office	Town Centre sites Lakeland Business Park
B1 (b) research and development	Westlakes Science and Technology Park
B1 (c) light industrial	Lillyhall (large scale occupiers) Leconfield Bridge End Extension Derwent Howe Key Service Centre Sites
B2 General industrial	Whitehaven Commercial Park Lillyhall (large scale occupiers) Powbeck Derwent Howe
B8	Lillyhall
Port related	Port of Workington Oldside

- 7.31 Some use classes are less location sensitive than others and could in theory be developed out on a number of different sites. This is particularly the case for small scale, light industrial uses. Whereas the location choices of other uses may be more restricted by physical constraints and policy issues. For example office developments require proximity to population centres and/or transport nodes and large scale developments require large floor plates. It is therefore important to ensure that sufficient land is identified to meet requirements of the more location sensitive uses and achieve sustainable development. However, this must be balanced against providing flexibility and choice to the market place.
- 7.32 This issue is most pertinent to Lillyhall, which due to its large scale could in theory accommodate a wide range of uses. The discussion above has highlighted two important issues regarding the future development of Lillyhall which should be considered in preparing the masterplan for this site:
- i. the need to differentiate the roles of West Lakes Science and Technology Park and Lillyhall, with Westlakes Science and Technology Park being the focus for knowledge based industries (especially those related to the nuclear sector) and Lillyhall catering for a broader mix of employment uses and occupiers that require larger format premises
 - ii. the desirability for Lillyhall to be the focus for larger scale occupiers (rather than sites being sub-divided or incrementally developed for small scales uses) to ensure sites are retained for large scale uses in Lillyhall and reduce the potential for Lillyhall to draw potential occupiers away from other locations, especially regeneration priority areas such as Derwent Howe



Appendix A
Example Site Proforma

Site/Premises Assessment Proforma

General Information:

Site Reference No.		UDP Allocation	
Site/Premises Name		Last known use	
Geographical Reference/Postcode		Size of Site/Premises (ha/sq m)	
Ward		Marketing position	
Description			

Market Attractiveness factors		Score	Notes
Ownership	Single public ownership - 5 Single private owner seeking employment development - 4 Single private ownership not seeking employment development - 2 Multiple private ownerships -1		
Availability	Immediately available - 5 Available in 1-3 years - 4 Available in 3-5 years - 2 Available in 5-10 years - 1		
Market Activity/ Developer Interest	Recent high levels of interest - 5 Moderate/somewhat historic interest - 3 Minimal or historic interest - 1		
Suitability for Growth Sectors	Very suitable for several growth sectors - 5 Very suitable for one sector or moderately suitable for several sectors - 3 Limited suitability to any growth sector - 1		
Development Constraints	No significant constraints - 5 1 or 2 moderate constraints - 3 A number of significant constraints - 1		
Need for Investment	No public investment required - 5 Some investment required/source identified - 4 Some investment required/source unidentified - 3 Major investment required/source identified - 2 Major investment required/source unidentified - 1		
Viability	Highly viable - 5 Moderately viable - 3 Marginal viability - 1 Unviable - 0		

Market Attractiveness factors		Score	Notes
Accessibility	Good - 5 Moderate - 3 Poor - 1		
Site/Premises Condition	Good - 5 Moderate - 3 Poor - 1		
Quality of Surrounding Environment	Good - 5 Moderate - 3 Poor - 1		
Market Attractiveness Total		/50	
Proposed Use			

Sustainable Development Factors		Score	Notes
Location	Town Centre - 5 Edge of Centre - 4 Other urban - 3 Smaller settlement - 2 Rural - 1		
Previously Developed/ Greenfield	Entirely previously developed - 5 Partly previously developed - 3 Entirely Greenfield - 0		
Public Transport Accessibility	Highly Accessibly - 5 Moderately Accessible - 3 Limited accessibility - 1		
Accessibility on foot and bicycle	Accessible to large population - 5 Accessible to moderate population - 3 Accessible to minimal population - 1		
Impact on Environment/ Biodiversity	Negligible impact - 5 Moderate impact - 3 High Impact - 0		
Suitability for employment development	Very suitable - 5 Moderately suitable - 3 Unsuitable - 0		
Suitability & benefits of other uses	Unsuitable or no benefits - 5 Moderately suitable/some benefits - 3 Very suitable/significant potential benefits - 1		
Sustainable Development Total		/35	

Strategic Planning Factors		Score	Notes
Planning Context	Extant planning permission for employment development - 5 Employment allocation without planning permission - 4 Unallocated site within PEZ - 3 Unallocated site in Mixed use area - 2 Unallocated site - 1		
Assisted Area Status	Yes - 5 No - 0		
Importance to RSS/RES delivery	Highly relevant to several RSS/RES objectives - 5 Moderate relevance RSS/RES objectives - 3 Limited relevance to RSS/RES objectives - 1		
Specific user/use	Specific user/use identified & committed - 5 Specific user/use identified & not committed - 3 No specific user/use identified - 1		
Regeneration/ development proposals	Site part of key regeneration proposal & required for employment development - 5 Peripheral element of regeneration proposal - 3 Site not part of any regeneration proposal - 1		
Importance to Economic Development Activities	Highly important - 5 Moderately Important - 3 Of little importance - 1		
Neighbouring Uses	High compatible - 5 Moderately compatible - 3 Incompatible - 1		
Strategic Planning Total		/35	
Grand Total		/120	



Appendix B
Qualitative Site Assessment Database

Ref	Site Name	Town	LA	A: Site Area (Total)	B: Under construction	C: With planning permission	D: Remaining available land	D: Total Available Supply (C+D)
C23	Bus Station and Garage	Whitehaven	Copeland	0.35	0.00	0.00	0.28	0.28
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	0.18	0.00	0.00	0.18	0.18
C6	Bridge End Ind Park	Egremont	Copeland	5.40	0.00	0.00	5.40	5.40
AII 2C	Derwent Howe 2/170		Allerdale	0.37	0.37	0.00	0.00	0.37
C21	Quay Street Car Pk	Whitehaven	Copeland	0.30	0.00	0.00	0.30	0.30
AII 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	18.00	0.00	0.00	18.00	18.00
C1	West Lakes S & T Pk		Copeland	50.96	0	16.46	19.12	35.58
AII 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	9.24	2.42	0.77	5.58	8.77
AII 5	Lakeland Business Pk	Cockermouth	Allerdale	4.11	0.00	0.00	0.70	0.70
AII 2A	Derwent Howe 2/011		Allerdale	14.35	0.00	0.00	1.54	1.54
AII 13	Port of Workington		Allerdale	7.00	0.00	0.00	6.00	6.00
AII 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	24.30	1.66	3.53	16.86	22.05
C14	Pow Beck	Whitehaven	Copeland	8.24	0.00	0.00	8.24	8.24
AII 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	6.00	0.00	0.59	0.73	1.32
C3	Sneckyeat Road	Whitehaven	Copeland	4.85	0.00	0.00	4.85	4.85
C28	BT Depot	Whitehaven	Copeland	0.90	0.00	0.00	0.90	0.90
AII 22	Maryport Harbour	Maryport	Allerdale	17.94	0.00	0.00	17.94	17.94
AII 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	12.75	0.00	1.08	7.78	8.86
C7	Bridge End Extension	Egremont	Copeland	2.90	0.00	0.00	2.90	2.90
AII 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	2.50	0.00	0.00	2.50	2.50
C8	Leconfield	Cleator Moor	Copeland	15.19	0.00	0.00	2.47	2.47
C26	Jacksons Timber Yd	Whitehaven	Copeland	0.47	0.00	0.00	0.47	0.47
C25	Albion St (S)	Whitehaven	Copeland	0.22	0.00	0.00	0.23	0.23
C24	Albion St (N)	Whitehaven	Copeland	0.27	0.00	0.00	0.27	0.27
AII 6	Derwent Mills	Cockermouth	Allerdale	2.54	0.00	1.34	0.00	1.34
AII 2B	Derwent Howe 2/152		Allerdale	4.50	0.00	1.82	2.68	4.50
AII 11A	Dock Road 2/124	Workington	Allerdale	0.80	0.00	0.80	0.00	0.80
C5	Haig Enterprise Park	Whitehaven	Copeland	2.71	0.00	0.00	0.20	0.20
C29	Coach Rd	Whitehaven	Copeland	0.63	0.00	0.00	0.63	0.63
AII 12	Oldside	Workington	Allerdale	8.00	0.00	0.00	8.00	8.00
AII 4	Dovenby Hall		Allerdale	★	★	★	★	★
AII 21	Syke Road	Wigton	Allerdale	2.28	0.00	0.00	0.33	0.33
AII 16	St Helens (opp Dunmail)	Siddick	Allerdale	4.64	0.00	0.00	0.40	0.40
AII 11B	Dock Road 2/154		Allerdale	2.00	0.00	0.00	2.00	2.00
C30	Rear Main St	Egremont	Copeland	0.88	0.00	0.00	0.88	0.88
C27	Preston St	Whitehaven	Copeland	0.45	0.00	0.00	0.45	0.45
AII 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	3.40	0.00	0.00	2.52	2.52
AII 3	Glasson Ind Est	Maryport	Allerdale	5.74	0.00	0.00	4.80	4.80
C31	Market Square	Cleator Moor	Copeland	0.18	0.00	0.00	0.18	0.18
C11	Frizington Rd	Frizington	Copeland	1.47	0.00	0.00	1.47	1.47
AII 10	Rise Howe Ind Est	Flimby	Allerdale	8.47	0.00	0.00	0.53	0.53
C2	Whitehaven Commercial Pk		Copeland	17.90	0.00	0.00	17.90	17.90
AII 23	Silloth Harbour	Silloth	Allerdale	0.88	0.00	0.16	0.00	0.16
AII 7	Low Road	Cockermouth	Allerdale	2.32	0.00	0.00	1.02	1.02
C10	Cleator Mills	Cleator	Copeland	2.76	0.00	0.00	2.76	2.76
C4	Red Lonning	Whitehaven	Copeland	1.89	0.00	0.00	1.89	1.89
C19	Station Yard	Moor Row	Copeland	1.46	0.00	0.00	1.46	1.46
C15	Devonshire Road (E11)	Millom	Copeland	3.00	0.00	0.00	3.00	3.00
C13	Beckermest Industrial Estate		Copeland	7.25	0.00	0.00	2.57	2.57
AII 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	1.80	0.00	0.00	1.80	1.80
C12	Cross Lane	Seascale	Copeland	1.41	0.00	0.00	0.73	0.73
AII 9	St Helens Business Pk	Flimby	Allerdale	3.30	0.00	0.00	1.30	1.30
C18	Furnace Row	Distington	Copeland	4.20	0.00	0.00	4.20	4.20
C20	Rowrah Station Yard Ext		Copeland	0.86	0.00	0.00	0.86	0.86
C16	Mainsgate Road Ext	Millom	Copeland	2.34	0.00	0.00	2.34	2.34
C9	Leconfield Extension	Cleator Moor	Copeland	5.28	0.00	0.00	5.28	5.28
C17	Millom Pier	Millom	Copeland	3.00	0.00	0.00	3.00	3.00
AII 17	Moor Rd	Great Clifton	Allerdale	0.95	0.00	0.00	0.95	0.95
AII 19	Annie Pit Lane (complete)	Workington	Allerdale	1.00	0.00	0.00	0.00	0.00
AII 15	Plot D Reedland Rd (complete)		Allerdale	0.22	0.00	0.00	0.00	0.00
★	Information not available							

Ref	Site Name	Town	LA	Ownership	Availability	Market Activity / Developer Interest	Suitability for Growth	Development Constraints	Need for Investment	Viability	Accessibility	Site /premise condition	Quality of Surrounding Env	Market Attractiveness Total Poss 50	Market Attractiveness % Score	Market Attractiveness RANK
C23	Bus Station and Garage	Whitehaven	Copeland	2	5	5	3	3	3	4	4	3	3	35	70%	14
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	2	5	4	3	5	4	5	4	1	4	37	74%	7
C6	Bridge End Ind Park	Egremont	Copeland	4	4	5	3	4	5	4	3	5	3	40	80%	4
AII 2C	Derwent Howe 2/170		Allerdale	3	4	4	3	4	5	4	3	3	3	36	72%	11
C21	Quay Street Car Pk	Whitehaven	Copeland	2	4	1	3	5	5	4	4	3	5	36	72%	11
AII 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	5	5	5	3	3	5	3	5	3	4	41	82%	3
C1	West Lakes S & T Pk		Copeland	5	4	3	3	4	4	4	5	5	5	42	84%	2
AII 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	5	5	5	3	3	5	3	5	3	3	40	80%	4
AII 5	Lakeland Business Pk	Cockermouth	Allerdale	5	5	5	3	5	5	5	4	5	5	47	94%	1
AII 2A	Derwent Howe 2/011		Allerdale	5	4	3	3	2	5	4	3	3	3	35	70%	14
AII 13	Port of Workington		Allerdale	5	2	1	3	1	2	3	5	3	1	26	52%	32
AII 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	4	5	3	4	3	3	3	5	3	4	37	74%	7
C14	Pow Beck	Whitehaven	Copeland	1	4	3	2	2	3	3	3	2	3	26	52%	32
AII 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	4	5	5	1	3	5	3	5	3	3	37	74%	7
C3	Sneckyeat Road	Whitehaven	Copeland	4	5	1	1	4	5	3	3	5	3	34	68%	18
C28	BT Depot	Whitehaven	Copeland	4	4	1	1	2	5	3	4	3	1	28	56%	28
AII 22	Maryport Harbour	Maryport	Allerdale	5	4	3	2	5	5	2	2	3	3	34	68%	18
AII 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	1	5	3	2	3	5	3	5	4	4	35	70%	14
C7	Bridge End Extension	Egremont	Copeland	5	4	1	3	3	4	2	3	3	3	31	62%	21
AII 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	5	1	1	3	1	1	3	4	2	2	23	46%	43
C8	Leconfield	Cleator Moor	Copeland	4	5	1	1	5	5	1	1	5	1	29	58%	25
C26	Jacksons Timber Yd	Whitehaven	Copeland	1	1	2	2	3	1	3	4	2	3	22	44%	45
C25	Albion St (S)	Whitehaven	Copeland	3	2	1	1	2	1	3	4	1	3	21	42%	47
C24	Albion St (N)	Whitehaven	Copeland	3	2	1	1	2	1	3	4	1	3	21	42%	47
AII 6	Derwent Mills	Cockermouth	Allerdale	5	5	5	1	5	4	3	1	5	3	37	74%	7
AII 2B	Derwent Howe 2/152		Allerdale	5	4	3	3	2	3	2	3	3	2	30	60%	22
AII 11A	Dock Road 2/124	Workington	Allerdale	5	2	1	3	1	1	3	5	3	1	25	50%	35
C5	Haig Enterprise Park	Whitehaven	Copeland	4	5	5	1	3	★	5	1	3	3	30	60%	22
C29	Coach Rd	Whitehaven	Copeland	2	4	3	1	3	5	3	3	3	3	30	60%	22
AII 12	Oldside	Workington	Allerdale	4	1	3	3	1	3	3	5	3	1	27	54%	30
AII 4	Dovenby Hall		Allerdale	4	5	3	3	5	5	3	3	3	5	39	78%	6
AII 21	Syke Road	Wigton	Allerdale	4	5	5	1	3	5	3	1	5	3	35	70%	14
AII 16	St Helens (opp Dunmail)	Siddick	Allerdale	5	4	1	3	5	5	3	4	3	3	36	72%	11
AII 11B	Dock Road 2/154		Allerdale	1	2	1	3	1	1	3	5	3	1	21	42%	47
C30	Rear Main St	Egremont	Copeland	1	4	1	3	3	3	2	3	2	3	25	50%	35
C27	Preston St	Whitehaven	Copeland	1	2	1	2	3	1	1	4	1	2	18	36%	53
AII 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	4	5	1	1	5	5	3	1	5	3	33	66%	20
AII 3	Glasson Ind Est	Maryport	Allerdale	3	2	1	1	3	4	1	3	3	2	23	46%	43
C31	Market Square	Cleator Moor	Copeland	2	5	1	1	5	5	2	1	2	3	27	54%	30
C11	Frizington Rd	Frizington	Copeland	4	5	1	1	3	3	3	1	5	3	29	58%	25
AII 10	Rise Howe Ind Est	Flimby	Allerdale	5	5	1	1	5	3	1	3	1	1	26	52%	32
C2	Whitehaven Commercial Pk		Copeland	5	5	1	1	3	5	1	1	3	3	28	56%	28
AII 23	Silloth Harbour	Silloth	Allerdale	2	5	1	1	5	5	1	1	3	1	25	50%	35
AII 7	Low Road	Cockermouth	Allerdale	2	1	2	1	5	5	3	2	3	5	29	58%	25
C10	Cleator Mills	Cleator	Copeland	2	2	1	1	3	3	2	1	5	5	25	50%	35
C4	Red Lonning	Whitehaven	Copeland	5	5	1	1	3	1	0	1	1	1	19	38%	52
C19	Station Yard	Moor Row	Copeland	2	5	1	1	3	5	0	1	2	4	24	48%	39
C15	Devonshire Road (E11)	Millom	Copeland	1	5	1	1	1	5	1	1	3	3	22	44%	45
C13	Beckermet Industrial Estate		Copeland	4	4	1	2	3	4	1	1	1	3	24	48%	39
AII 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	1	5	1	1	5	3	1	1	3	3	24	48%	39
C12	Cross Lane	Seascale	Copeland	2	1	1	3	5	3	2	1	3	3	24	48%	39
AII 9	St Helens Business Pk	Flimby	Allerdale	2	1	1	1	3	5	1	3	1	3	21	42%	47
C18	Furnace Row	Distington	Copeland	0	1	1	1	1	3	1	2	4	4	18	36%	53
C20	Rowrah Station Yard Ext		Copeland	2	1	1	1	5	0	0	1	5	4	20	40%	51
C16	Mainsgate Road Ext	Millom	Copeland	2	2	1	1	3	3	0	1	3	1	17	34%	55
C9	Leconfield Extension	Cleator Moor	Copeland	2	1	1	1	1	1	0	1	2	1	11	22%	58
C17	Millom Pier	Millom	Copeland	1	1	1	1	3	1	0	1	3	2	14	28%	57
AII 17	Moor Rd	Great Clifton	Allerdale	2	2	1	1	1	1	0	1	3	3	15	30%	56
AII 19	Annie Pit Lane (complete)	Workington	Allerdale											0	0%	59
AII 15	Plot D Reedland Rd (complete)		Allerdale											0	0%	59
★	Information not available															

Ref	Site Name	Town	LA	Overall Total Poss 120	Overall % Score	Overall rank	Category
C23	Bus Station and Garage	Whitehaven	Copeland	96	80%	1	T
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	95	79%	2	T
C6	Bridge End Ind Park	Egremont	Copeland	93	78%	3	M
All 2C	Derwent Howe 2/170		Allerdale	90	75%	4	P
C21	Quay Street Car Pk	Whitehaven	Copeland	89	74%	5	T
All 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	89	74%	5	P
C1	West Lakes S & T Pk		Copeland	87	73%	7	P
All 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	87	73%	7	P
All 5	Lakeland Business Pk	Cockermouth	Allerdale	85	71%	9	M
All 2A	Derwent Howe 2/011		Allerdale	85	71%	9	P
All 13	Port of Workington		Allerdale	85	71%	9	P
All 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	84	70%	12	P
C14	Pow Beck	Whitehaven	Copeland	83	69%	13	C
All 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	82	68%	14	P
C3	Snekyeat Road	Whitehaven	Copeland	81	68%	15	M
C28	BT Depot	Whitehaven	Copeland	81	68%	15	T
All 22	Maryport Harbour	Maryport	Allerdale	81	68%	15	T
All 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	80	67%	18	P
C7	Bridge End Extension	Egremont	Copeland	79	66%	19	P
All 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	79	66%	19	M
C8	Leconfield	Cleator Moor	Copeland	78	65%	21	P
C26	Jacksons Timber Yd	Whitehaven	Copeland	76	63%	22	T
C25	Albion St (S)	Whitehaven	Copeland	76	63%	22	T
C24	Albion St (N)	Whitehaven	Copeland	76	63%	22	T
All 6	Derwent Mills	Cockermouth	Allerdale	76	63%	22	M
All 2B	Derwent Howe 2/152		Allerdale	76	63%	22	C
All 11A	Dock Road 2/124	Workington	Allerdale	76	63%	22	C
C5	Haig Enterprise Park	Whitehaven	Copeland	75	63%	28	M
C29	Coach Rd	Whitehaven	Copeland	75	63%	28	T
All 12	Oldside	Workington	Allerdale	75	63%	28	M
All 4	Dovenby Hall		Allerdale	74	62%	31	M
All 21	Syke Road	Wigton	Allerdale	74	62%	31	M
All 16	St Helens (opp Dunmail)	Siddick	Allerdale	73	61%	33	D
All 11B	Dock Road 2/154		Allerdale	72	60%	34	C
C30	Rear Main St	Egremont	Copeland	71	59%	35	M
C27	Preston St	Whitehaven	Copeland	69	58%	36	T
All 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	69	58%	36	M
All 3	Glasson Ind Est	Maryport	Allerdale	68	57%	38	C
C31	Market Square	Cleator Moor	Copeland	67	56%	39	M
C11	Frizington Rd	Frizington	Copeland	66	55%	40	M
All 10	Rise Howe Ind Est	Flimby	Allerdale	66	55%	40	M
C2	Whitehaven Commercial Pk		Copeland	65	54%	42	M
All 23	Silloth Harbour	Silloth	Allerdale	64	53%	43	M
All 7	Low Road	Cockermouth	Allerdale	63	53%	44	M
C10	Cleator Mills	Cleator	Copeland	58	48%	45	C
C4	Red Lonning	Whitehaven	Copeland	57	48%	46	D
C19	Station Yard	Moor Row	Copeland	57	48%	46	D
C15	Devonshire Road (E11)	Millom	Copeland	55	46%	48	M
C13	Beckermat Industrial Estate		Copeland	54	45%	49	D
All 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	54	45%	49	M
C12	Cross Lane	Seascale	Copeland	52	43%	51	M
All 9	St Helens Business Pk	Flimby	Allerdale	52	43%	51	M
C18	Furnace Row	Distington	Copeland	46	38%	53	D
C20	Rowrah Station Yard Ext		Copeland	45	38%	54	D
C16	Mainsgate Road Ext	Millom	Copeland	42	35%	55	M
C9	Leconfield Extension	Cleator Moor	Copeland	38	32%	56	D
C17	Millom Pier	Millom	Copeland	38	32%	56	D
All 17	Moor Rd	Great Clifton	Allerdale	35	29%	58	D
All 19	Annie Pit Lane (complete)	Workington	Allerdale	0	0%	59	
All 15	Plot D Reedland Rd (complete)		Allerdale	0	0%	59	
★	Information not available						

Ref	Site Name	Town	LA	Market Attractiveness % Score	Sustainable Development % Score	Strategic Planning % Score	Overall % Score
C23	Bus Station and Garage	Whitehaven	Copeland	70%	91%	83%	80%
C22	Bus Depot and Old garage (WTC4)	Whitehaven	Copeland	74%	89%	77%	79%
C6	Bridge End Ind Park	Egremont	Copeland	80%	60%	91%	78%
AII 2C	Derwent Howe 2/170		Allerdale	72%	80%	74%	75%
C21	Quay Street Car Pk	Whitehaven	Copeland	72%	86%	66%	74%
AII 1D	Lillyhall (sites)2/010 D	Workington	Allerdale	82%	54%	83%	74%
C1	West Lakes S & T Pk		Copeland	84%	49%	80%	73%
AII 1E	Lillyhall (sites)2/010 E	Workington	Allerdale	80%	54%	80%	73%
AII 5	Lakeland Business Pk	Cockermouth	Allerdale	94%	57%	51%	71%
AII 2A	Derwent Howe 2/011		Allerdale	70%	71%	71%	71%
AII 13	Port of Workington		Allerdale	52%	83%	86%	71%
AII 1C	Lillyhall (sites)2/010 C	Workington	Allerdale	74%	54%	80%	70%
C14	Pow Beck	Whitehaven	Copeland	52%	86%	77%	69%
AII 1B	Lillyhall (sites)2/010 B	Workington	Allerdale	74%	54%	74%	68%
C3	Sneckyeat Road	Whitehaven	Copeland	68%	83%	51%	68%
C28	BT Depot	Whitehaven	Copeland	56%	77%	74%	68%
AII 22	Maryport Harbour	Maryport	Allerdale	68%	66%	69%	68%
AII 1A	Lillyhall (sites)2/010 A	Workington	Allerdale	70%	63%	66%	67%
C7	Bridge End Extension	Egremont	Copeland	62%	54%	83%	66%
AII 14	Former Goods Yd, Derwent Howe	Workington	Allerdale	46%	89%	71%	66%
C8	Leconfield	Cleator Moor	Copeland	58%	66%	74%	65%
C26	Jacksons Timber Yd	Whitehaven	Copeland	44%	83%	71%	63%
C25	Albion St (S)	Whitehaven	Copeland	42%	89%	69%	63%
C24	Albion St (N)	Whitehaven	Copeland	42%	89%	69%	63%
AII 6	Derwent Mills	Cockermouth	Allerdale	74%	57%	54%	63%
AII 2B	Derwent Howe 2/152		Allerdale	60%	57%	74%	63%
AII 11A	Dock Road 2/124	Workington	Allerdale	50%	71%	74%	63%
C5	Haig Enterprise Park	Whitehaven	Copeland	60%	69%	60%	63%
C29	Coach Rd	Whitehaven	Copeland	60%	71%	57%	63%
AII 12	Oldside	Workington	Allerdale	54%	69%	69%	63%
AII 4	Dovenby Hall		Allerdale	78%	49%	51%	62%
AII 21	Syke Road	Wigton	Allerdale	70%	57%	54%	62%
AII 16	St Helens (opp Dunmail)	Siddick	Allerdale	72%	60%	46%	61%
AII 11B	Dock Road 2/154		Allerdale	42%	71%	74%	60%
C30	Rear Main St	Egremont	Copeland	50%	71%	60%	59%
C27	Preston St	Whitehaven	Copeland	36%	80%	66%	58%
AII 19	Aspatria Business Pk, Park Road	Aspatria	Allerdale	66%	49%	54%	58%
AII 3	Glasson Ind Est	Maryport	Allerdale	46%	66%	63%	57%
C31	Market Square	Cleator Moor	Copeland	54%	66%	49%	56%
C11	Frizington Rd	Frizington	Copeland	58%	51%	54%	55%
AII 10	Rise Howe Ind Est	Flimby	Allerdale	52%	69%	46%	55%
C2	Whitehaven Commercial Pk		Copeland	56%	46%	60%	54%
AII 23	Silloth Harbour	Silloth	Allerdale	50%	66%	46%	53%
AII 7	Low Road	Cockermouth	Allerdale	58%	66%	31%	53%
C10	Cleator Mills	Cleator	Copeland	50%	49%	46%	48%
C4	Red Lonning	Whitehaven	Copeland	38%	60%	49%	48%
C19	Station Yard	Moor Row	Copeland	48%	54%	40%	48%
C15	Devonshire Road (E11)	Millom	Copeland	44%	37%	57%	46%
C13	Beckermest Industrial Estate		Copeland	48%	43%	43%	45%
AII 8	East Causeway Head, Silloth Airfield	Silloth	Allerdale	48%	49%	37%	45%
C12	Cross Lane	Seascale	Copeland	48%	26%	54%	43%
AII 9	St Helens Business Pk	Flimby	Allerdale	42%	40%	49%	43%
C18	Furnace Row	Distington	Copeland	36%	34%	46%	38%
C20	Rowrah Station Yard Ext		Copeland	40%	51%	20%	38%
C16	Mainsgate Road Ext	Millom	Copeland	34%	26%	46%	35%
C9	Leconfield Extension	Cleator Moor	Copeland	22%	34%	43%	32%
C17	Millom Pier	Millom	Copeland	28%	26%	43%	32%
AII 17	Moor Rd	Great Clifton	Allerdale	30%	26%	31%	29%
AII 19	Annie Pit Lane (complete)	Workington	Allerdale	0%	0%	0%	0%
AII 15	Plot D Reedland Rd (complete)		Allerdale	0%	0%	0%	0%
★	Information not available						



Appendix C
Report of Consultation

List of Consultees

Organisation	Name
LOCAL COUNCILS	
Allerdale Planning	Jill Elliott/Steve Long
Allerdale Economic Development	Cath Howard/Debbie Keir
Copeland Planning	Tony Pomfret
Copeland Economic Development	Steve Smith/Sayon Yaidoo
Allerdale flood/drainage	Mike Faulkner
Allerdale contaminated land	Joanne Doran/Sian Tranter
Copeland flood/drainage	David Bechelli
Copeland contaminated land	Thomas Greer
OTHER PUBLIC SECTOR	
NWDA	Linda Doyle/Jane Taylor/Sarah Brigg John Litt
Cumbria Vision	Richard Pealin/Martin Staveley
Invest in Cumbria	Graham MacWilliam
Cumbria County Council	David Haughian
NDA	John Knox
WLR	Noel Butters/Paul Crooks
WCDA	Ray Patterson
Regen North East Copeland	Bob Metcalfe
Egremont MTI	Simon Walker
PRIVATE SECTOR	
Suzanne Caldwell	Cumbria Chamber of Trade
Andy McLeod	Eastman Chemical Ectonia
Agent	Mitchells, Cockermouth
Agent	Carigiet Cowen
Agent	Capita Symonds
Chris McGough	Ashtenne
Tim Hurst	West Lakes Properties
Phil Haslam	Priority Sites
Maryn Boak	Northern Developments Ltd

General Comments about Supply

- Scale
- Type
- Quality

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> ▪ Industrial supply - too much land in wrong place and poor quality, demand generally at smaller end of spectrum (i.e. managed workspace) and non suited to larger scale stock that is dominant in existing industrial estates ▪ Office supply - need higher quality in town centres and other accessible urban locations ▪ Employment land in short supply in Cockermouth. There is a need for additional land. Mitchell's auction market site identified as a possibility
Landowners and Developers	<ul style="list-style-type: none"> ▪ Too much land and premises. Especially low quality in inaccessible locations ▪ Priority Sites are developing small scale industrial accommodation in Cockermouth (2,900-5,200 sq ft, 50,000 sq ft in total). They are looking at other locations in West Cumbria but this is their first project ▪ [Outstanding consultations]
Local Agents	<ul style="list-style-type: none"> ▪ Supply is adequate to fill level of enquiries (but no view as to whether enquiry levels are constrained by supply). Property is available at all sizes and quality ▪ Supply levels are adequate in West Cumbria, with ranges of quality across a range of locations
Major Employers	<ul style="list-style-type: none"> ▪ [Outstanding consultations]

General Comments about Demand

- Scale
- Type

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> ▪ Enquiries to WCDA are down 30% in 2008, however conversion rates remain high (c10%) ▪ Demand for managed workspace is healthy. However sites which have been transferred to Space North West are suffering problems. Consultees believe this is due to poor management rather than being an indicator of demand. Demand is good for managed workspace at Phoenix Enterprise Centre (Cleator Moor) and there are proposals to expand provision through further refurbishment (funding has been secured from West Cumbria Development Fund by the scheme is reliant upon to securing match funding from NWDA) ▪ Provision of small scale space on flexible terms (rather than long term leases) is important to cater for small scale and start up businesses ▪ Demand is being driven by availability of premises due to a lack of quality supply. This is especially the case for offices. Lillyhall appears attractive, because there are few alternatives, especially in town centres ▪ Remoteness/accessibility are key issues for West Cumbria. A number of key road schemes lack funding. Completion of Carlisle NDR will be beneficial to West Cumbria, in particular by improving access to and from Scotland ▪ Uncertainty regarding the scale and nature of demand for sites/premises that will be generated by decommissioning at Sellafield presents a challenge for effective land use planning (LDF process) ▪ Sale of Sellafield has added to the uncertainty, for example will existing sub contractors be retained? Will sub contractors still be required to have a Cumbria address? ▪ There is no precedent for land use impact of decommissioning - American example at Oakridge have included decommissioning of 2 parts but retention of 1 part - so no example of 100% decommissioning ▪ It is possible that development at Westlakes does not require gap funding - may be able to command higher rents in view of limited supply (market niche) ▪ NWDA build criteria is too strict and may have stifled demand at Whitehaven Commercial Park ▪ Demand for offices is limited away from main locations of West Lakes and Lakeland Business Park (but is that because of lack of supply, especially in town centres?) ▪ At a Cumbrian level accept demand is strongest in the east, but recognise demand and need in the west. Sub-regional perspective must take this into account
Landowners and Developers	<ul style="list-style-type: none"> ▪ Demand has been high for sites run by public sector agencies due to incentives offered and low rents. Businesses appear artificially viable. Demand is much lower for units offered at market rents, especially in more marginal/remote locations. Culture shift is required ▪ Local demand is strongest for flexible units on easy-in easy-out terms ▪ Past provision has been public sector driven rather than market driven

Consultee Group	Summary Comments
	<ul style="list-style-type: none"> ▪ Lack of good car access will limit demand. West Cumbria is different to densely populated areas. Travel by car is essential due to distances involved ▪ Demand for Priority Sites scheme in Cockermouth to date has been from local industrial businesses. Evidence of interest from companies located further afield, e.g. Workington, but with manager/owner living in Cockermouth ▪ Shift back to leasehold is prevalent in West Cumbria as elsewhere - larger and younger firms show same trend ▪ Demand for Lillyhall (Northern Developments Scheme) has been from outside West Cumbria - firms looking to expand, mixed businesses, 4 strong enquiries including 3 office uses and 1 industrial ▪ [Outstanding consultations]
Local Agents	<ul style="list-style-type: none"> ▪ Historically and continual low levels of demand and enquiries. This is not a recent phenomenon as a result of the credit crunch ▪ Existing portfolio should be sufficient to fulfil most requirements ▪ Larger units remain on the market throughout W. Cumbria this reflects the types of businesses seeking this type of accommodation and seem to be the most difficult to let. Next most difficult property type to let is standard office accommodation ▪ Demand is driven by requirements from small businesses who require maximum flexibility ▪ Maryport has been stated as a location for small-scale, light industrial and distribution accommodation - with flexible lease terms ▪ There has been some residential interest in employment sites but this has ebbed considerably with many housebuilders no longer buying sites. Sites have taken too long to come to the market and the opportunity has now gone
Major Employers	

Sectoral Drivers (including nuclear)

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> No evidence of increase in enquiries from nuclear sector Still lack of information about nuclear decommissioning (will this change following announcement of preferred bidder for Sellafield contract?) Is there scope for relocation of administration staff from Sellafield - potential for prime office market in town centres? Lack of cultural sector and cultural industries in West Cumbria generally, this has knock on effects to other employment uses such as tourism and hotels (this is an area Egremont MTI are seeking to address)
Landowners and Developers	<ul style="list-style-type: none"> No evidence of impact of nuclear decommissioning. Question reality of aspirations. West Cumbria is already "Britain's Energy Coast", not clear how much more can be milked from this. Highly risky to plan employment premises provision on back of aspirations without evidence [Outstanding consultations]
Local Agents	<ul style="list-style-type: none"> Evidence of small scale office demand for contractors requiring a Cumbrian address to tender from Will new build nuclear reactors be a catalyst? Type/size and numbers of requirements created by the Nuclear Sector seems to be unclear Supply chain what are the requirements - types/length of contracts from the Nuclear sector will translate to types of leases and occupational requirements
Major Employers	

Town Centre Issues

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> Whitehaven: no quality office space in the town centre (space to be vacated by I.R. has already been taken up). Potential for quality development around Whitehaven marina. Feeling that landowners likely to sit on land until values increase (hold out for residential) rather than seek commercial use
Landowners and Developers	
Local Agents	<ul style="list-style-type: none"> The primary town centres do not have suitable office accommodation currently, however new provision of space concentrated in these areas will still have competition from the non town centre office locations Maryport - availability of office space is low, this is most likely to be due to the lack of demand as opposed to lack of development sites. Maryport has no serviced offices developments There is a number of standard office accommodation across Workington, there is a lack of demand from the market rather than lack of development sites. For example John Peel House and Stanley Street have been on the market with minimum levels of enquiries Demand tends to be driven by requirements in terms of location as opposed to rent being the primary driver
Major Employers	<ul style="list-style-type: none"> Businesses located out of town as a result of former (inward investment) funding strategies

Rural Issues

- Supply and demand
- Role of key service centres

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> ▪ Links to LDNP are important. Scope for West Cumbria to absorb spin-offs from expanding companies in LDNP. NWDA are funding research into three priority projects in LDNP - one incubator and two business parks ▪ Space North West acquisition has negatively impacted on 'real' availability in rural areas. New and expanding businesses are finding a remote landlord difficult to deal with ▪ Shortage of workshop space for new starts and expanding businesses (although proposed refurbishment at Phoenix Enterprise Park will help address this in the vicinity of Cleator Moor). Public sector response is often to provide offices, but for small businesses workshops are much more critical. Main demand is for higher quality space with shared facilities ▪ Managed workspace should be focused in Key Service Centres ▪ Focus in North Allerdale should be on making what is there work better and in a more coordinated way rather than expansion ▪ Wigton and Siloth have strong entrepreneurial culture. Aspatria is much more challenging with embedded dependency issues ▪ Wigton has no space for existing businesses to expand. There has been pre application discussion to extend Syke Road site to the south, beyond the existing allocation. Possibly for speculative units. The auction market is relocating adjacent to Syke Road allocation
Landowners and Developers	<ul style="list-style-type: none"> ▪ Generally weak demand in sites in extreme north and south of study area. Employment provision here has been driven by public sector to serve an economic development need ▪ Are there too many sites in rural areas? e.g. Aspatria is only 10 minutes from Fletchertown. Fletchertown works well but is there scope to relocate occupiers from one to the other and release one for housing?
Local Agents	<ul style="list-style-type: none"> ▪ Choice of type and quality of accommodation supply spread throughout West Cumbria, west Cumbria is an area dominated by the car and the necessity of private transport
Major Employers	

Specifics about Sites

- Limit to information not captured by proforma

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> ▪ Lillyhall: General view is that this is a manufacturing location. Unsustainable in transport terms. As such it should not be prioritised for other forms of development, particularly uses requiring customer/client accessibility. Noted the existing highway network is nearing capacity and the Highways Agency have raised concern about future proposals. Electricity supply is also poor ▪ Derwent Howe: Potential office location? More sustainable than Lillyhall ▪ Whitehaven Town centre Sites: Better to focus on residential and cultural/creative uses here rather than employment. However, would be beneficial to increase the quality office supply in the town centre (and in other town centres) ▪ Powbeck: Critical importance due to strategic location ▪ Westlakes: Could West Cumbria Hospital be relocated to the land between Westlakes and the existing hospital site? Would there be potential to develop spin off or 'health park' related uses, building on the presence of higher education at Westlakes? (Other hospital supply chain uses - for example food for Carlisle hospital is transported daily from Huddersfield/Bradford). As Westlakes is the prima office location Economic Development raised some queries regarding the rationale for deleting the 'area of search' to expand Westlakes ▪ Leconfield: Existing space is too large for market, sub-division is not possible due to structures, but perception that there would be demand for small to medium sized workshop space. Could provide medium scale or follow-on space with characteristics that town centre sites cannot fulfil (i.e. frequent vehicle movement, HGV access etc)
Landowners and Developers	<ul style="list-style-type: none"> ▪ Leconfield: Owner seeking mixed use scheme, residential led. However, open to discussion about provision of employment within mix - believes flexible workshop units might work in better location on site. Understands there has also been retail interest on part of site. There is no logic in the extension site, and no justification in terms of demand ▪ Lillyhall: Unsustainable location, lack of support services. Growing issue with increasing office and knowledge based uses on site. Key issue/opportunity to be addressed in future ▪ [Outstanding consultations]
Local Agents	<ul style="list-style-type: none"> ▪ Demand for offices in Maryport is very low; only viable B1 type development is studios type workspace [Outstanding consultations] ▪ Agents can make decisions based upon requirements i.e. good quality office accommodation requirement will be shown a range of locations such as West lakes S & T Park, Dovenby Hall and Lakeland Business Centre ▪ The small industrial workshops on Solway trading estate has a wide range of users of, users range from electrical distributors, printers and fork lift truck servicing
Major Employers	

Opportunities for West Cumbria

- Sectors
- Property Types
- New ways of working e.g. remote working

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> ▪ West Cumbria Hospital: Copeland are keen to find a site to relocate the hospital within the borough (rather than to going to Lillyhall). They have found sites but the guidance provided by the Health Authority on the size of the site required is very limited. The redevelopment of the existing hospital site is also a consideration ▪ Nuclear decommissioning, but not clear about implications, and will decommissioning release the skills needed by the wider environmental technology industry?
Landowners and Developers	<ul style="list-style-type: none"> ▪ [Outstanding consultations]
Local Agents	<ul style="list-style-type: none"> ▪ There has been some small scale opportunities due to the Nuclear Sector but there is a hope that there will be much more to come following government decisions on Nuclear Power ▪ In particular there is hope that more large scale requirements spin out from the Nuclear Sector in West Cumbria ▪ Small workshop have attracted a wide range of users ▪ Are small hybrid units a possibility at some locations (office/industrial) in West Cumbria, ▪ Serviced offices have become more popular with developers as they provide accommodation for most types of businesses ▪ Agents Research, suggests that the larger units remain on the market
Major Employers	<ul style="list-style-type: none"> ▪ Logistics such as road networks can be a problem in West Cumbria however the use of a commercial (freight) airfield has been mentioned as adding value to West Cumbria

Viability of Development

Consultee Group	Summary Comments
Public Sector Stakeholders	<ul style="list-style-type: none"> Rents may be held artificially low by gap funding, especially on WLSP; but without gap funding would quality suffer? NWDA design standards impact on feasibility - are the benchmarks set too high? Development of West Cumbria Business Centre (Lillyhall) cost £100 psf 20,000 sq ft at Maryport cost £2.2m to build; rental income is £40,000 pa. Unviable for private sector NWDA seem to be shifting away from infrastructure provision and direct development. Will assist delivery of a cleared site to the market
Landowners and Developers	<ul style="list-style-type: none"> Rents have been held low by public sector. When private sector rents are applied clearly shows viability of some locations/estates, e.g. Bridge End and Seascale, and non viability of others e.g. Millom, Leconfield Newer industrial starter units should be let at, at least £3 psf on 3 year leases, breaks at no less than 12 months. This is working in some locations, e.g. Bridge End. Rents of £4 to £5.50 psf are being achieved on best sites (Cross Lane, Lillyhall Business Centre, Sneckyeat) Larger industrial units command £2-£2.50 psf Offices (excluding West Lakes) command between £7 psf and £10 psf. Maximum achieved recently by private sector at Lillyhall Business Centre is £10.42 psf [Outstanding consultations]
Local Agents	<ul style="list-style-type: none"> There has been both small scale and large scale development throughout West Cumbria in recent years (private and public) The issue of demand/requirements and competition remain key Supply of accommodation is already ample in West Cumbria developers could view the location as a risk Empty rates may begin to play its part in terms of vacant units adding additional risk to development of new units Build costs for new developments require careful consideration New build office schemes even in the cities within Cumbria where market rents are higher may not support acceptable returns for developers
Major Employers	<ul style="list-style-type: none"> Some businesses have located in West Cumbria due to previous inward investment packages, many remain for this reason