



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

Employment Land Review

Sheffield City Council

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1.0 Introduction

- 1.1 Nathaniel Lichfield & Partners [NLP] with Guy Rusling Commercial Surveyors [GRCS] has been commissioned to undertake an Employment Land Review [ELR] by Sheffield City Council [SCC]. The purpose of the ELR is to provide a robust evidence base to demonstrate the need for and deliverability of, employment land allocations across the City. The ELR will inform a review of the Sheffield Local Plan (Core Strategy) as well as informing site allocations within the emerging City Policies and Sites document.
- 1.2 The ELR will assess Sheffield's employment land requirement and identify a portfolio of sites to meet an identified level of demand whilst complying, where possible, with guidance on Employment Land Reviews. The Study has been informed by recent retail and housing studies as well as new proposals for retail site allocations.
- 1.3 It is understood that the Study will feed into a number of other documents, including the City Centre Masterplan, the emerging Sheffield and Rotherham Don Valley Masterplan and the Sheffield Economic Strategy.
- 1.4 The Study has the following objectives:
- 1 To assess the future demand for employment land;
 - 2 To assess the future supply of sites for employment;
 - 3 To assess the suitability of around 80 individual sites, whether existing, permitted or proposed for future employment uses;
 - 4 To identify sites which are unlikely to be required by the market or are now unsustainable for employment development;
 - 5 To develop appropriate future policy recommendations; and,
 - 6 To improve systems for monitoring outcomes and reviewing employment policies and programmes.

Context

- 1.5 The National Planning Policy Framework [The Framework] requires the Sheffield Local Plan to set out priorities for homes and jobs needed in the area and to provide suitable amounts of land for housing and employment. The Local Plan is required to allocate sites to promote development, based on adequate, up-to-date and relevant evidence about the economic characteristics of the City.
- 1.6 The Sheffield Local Plan includes a Core Strategy which was adopted in 2009. Policy CS1 specifies that land should be made available for employment use in the right locations, in order deliver the Council's

aspirations and ensure that the economic aims and objectives of the City are achieved.

- 1.7 Policy CS1 bases its employment land requirements on the average rate of development for B1, B2 and B8 class uses over the previous ten years plus a 50% margin to reduce past constraints. Accordingly, it requires the following amount of land to be maintained at all times to provide a 5-year supply: 20 ha for B1(a); 25 ha for B1(b) and (c); and 100 ha for B2 and B8 with associated B1(b) and (c) and similar sui generis uses. The Lower and Upper Don Valleys are expected to complement the City Centre as strategic employment areas, directing development away from its traditional city centre location which is no longer a suitable location for metal industries and related manufacturing.
- 1.8 The level of requirement set out in CS1 incorporates the recommendations and findings of the 2006 Employment Land Demand Assessment [ELDA] for the City of Sheffield. The report assessed the future demand for employment sites in Sheffield over the period 2006 – 2016. It concluded that recent growth in employment in the service sector and creative industries sector would continue, driving demand for B1 business space, and that employment in the manufacturing sector would continue to decline due to significant productivity gains. However a modern, competitive manufacturing sector was expected to require an adequate supply of modern and competitive sites, whilst the demand for B8 space was identified to be strong. Notwithstanding this, methodologies for calculating the demand for general industrial space suggested anywhere between -16 ha and +295 ha (443 ha including a margin for choice) of land would be required over the ten year period to 2016. Whilst recommending that there should be a significant allocation of B2 general industrial land, the ELDA also recommended a future review of this figure, based on monitoring information.
- 1.9 The Employment Land Demand Assessment emphasised the importance of Sheffield having the right portfolio of employment land and property in place to satisfy the identified level of demand. The sites to be set aside and allocated to meet the requirement levels were subsequently identified in the Employment Sites Survey, produced in 2007 and updated in 2009.
- 1.10 In response to the changing planning policy and socio-economic context since the original ELDA was prepared, SCC recognised that some aspects of the Study are now out of date and consequently a new ELR is required. These changes include:
- 1 The significant overhaul of national planning policy since 2006, including the publication of The Framework in 2012 and the imminent abolition of the Regional Strategy for Yorkshire and The Humber;
 - 2 The change in Government in 2010 and the introduction of the Localism Act (2011);

- 3 The global economic downturn and its impact on the development sector and property market; and
- 4 Updates to employment demand and growth forecasting.

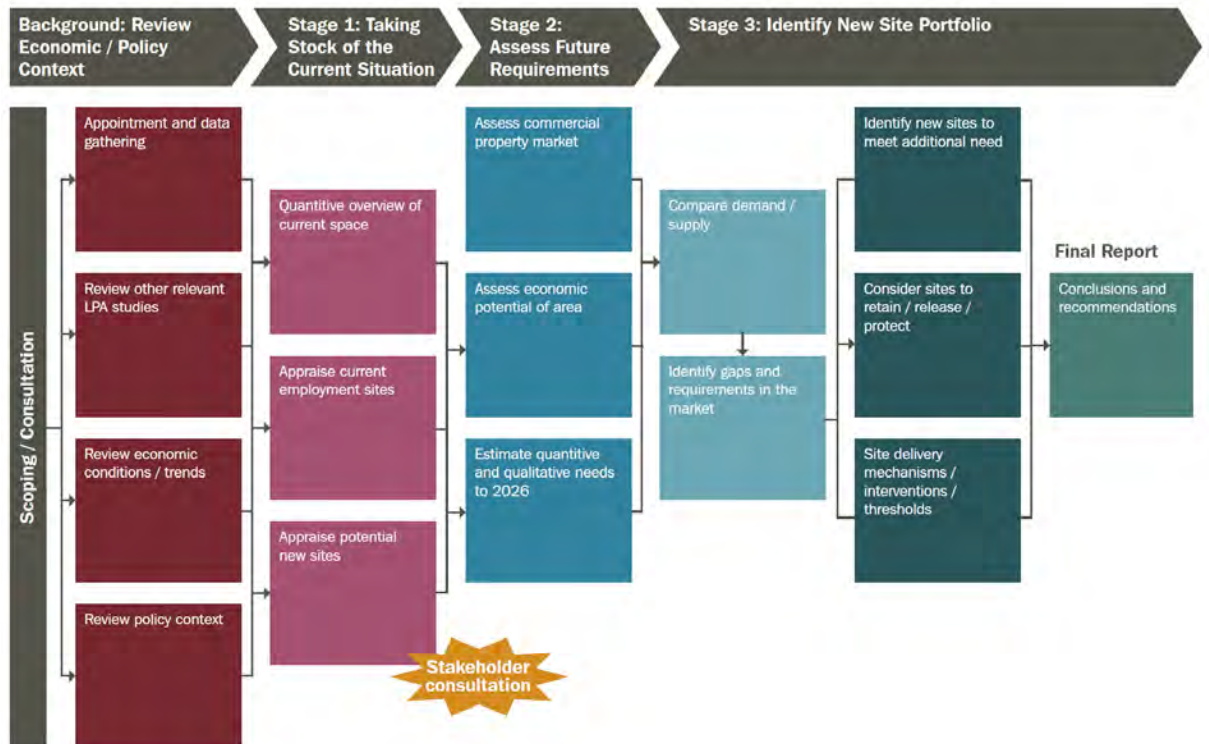
1.11 The two key aims of the ELR are therefore to assess Sheffield’s employment land requirement and to identify a portfolio of sites to safeguard in order to meet this level of demand. The study will address the requirements of The Framework, provide a ‘reality check’ on the Core Strategy policies and inform the site allocations and policy areas designations in the City Policies and Sites DPD, the remaining element of the Sheffield Local Plan.

1.12 This ELR will also assimilate the findings of recent retail studies and new proposals for retail site allocations, as well as the Strategic Housing Market Assessment [SHMA] and Strategic Housing Land Availability Assessment [SHLAA].

Approach and Methodology

1.13 The approach to addressing these requirements is set out overleaf and broadly illustrated by Figure 1.1.

Figure 1.1 Study Methodology



1.14 It follows the principles of the ODPM’s ‘brown book’ guidance¹ which

¹ Employment Land Reviews Guidance Note, ODPM (2004)

remains extant despite the publication of The Framework and the subsequent Taylor Review of Government Planning Practice Guidance², and other tasks as required by the Council's Brief.

- 1.15 Whilst the study predominantly focuses on employment space needs for the group of B Use Classes indicated in Table 1.1, The Framework gives a wider definition of economic development than just B class uses, and many of these uses produce jobs and create pressures on employment land. As such this ELR also provides an overview of the demand for retail (including bulky goods), leisure and other employment accommodation in addition to typical B-Class uses. This is to ensure that the ELR is consistent with the findings and recommendations of recent retail studies. Commentary is also provided on the future job requirements from Sui Generis land uses (such as waste, renewables and car showrooms etc).

Table 1.1 B-class Employment Land Definitions

B1a	Office <ul style="list-style-type: none"> Offices other than in a use with Class A2
B1b/B1c/B2	Industrial <ul style="list-style-type: none"> Research and development – laboratories and studios Light industry General industry (unless in B1)
B8	Storage or Distribution <ul style="list-style-type: none"> Storage or distribution centres – wholesale warehouses, distribution centres and repositories

- 1.16 A key input to this process was consultation with various organisations with an interest in the supply of employment land including employers, economic development and inward investment agencies, business groups, property agents and developers. Appendix 1 contains a list of consultees.
- 1.17 The study draws upon employment land studies in adjoining districts and other relevant documents including planning policy guidance, property market information, local and regional economic strategy documents, planning policy documents, economic sector studies and published economic statistics.
- 1.18 A key issue underlying the study concerns how the current recession in the wider economy and its implications for the commercial property market should be reflected in the analysis. However, it should be emphasised that the Council's Local Plan process will be planning for longer term needs to 2031. Therefore, the analysis is based not only on Sheffield's historical commercial/industrial property market trends and recent experiences, but also takes a view on how it is likely to recover and perform in future.

² CLG (December 2012): External Review of Government Planning Practice Guidance: Report submitted by Lord Matthew Taylor of Goss Moor

- 1.19 The employment portfolio will be refined based on consultation and further evidence gathering prior to informing the City’s Local Plan process.

Structure of Report

- 1.20 This document is structured as follows:

Study Context (Section 2.0)	An overview of Sheffield City from a planning policy perspective, including an analysis of relevant regeneration studies and employment land contextual research.
Economic Context (Section 3.0)	An overview of current economic conditions and recent trends in the City and adjoining areas that may affect the need for employment space.
The Sheffield Commercial Property Market (Section 4.0)	A review of the Sheffield commercial property market, particularly demand for and supply of different types of employment space and any gaps in provision.
Stakeholder Consultation (Section 5.0)	An overview of the consultation undertaken over the course of the study involving interviews and workshops.
The Current Stock of Employment Space (Section 6.0)	A brief assessment of the current stock of employment space in the City, including levels and types of provision and recent changes in supply as well as major developments and employment land supply in nearby areas.
Economic Potential and Growth Sectors (Section 7.0)	Consideration of the potential future economic role of the City and specific sectors with growth potential.
Future B-Class Employment Space Requirements (Section 8.0)	This section translates estimates of net employment land requirements into gross requirements.
Review of Employment Sites (Section 9.0)	An assessment of the current stock of existing / available employment sites in the City.
Demand / Supply Balance (Section 10.0)	Compares actual levels of available land with anticipated requirements to understand the extent to which new allocations will be required. This section also analyses the policy choices available to SCC, alongside the needs of non-B uses and delivery mechanisms.
Summary Conclusions (Section 11.0)	Summarises the study’s main findings and recommendations.

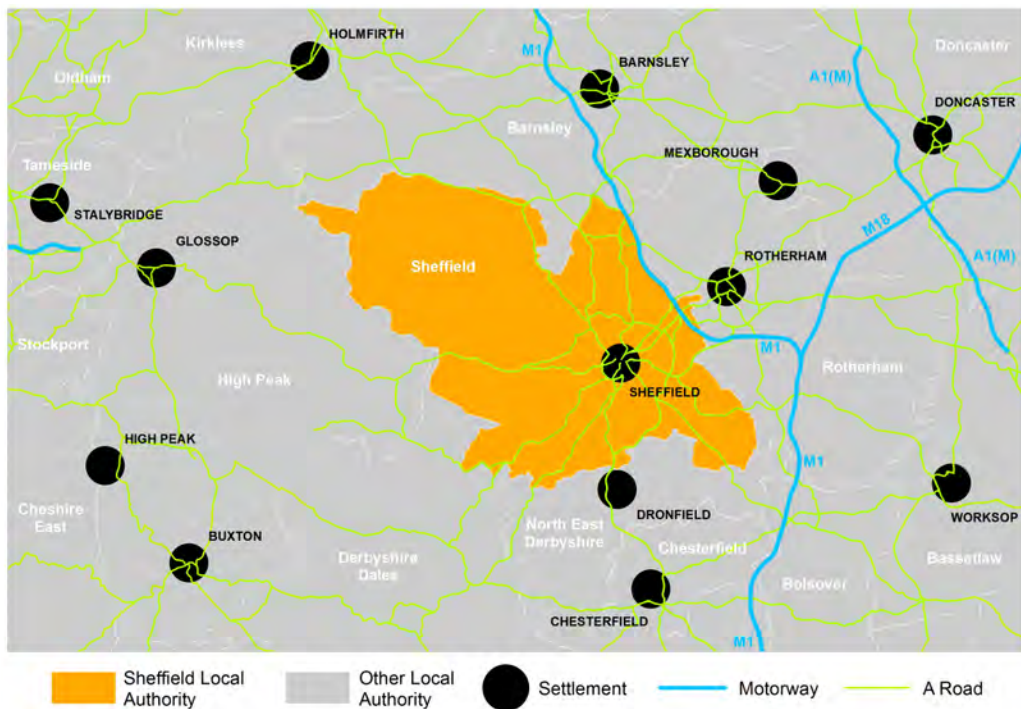
2.0 Study Context

2.1 This section of the report provides a brief overview of the study area, followed by a summary of the relevant national policy basis underpinning the ELR, and finally a review of policy documents relating to employment land within Sheffield.

Geography and Connections

2.2 Sheffield is a City located in the South Yorkshire conurbation within the Yorkshire and Humber region and is England’s third largest metropolitan authority, with a population of 552,700. Sheffield is recognised as having a distinctive role as a steel city and centre of heavy manufacturing, which over the years has suffered significant decline.

Figure 2.1 Sheffield Sub-Regional Context



Source: NLP Analysis

2.3 Sheffield City has a strong network of key transport routes, most of which converge on the City Centre, including connections from the A6109 to M1 Junction 34 and the A630 (Sheffield Parkway) link towards M1 Junction 33. Two other Key Routes also run through each of the Lower and Upper Don Valleys. Strategic routes are provided by the M1 and M18 motorways, as well as the A1(M).

2.4 Public transport provision includes a three line tram network in Sheffield, (providing a high frequency link between Sheffield City Centre and Meadowhall, Malin Bridge / Middlewood and Herdings Park /Halfway)

and the provision of high frequency bus services. Sheffield has a national reputation for its public transport.

- 2.5 Sheffield is located near to three airports, Doncaster being the closest, with Manchester and East Midlands airports less than 2 hours drive away. All can be accessed via public transport.

Sheffield City Region

- 2.6 Sheffield is the centre of the Sheffield City Region (SCR) which consists of eight other local authorities and is at the heart of several strategic networks, crossed by a number of important strategic highway links, including the M1, A1(M), M18 and M180. Trans-Pennine road links are provided by the A57 Snake Pass and the A616/ A628 Woodhead Pass.

- 2.7 Parts of the Sheffield City Region are also an allocated Enterprise Zone. Enterprise Zone policy enables rating authorities to grant Enhanced Capital Allowances and Business Rate relief to occupiers of non-domestic properties on sites located within the Enterprise Zones.

- 2.8 The SCR Enterprise Zone focuses on attracting, securing and accelerating investment in the following target a number sectors:

- Modern Manufacturing;
- Creative and Digital Industries;
- Healthcare Technologies; and
- Low Carbon and Environmental Goods and Services.

- 2.9 There are currently a number of confirmed Business Rate Relief Sites and Confirmed Enhancement Capital Allowance sites in Sheffield. Investment into these will support the Enterprise Zone vision and deliver additional economic benefit to the wider City region.

Policy Review

National Policy Context

- 2.10 National planning policy places a particular emphasis on sustainable development through a process of:

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

- 2.11 The coalition Government's policy approach to planning has been focused on applying principles of 'localism' to give LPAs greater autonomy in planning for housing, and in particular setting local housing requirements in their development plans. The Localism Act (2011) enabled the Regional Strategy [RS] for Yorkshire and The Humber to be rescinded and this no longer forms part of the statutory development plan.
- 2.12 The responsibility will therefore fall to LPAs to set employment land requirement figures for their Local Plan. Local land targets will be tested through the Local Plan process and local authorities will need to collect and use reliable information to justify employment land supply policies.
- 2.13 This section of the report provides a summary of the relevant policy documents relating to employment land and commercial leisure development within Sheffield.

National Planning Policy Framework (March 2012)

- 2.14 The National Planning Policy Framework (the Framework) sets out the Government's economic, environmental and social planning policies for England. The Framework states that the purpose of the planning system is to contribute to the achievement of sustainable development, which should be seen as a 'golden thread' running through both plan-making and decision taking.
- 2.15 The document states that there are three dimensions to sustainable development: economic, social and environmental. The economic role that the planning system must perform involves contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure [¶7].
- 2.16 Within the overarching 'presumption in favour' of sustainable development, the Framework identifies 12 core land use planning principles that should underpin both plan-making and decision taking. These 12 principles are that planning should (inter alia):
- Be genuinely plan-led; based on joint working and co-operation to address larger than local issues;
 - Proactively drive and support sustainable economic development [...] identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth;
 - promote the vitality of our main urban areas, protecting the Green Belts around them, recognising the intrinsic character and beauty of the countryside and supporting thriving rural communities within it;

- encourage the reuse of existing resources, including conversion of existing buildings;
- prefer development land of lesser environmental value;
- encourage the effective use of land by reusing previously developed land;
- promote mixed use developments; and
- actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable[¶17].

2.17 The Framework states that ‘significant weight’ should be placed on the need to support economic growth through the planning system. To help achieve economic growth, Local Plans should:

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit [¶21].

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

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

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

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

2.21 In addition, The Framework requires planning policies to support economic growth in rural areas in order to create jobs and prosperity. In promoting a strong, rural economy, local and neighbourhood plans should, inter alia:-

- Support sustainable economic growth and expansion of all types of business and enterprise in rural areas, both through the conversion of existing buildings and well designed new buildings;
- Promote the development and diversification of agricultural and other land-based rural businesses;
- Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres [¶28].

2.22 Planning policies are also expected to promote competitive town centre environments by allocating a range of suitable sites to meet the scale and type of leisure, tourism, cultural and community development needed in, or on the edge of, town centres. The Framework requires the needs for these uses to be met in full and not compromised by limited site availability [¶23].

Localism Act (2011)

2.23 Section 110 of the Localism Act sets out a 'duty to cooperate' for all local planning authorities and County Councils in England. The new duty relates specifically to matters of sustainable development or strategic issues which will have a significant impact on more than one local planning area. The Act places a duty on local planning authorities to set

out specific policies to address these strategic issues and requires them to consider joint approaches to policy and plan making.

- 2.24 The Framework (2012) sets out where co-operation might be appropriate and what form it might assume. It concludes that “*cooperation should be a continuous process of engagement from initial thinking through to implementation*” [¶181].

Sheffield Local Plan

Core Strategy (2009)

- 2.25 Sheffield’s City Council Core Strategy was adopted in March 2009, forming part of the statutory development plan, and setting out the overall policies for employment land in Sheffield.
- 2.26 Policy CS1 outlines that land will mainly be made available for offices and industrial development in existing employment areas. Suitable sites which are in industrial and business areas will be safeguarded, and additional space created through demolition of existing areas. A 5 year supply for each type of land will be maintained, as follows:
- 20 ha of office;
 - 25 ha of other businesses; and
 - 100 ha for general industry and storage/distribution and other sui generis general industrial /processing uses.
- 2.27 Policy CS2 outlines a priority for new business and industry development to be on previously developed land, and requires that land should be accessible by public transport. The policy states that no more than 4 hectares, or 2.5% of all land development, over any five-year period will be on greenfield land.
- 2.28 Policy CS3 outlines six key locations for office development, including the City Centre; accessible locations at the edge of the City Centre, District Centres; Hillsborough and Crystal Peaks transport interchanges; around Meadowhall and Tinsley Park. Development in the City Centre and its edge should include at least 65% of the total office development within Sheffield.
- 2.29 Policy CS4, highlights offices in the City Centre, as a priority and outlines a number Priority Offices Areas for major office development, which will be promoted and encouraged in these locations. New Office floorspace will also be located within other areas of the City Centre, as part of mixed use schemes, together with housing where appropriate.
- 2.30 Other Core Strategy policies, notably policies CS5-13 and CS30-33, deal with key employment provision within various parts of the City, and are therefore relevant to this study. The policies, and the key employment

areas to which they relate, are discussed in more detail alongside assessment of the various employment sites in Section 9.0.

Sheffield City Policies and Sites DPD

- 2.31 This City Policies and Sites document will manage development in the city, identify development sites (allocations) and describe the type of development expected on them. The Policies and Sites DPD will sit alongside the Core Strategy to make up Sheffield's Local Plan.
- 2.32 The 2013 Pre-Submission Draft provides an update to the 2010 Additional Preferred Options, and has been presented at Cabinet before being published for consultation in June 2013. The document proposes a number of draft allocations, each of which outlines the required land uses, conditions on development, policy area and details of how the site is expected to be delivered.
- 2.33 63 of the sites reviewed as part of this study are allocated within the Cites Policies and Sites Pre-Submission Draft document. 26 of these sites are allocated for Business or Industrial use; seven have flexible allocations; six for office use, one for waste management, one for housing, one for office and housing and finally 15 for industrial. Consideration is given to the draft allocations set out within the City Policies and Sites DPD as part of the site assessment process detailed in Section 9.0 of this report.

Action Plans and Masterplans

- 2.34 A number of masterplan documents have been approved by the Council for the purposes of guiding development but do not form part of the development plan and have no statutory status. A brief summary of relevant Action Plans and Masterplans is provided below.

City Centre Masterplan (2008)

- 2.35 The City Centre Masterplan builds on the framework of an earlier 2000 City Centre Masterplan, incorporating projects which are in the process of implementation and identifying the next key stages of development and transformation within the City Centre through a number of key projects and interventions. Aspirations of the Masterplan include:
- To boost the stock of Grade A prime office space;
 - To deliver an expanded and high quality retail offer which will support the growth in office development;
 - To create a supply of good quality complementary office space in a range of attractive edge of centre locations;
 - To diversify the office portfolio to meet the needs of indigenous and new businesses; and

- To create a high quality business environment and public realm that links the key areas of activity within the city centre.

2.36 Key Projects through which the above aspirations will be realised include the new Retail Quarter; New Business District; Riverside Business District- West Bar; Wicker/Riverside, Castlegate; Victoria Quays; and Sheaf Valley/Digital Campus. Some of these projects have now been substantially developed.

MADE in Sheffield – a deal for growth

2.37 The Sheffield City Region’s focus on economic growth is driven by the economic potential of the area’s skills base and modern manufacturing economy. By combining digital innovation and advanced manufacturing expertise SCR aim to capitalise on these key assets and heritage. Through the City Deal SCR is working towards taking control of powers and funding, so that eight local authorities can make strategic decisions based on a common framework, prioritising key issues across the region. A formal review, required as the first step towards establishing a combined authority has commenced.

2.38 A key priority of the Sheffield City Region is to utilise innovative financial tools to secure growth including New Development Deal. NDD gives the freedom to deliver critical infrastructure through tax increment financing, with the ability to borrow against future business rate income in key development zones which include Sheffield. Sheffield City Council intends to bring forward a series of city centre infrastructure investments through the NDD to transform the city centre, through this mechanism.

Upper Don Valley, Physical Regeneration Strategy (2006)

2.39 This document identifies and promotes policies and actions to attract investment and new development to the Upper Don Valley, addressing in particular problems of underused and vacant land. It encourages new employment opportunities across the Upper Don Valley, whilst supporting and sustaining existing employment and businesses.

2.40 It specifically aims to support specialist material technologies and advanced manufacturing, related to new and existing businesses, whilst also developing a broader and more diverse mix of uses across the Upper Don Valley. It also recognises that the quality of the environment and its industrial character will also need to transform to attract investment in new uses.

Lower Don Valley Masterplan (2005)

2.41 The Lower Don Valley Masterplan was produced by Urban Strategies Inc. of Canada (USI) for British Land and the City Council. It aims to safeguard viable existing businesses and attract new investment to the Lower Don Valley to meet the challenges of a new economy, whilst

complementing sectors in Sheffield's core growth clusters. A number of regeneration targets and ambitions are referred to in the Masterplan, including:

- 14,100 net new local jobs created for Sheffield;
- 3,600 new construction jobs created across the region but based in Sheffield;
- 17,400 total new jobs created across South Yorkshire; and
- Local Economic Output: £270 million per annum in Sheffield alone.

2.42 However, the Lower Don Masterplan was not fully accepted by Sheffield City Council and a report sent to Cabinet (2005) outlined a number of recommendations made by the Council. The report requested approval of the principles of the Lower Don Masterplan including the Council's recommendation. The report requests these to be taken forward for consideration for Sheffield's Development Frameworks Core Strategy.

Background Studies and Baseline Reports

Sheffield Employment Land Demand Assessment (2006)

2.43 The previous Employment Land Review for Sheffield, entitled 'Sheffield Employment Land Demand Assessment' was prepared by Arup and Donaldsons in 2006. Its conclusions are based upon a period of economic growth, prior to the current downturn.

2.44 The report highlights specific issues related to the restructuring of the manufacturing sector in Sheffield, and suggests that whilst manufacturing employment is likely to continue to decline, a modern, competitive manufacturing sector is emerging requiring a supply of high quality sites and premises.

2.45 The commercial market appraisal identified a strong demand for high quality office and industrial space, highlighting deficiencies with much of the existing stock, meaning demand was not being met. New B1 office space take up was considered to be relatively low, albeit demand for office accommodation was considered to be good. The report concluded that the market had been unable to satisfy a number of occupier requirements for B2 development, with the market responding by delivering more speculative accommodation. Demand for industrial space at the time of the report was strong, with requirements from the freehold/owner occupier markets. Take up of land for B8 storage and distribution uses fluctuated significantly.

2.46 Overall the report concluded that the strong take-up rates and market demand for business space was likely to continue in the plan period to 2016, supporting the ambitious economic development policies and initiatives of the time. Arup recommended that Sheffield City Council

include the figures below in policies within the LDF as general targets for employment land requirements from 2006 to 2016:

- B1 - 187 hectares
- B2 - 443 hectares
- B8 - 22 hectares

Sheffield Employment Sites Survey (2007)

- 2.47 Following completion of the Sheffield Employment Land Demand Assessment, the Sheffield Employment Sites Survey was undertaken by Atkins in 2007. Based on the overall employment land requirements identified in the Employment Land Demand Assessment, the survey identified the following annual take up requirements:
- B1 - 12.5 hectares;
 - B2 - 29.5 hectares; and
 - B8 - 1.5 hectares.
- 2.48 The study highlighted the importance of protecting existing employment locations, as well as providing an appropriate mix to meet Sheffield's different employment markets.
- 2.49 The study identified 43 per cent of vacant employment land in available and unoccupied within Darnall Panel Area with the vast majority of opportunity land within the available and occupied employment sites is located within the Darnall Panel Area (84 per cent). The City Centre Panel Area identified 25 per cent of vacant land and 36 per cent by opportunity land.
- 2.50 The site assessed 366.5Ha of land across Sheffield. Only 229.2Ha was categorised as currently available, with the remainder either occupied (95.8 ha) or already developed (41.5 ha). Of this available land, 63 ha was considered as suitable for B1 uses, and 166.5 ha for B2 and B8 employment. The study identified a further 181.2Ha of land readily available for potential employment land development.

Sheffield Employment Sites Survey Update (2009)

- 2.51 The 2007 Site Survey was updated in 2009 to help inform employment land policies for the next 15 years. The survey identified an annual employment land requirement of 29 ha per year for the first five years total of 145Ha, to comprise: 20 hectares for offices, 25 hectares for other businesses and 100 hectares for general industry and storage/distribution.
- 2.52 All the sites considered by Atkins as part of the review were considered suitable for future employment uses, with no sites recommended to be released for other land use.

- 2.53 The key findings from the 2009 update were that the demand and supply of new units, for both office and industrial, was likely to be affected in the short term due to the recession, from which shortfall was predicted to recover in the medium term and within time period of the Core Strategy. The Study therefore recommended the protection of potential employment land for the medium and long term readily available within the right locations to further aid Sheffield's economic recovery once economic conditions improved.

Sheffield Retail Study (2010)

- 2.54 The Sheffield Retail Study was undertaken by Cushman and Wakefield in 2010 to contribute to the evidence base for the City Policies and Sites Development Plan Document (DPD).
- 2.55 The study found Sheffield City Centre to have a reasonable state of vitality and viability, but identified the city as falling behind other centres and not fulfilling its role as a regional centre role.
- 2.56 The study outlined that despite the decline in anticipated growth in comparison goods spending in the short term, there remains a need to support the Sevenstone development in the City Centre (which comprises the proposed Retail Quarter within the city centre), in order for the City Centre to deliver its regional function. The study anticipates that even after the development of Sevenstone, additional capacity for comparison goods floorspace could accommodate circa 24,700 sq m net in 2021, rising to 59,600 sq m net in 2026. It is recommended that new retail floorspace be directed to the Primary Shopping Area, and defined District Centres thereafter.
- 2.57 The study outlines that competition will remain from other centres, in particular the out-of-town shopping centre at Meadowhall. The study concluded that there is no need to allocate additional land at Meadowhall for retail use over the plan period.
- 2.58 The study identifies capacity for additional convenience goods floorspace across the entire study area in the region of 4,930 sq m net to 2021, rising to 5,473 sq m net to 2026, with capacity to be directed to Darnall District Centre as well as a new District Centre allocated within the Core Strategy at Chaucer.

Economic Strategy Documents

Sheffield City Strategy (2012)

- 2.59 The Sheffield City Strategy outlines the vision for Sheffield in 2020, with particular focus on opportunities that Sheffield can offer for the future. The strategy highlights the immediate challenges faced by Sheffield, including the creation of jobs and promoting employment growth.

2.60 The Strategy intends to take advantage of the Sheffield City Region Local Economic Partnership (LEP), the new Enterprise Zone, the Regional Growth Fund (RGF) and the Growing Places Fund in order to fulfill the following objectives:

- Supporting businesses sectors with real growth potential;
- Responding to public sector contraction;
- Targeting youth unemployment through development of skills; and
- Improving overall Social Cohesion.

The Sheffield City Region Economic Overview, Draft Consultation (2012)

2.61 This Economic Overview sets out the priorities for economic growth in the Sheffield City Region. The document outlines a number of key principles to promote growth in the Sheffield City Region as follows.

- Increase the Sheffield City Region's Gross Value Added (GVA);
- Increase the number of jobs in the Sheffield City Region;
- Rebalance the economic base of Sheffield City Region, to (1) increase the proportion of the workforce employed in the private sector and (2) help address the economic performance gaps that exists between the City Region (as with other northern city regions) and the Greater South East; and
- Capitalise on the quality of life and environment in the Sheffield City Region, to ensure that growth is delivered in a sustainable manner.

2.62 The Strategy identified nine key sectors in driving future growth, jobs and success within the City Region. These include advanced manufacturing; construction; Creative and digital industries; Financial and business services; Healthcare technologies; Low carbon technologies; Manufacturing; Retail; and Sport, leisure and tourism.

2.63 In 2013 the LEP will produce a full strategy to set out more comprehensively the areas that will drive future growth and change in the Sheffield City Region. The full economic strategy will be developed in conjunction with the work on European funding.

An Economic Growth Strategy for Sheffield, Draft Consultation (2012)

2.64 The Strategy recognises that Sheffield is the Core City at the heart of the Sheffield City Region, and is committed to playing its part in the growth of the wider economic area. The Strategy is based on those key priorities outlined within the City Region Economic Overview.

2.65 Analysis based on 2009 available data gives Sheffield's a 'prosperity gap' of £1.63 billion. The strategy therefore aims to provide a foundation for the City's economic partners to prioritise support for, and direct investment in, the factors that drive growth in Sheffield's economy and create the right conditions in the city for long term economic success and to close the 'prosperity gap'.

2.66 The following high value sectors are identified within the document as priorities intended to compliment and drive enterprise and growth across the City:

- 1 Advanced manufacturing and materials (AMM);
- 2 Business, professional and financial services (BPFS);
- 3 Creative and digital industries (CDI);
- 4 Energy, environmental and low carbon industries (EELC); and,
- 5 Healthcare technologies (HTech).

Sheffield City Centre Master Plan – Consultation Draft (May 2013)

2.67 A consultation draft of the Sheffield City Centre Masterplan was published by SCC in May 2013. The document is at a very early stage and was released for consultation after the Employment Land Review was substantively complete. Sheffield City Council should further consider the City Centre Masterplan as the document progresses alongside the recommendations within this report when deriving future policies and allocations.

Summary

2.68 The key messages from this section can be summarised as follows:

- National planning policy requires local authorities to take a positive approach towards economic development, and makes it clear that applications seeking to secure sustainable economic growth should be treated favourably;
- LPAs should plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- Sheffield's adopted Core Strategy makes provision for a minimum of 145h of good quality deliverable employment land to 2026, with a particular focus on the City Centre for office accommodation and Lower and Upper Don Valleys for manufacturing, distribution/warehousing and other non-office businesses;
- The 2006 ELR identified a requirement for 652 ha of employment land. This reflected a very different economic landscape from that

- currently being assessed and exceeds realistic future requirements in purely quantitative terms;
- Sheffield is located at the heart of the city region and benefits from Enterprise Zone status, with ambitious plans to target key sectors through which employment and GVA growth in Sheffield can be generated.

3.0 Economic Context

3.1 This section establishes the economic context of the study by reviewing recent economic conditions and trends within Sheffield in the context of the economies of Yorkshire and The Humber and Great Britain as a whole. This analysis is important in identifying the existing strengths and weaknesses of the City’s economy, as well as those factors likely to influence the nature and level of future demand for employment land.

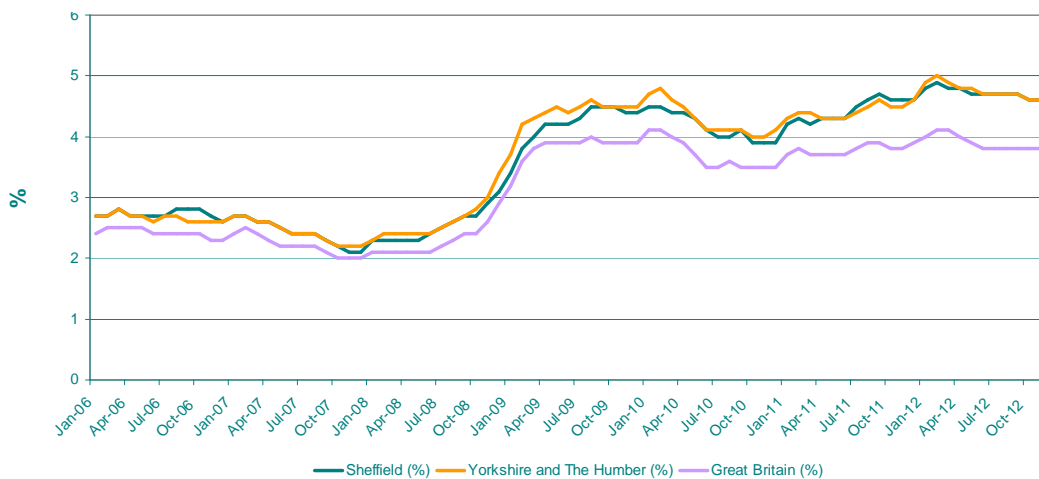
Economic Trends

Economic Activity

3.2 Following a tentative recovery from what was arguably the worst recession since WWII, 2011, 2012 and 2013 (to date) have seen weak economic growth and continuing economic uncertainty, especially in the Eurozone where the sovereign debt crisis has had a significant impact and affected global business confidence. This, combined with austerity measures in the UK, has noticeably affected the Sheffield economy.

3.3 Unemployment in Sheffield, as recorded by the proportion of people claiming Job Seekers Allowance [JSA], is at 4.6% (November 2012). This is the same as experienced across the region as a whole, although higher than the national average of 3.8%. The proportion of male JSA claimants (6.1%) is over twice the female equivalent (2.9%), as experienced elsewhere in the region.

Figure 3.1 JSA Claimant Count



Source: ONS Claimant Count November 2012

3.4 Unemployment has noticeably risen as a result of the recent recession, rising from 2.1% in November/December 2007 to a peak of 4.9% in February 2012. Unemployment patterns and figures are almost identical to those experienced across the region, and follow a very similar trend,

albeit with a higher overall percentage compared with the United Kingdom as a whole.

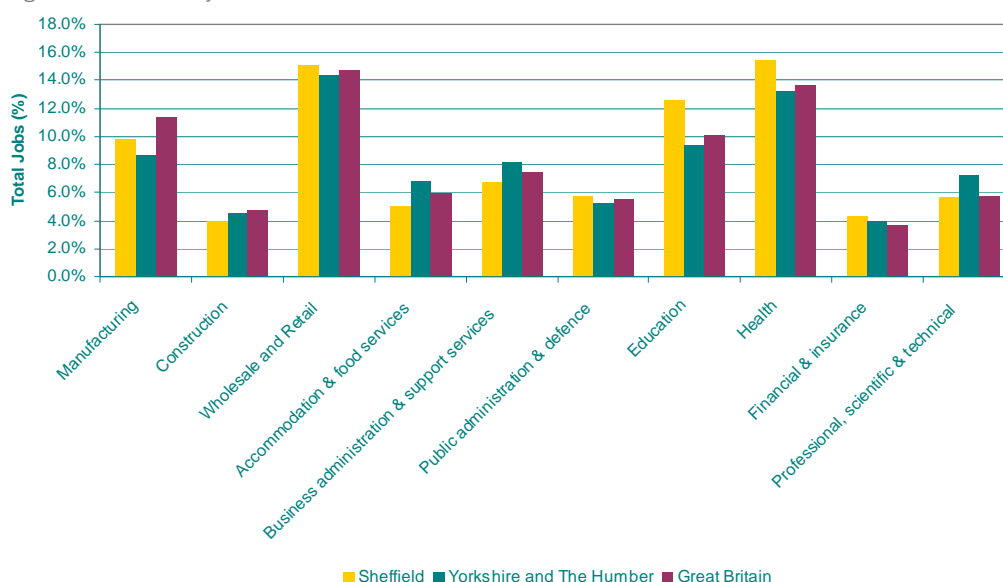
- 3.5 Youth unemployment is lower in Sheffield than both regional and national averages and has fluctuated, albeit with an overall increase in youth unemployment experienced since 2006. It appears that unemployment among the age group 16-24 has begun to fall since 2012.
- 3.6 November 2012 data shows that there were 5.3 claimant (JSA) unemployed workers for every notified job centre vacancy in Sheffield. This was slightly higher than the ratio for Yorkshire and the Humber (4.8) and significantly higher than that of Great Britain (3.8). This suggests that Sheffield's unemployed residents have comparatively poorer prospects of obtaining work in the local area than elsewhere in the country.
- 3.7 Considering the proportion of JSA claimants in the economy does not, however, reflect the true level of worklessness in Sheffield. DWP data for February 2012 indicates that 15.7% of the city's working-age population were claiming key out-of-work benefits (comprising job seekers, incapacity benefits, lone parents and other income related benefits). This is very similar to the national (15.0%) and regional (16.0%) percentages.
- 3.8 However, these headline figures do not accurately reflect the current job situation in the City. The ONS model-based unemployment figure, which is often taken as being a more accurate reflection of the jobs market than JSA claimant counts, suggests a current unemployment rate of 10.4% in Sheffield³ at a significantly higher rate than the national average (8.1%) and slightly higher rate for the Yorkshire and Humber region (9.9%).
- 3.9 In the 2011 Census, the residential population of Sheffield was estimated at 552,700, up from 513,100 in 2001. This represents a change of 7.7% at a very similar rate to the level of national growth at 7.1%.
- 3.10 The number of jobs based in Sheffield has grown at a slightly faster rate than the national average. Over the period 1998-2008, the number of employee jobs in the authority area grew by 10.7%, from 226,578 to 250,889, whereas nationally, a lower rate of growth of 8.7% was observed. Since then, in the period 2008 to 2011, the number of jobs in Sheffield's economy has fallen at rate of 5.4%. This is higher than the rate of decline experienced in Yorkshire and Humber over the same period where jobs decreased by 3.4%, and significantly higher than the rate for Great Britain which reduced by 1.7%.

³ ONS Annual Population Survey, June 2012

3.11 As illustrated by Figure 3.2, Sheffield’s key employment sectors comprise wholesale & retail (15.3%), health (15.2%) and education (12.3%) which all account for a higher share of employment than at the regional or national level, significantly in the case of the education and health sectors. The manufacturing sector accounts for a significant share of employment within Sheffield at 9.7%, at a higher level than the regional level but lower than that experienced nationwide. Public administration and defence accounts for 5.6% of total jobs, a higher rate than regional and national averages. Sheffield has a comparatively low representation in construction, accommodation & food services and business administration and support services.

3.12 The proportion of employment in the typically more dynamic sectors of finance and insurance and professional, scientific & technical activities reflect similar, if not higher, proportions than national and regional averages, with jobs in the finance and insurance sector accounting for 4.2% and exceeding regional and national averages.

Figure 3.2 Key Industrial Sectors 2011



Source: Annual Business Inquiry / Business Register and Employment Survey (BRES) 2011 (Employees)

3.13 Over the period from 1998 to 2008, employment in health and social care was the City’s fastest growing sector, both in percentage and absolute terms (+17,691 employees, +78.9%). Strong growth was also observed in the Education sector (+40.0%) as well as public administration and defence at 34.8%. For all these sectors, the rate of growth observed locally was significantly greater than the national and regional averages. Increases of 11.5% and 34.7% were observed for employment in construction sector and property and related services respectively at rates below national and regional averages.

3.14 Conversely, a number of sectors experienced a contraction in employment over the period. Manufacturing employment fell by -34.2%

in a similar pattern to that experienced across Great Britain (-32.9%), albeit with a more pronounced decline than experienced across the region as a whole (-29.0%). Employment in transport, storage and communication; wholesale and retail trade; and hotels and restaurants also fell in Sheffield despite (limited) national growth across these sectors.

- 3.15 Since 2008, the decline in jobs was not felt uniformly across all sectors. The largest contraction in jobs was witnessed in accommodation and food services (-21.7%), property (-19.1%) and construction (-18.6%). The overall decline was lessened by modest levels of growth in the transport and storage, Information and communication, financial & insurance, and education sectors.

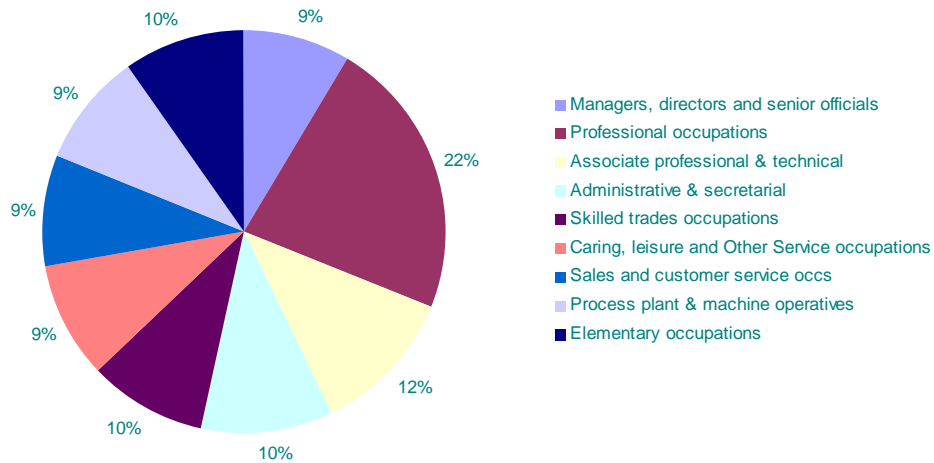
Business Start Ups

- 3.16 Between 1994 and 2007, the number of VAT registered firms in Sheffield increased from 10,460 to 12,375. This represents a growth rate of 18.3% which is lower than the rates observed in Yorkshire and the Humber (19.2%) and Great Britain (25.9%) over the same period and could indicate a relatively weak level of entrepreneurial activity and business health within the City.
- 3.17 However, an analysis of business births over the (post recessionary period) of 2009 to 2011 shows Sheffield as having a significantly higher rate of business births, increasing by 9.2% between 2009-2011 compared to an increase of only 1.4% for Yorkshire as a whole and much nearer to the national figure of 10.7%. From 2009-2011 there was a -12.6% decrease in business deaths in Sheffield compared to much larger decreases for Yorkshire and the Humber (-18.9%) and the UK (-17.2%) suggesting an overall trend of increasing resilience amongst the business community, albeit at a lower rate than that experienced elsewhere in the region and beyond.

Economic Activity

- 3.18 Sheffield has an estimated 280,200 economically active residents, which equates to an economic activity rate of 72.1%. This is slightly below the corresponding figure for both Yorkshire and the Humber (75.4%) and Great Britain (76.5%). This would suggest that there is some scope for further growth in the local economy.
- 3.19 Sheffield has a slightly higher than average rate of self-employment at 8.7% relative to the region (8.0%), but lower than the national performance (9.5%).

Figure 3.3 Employment by Occupation

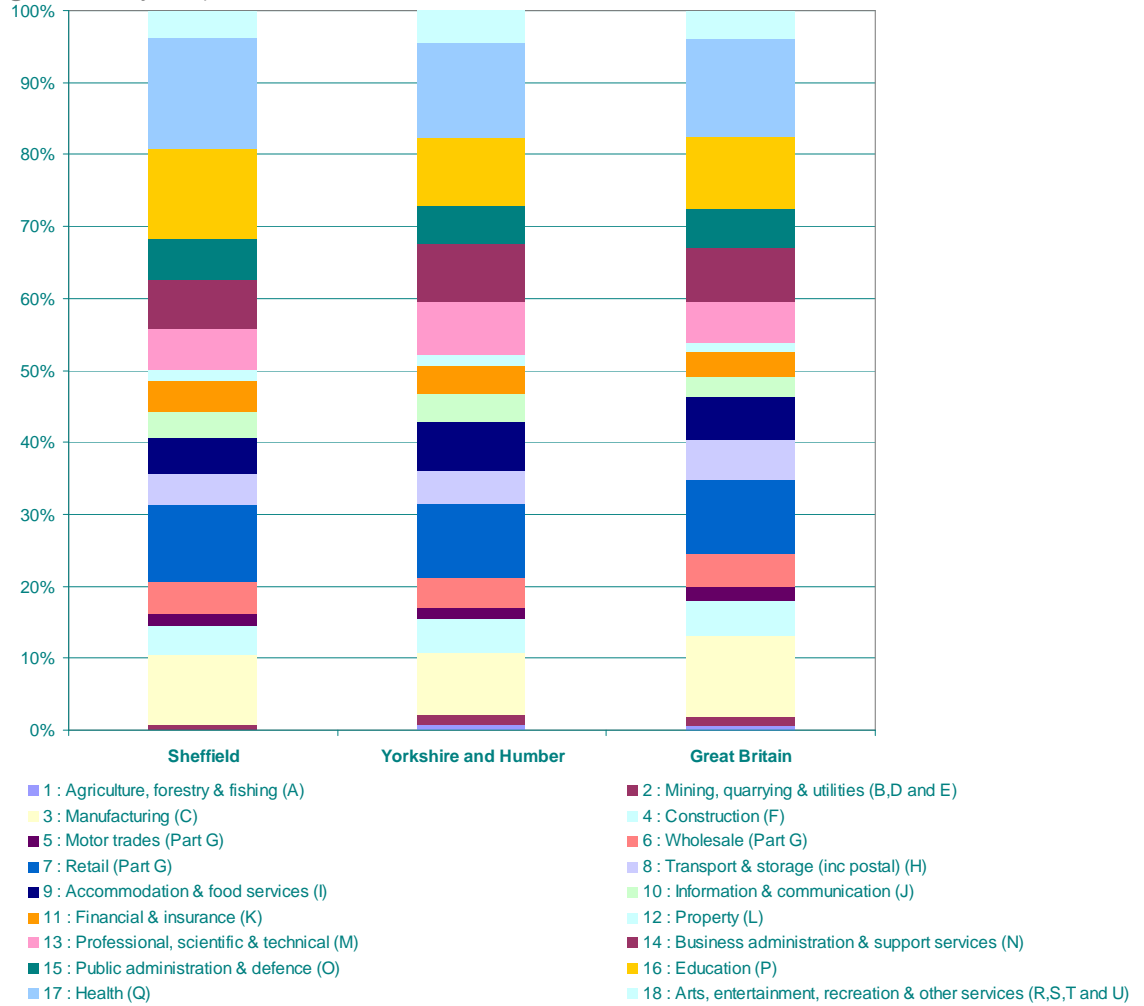


Source: Annual Population Survey (December 2011)

3.20

The profile of Sheffield’s labour force shows that the City has a similar, albeit slightly lower, proportion of highly skilled occupations to the national average, but a higher proportion than the regional average. For instance, financial and insurance occupations account for 4.3% of the workforce in Sheffield compared to 3.6% nationally and 3.9% in Yorkshire and Humber. Sheffield has a slightly lower higher proportion of lower skilled, manual jobs relative to regional and national averages average. Employment in manufacturing is lower than the regional average but higher than national trends. At the same time, the proportion of the labour force comprising of retail, education, health and is well above the regional and national average. The proportion of employment in business administration and support is below regional and national trends.

Figure 3.4 Key Occupational Sectors 2011

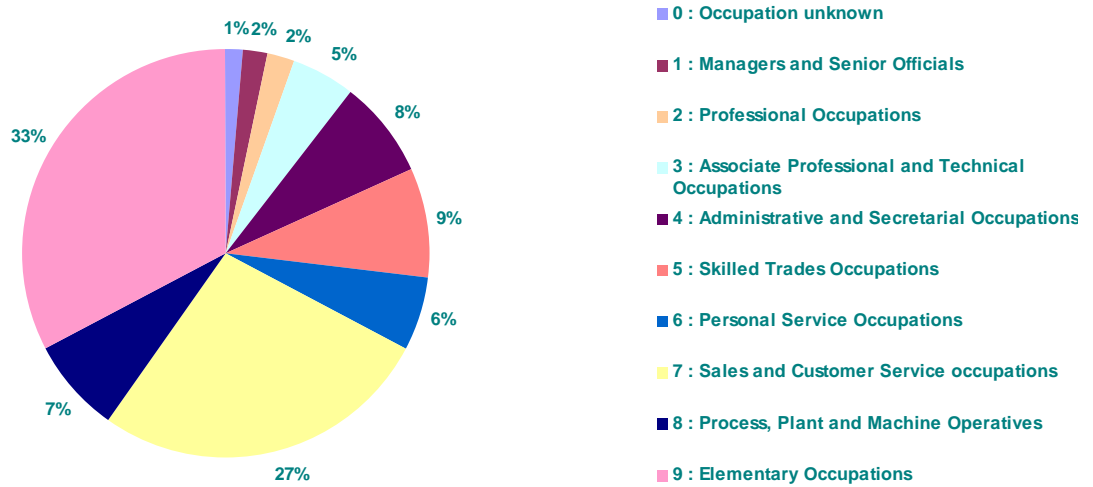


Source: Business Register and Employment Survey 2011 (Employees)

3.21

The proportion of working age residents with no qualification is estimated at 10.0% for Sheffield, which is lower than the corresponding figure at both regional (11.9%) and national (10.6%) levels. Additionally, 32.5% of the City’s working age population is qualified to degree level or above at a very similar level to the national average (32.9%) and higher than that of the region (27.5%) attributable to the presence of two local universities (Sheffield Hallam and the University of Sheffield) and, more importantly, the relatively high proportion of graduates who remain within the local area. This indicates a highly skilled workforce and the corresponding potential to attract more knowledge-based businesses.

Figure 3.5 Key Occupations Sought by Job Seekers



Source: DWP 2012

3.22 An analysis of the types of jobs sought by unemployed residents in Sheffield demonstrates a significant proportion of total job seekers in Sheffield are seeking work in elementary occupations (33%) at a similar level to those seeking such jobs across the region (34%) and nationally (29%). Demand is also high for Sales and Customer Services occupations in line with national and regional demand.

3.23 Sheffield’s total economic output in 2012 was £9,569 million (2009 prices). This represents 0.74% of the total economic output for the UK, and 10.9% of the total GVA for Yorkshire and the Humber. By 2030 Sheffield’s GVA is predicted to account for a slightly smaller proportion of the region’s economy at 10.7%.

3.24 The steel industry represents 5% of Sheffield’s total economic output (2012) compared to only 3% of total jobs. According to Experian’s Quarterly Local Market Forecasts (2009 prices), jobs in the steel industry employed 23,810 people in Sheffield in 1997. This fell to 8,230 in 2012, a reduction of 65%. Experian’s forecasts predict that jobs in the metal industry will decline further still to just 2,450 jobs in 2031 equating to a reduction since 1997 of 90%.

3.25 The impact on total economic output from metal manufacturing jobs in Sheffield, whilst falling, is less pronounced than the rate of job losses in the sector, reflecting the increased use of technology as part of the restructuring of the sector. Gross Value Added (GVA) output for manufacturing steel products fell from £785.58 million in 1997 to £433.41 million in 2012, representing a 45% reduction in GVA. Output is forecast to fall further to £284.18 million in 2031, an overall reduction of 65% since 1997.

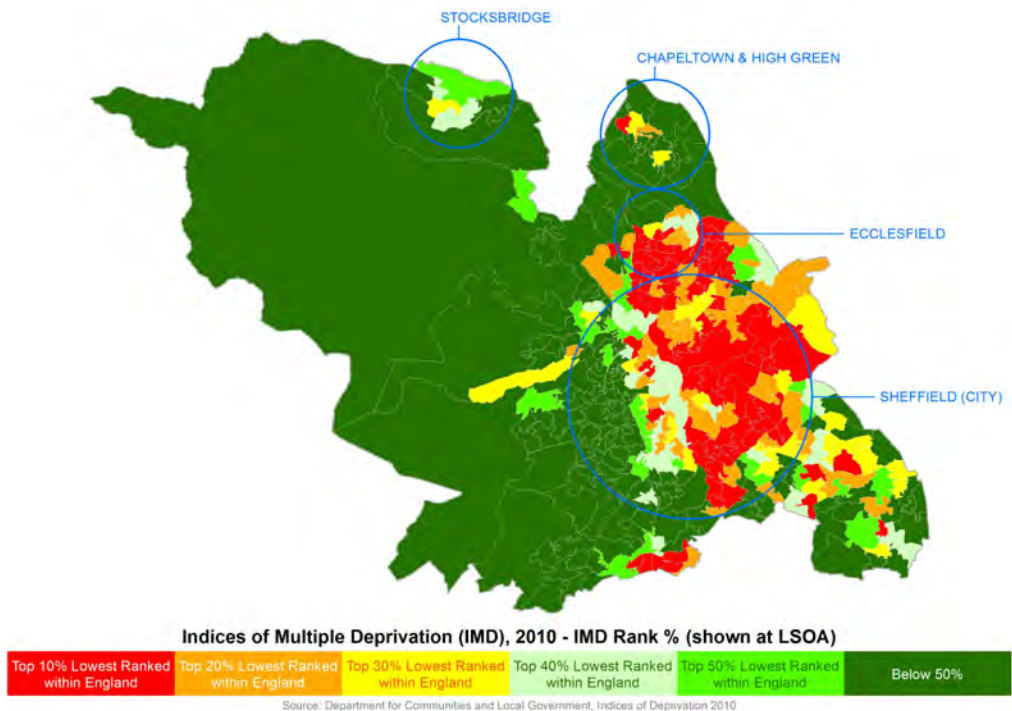
3.26 Gross weekly pay wages in Sheffield in 2012 were 1.3% above the Yorkshire and Humber, but 7.8% below the national average indicating

that jobs available locally pay more than elsewhere in the region but below other parts of the country.

3.27

Sheffield suffers from relatively high levels of deprivation, ranked by the English Indices of Deprivation as the 84th most deprived of 326 English local authorities. Its performance has remained relatively constant, albeit with a slight worsening since the 2007 Deprivation Indices were published, falling from 89th. However, Sheffield is ranked as the least deprived authority within South Yorkshire, above Rotherham (ranked 52nd), Barnsley (ranked 44th) and Doncaster (ranked 39th). Analysis at a more local level (Figure 3.6) reveals much higher levels of deprivation at a local level, with particular concentrations within the City Centre, Ecclesfield and Chapeltown/High Green areas in stark contrast to highly affluent areas to the south and west of the City in suburbs such as Hallam.

Figure 3.6 Indices of Multiple Deprivation 2010: Sheffield City



Source: IMD 2010

Knowledge-based Industries

3.28

All industries are, to some extent, dependent on knowledge inputs. However, some industries rely more on 'knowledge' than others. The term 'knowledge-based industries' usually refers to those industries which are relatively intensive in their inputs of technology and/or human capital. Table 3.1 indicates that 18.7% of firms within Sheffield operate in knowledge-based sectors. This is below the national (21.8%) but significantly higher than that of surrounding local authorities (Doncaster,

Barnsley and Rotherham). Sheffield is mid-ranked compared to other districts in England, 192nd out of 380 authorities.

Table 3.1 Competitiveness Index

Local Authority	2010 (%)
Sheffield	18.7
Barnsley	13.7
Doncaster	13.3
Rotherham	14.0
Great Britain	21.8

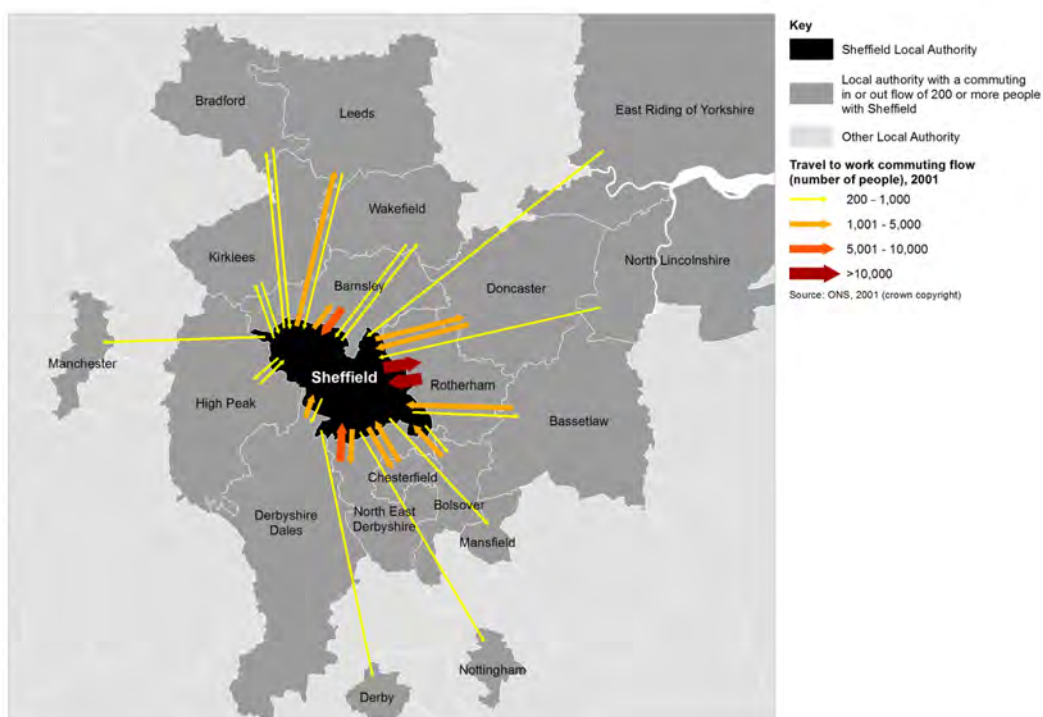
Source: UK Competitiveness Index 2010

- 3.29 More than simply reflecting a high proportion of knowledge based industries, Sheffield has an established track record for advanced manufacturing and engineering. The Sheffield City Region was rated number one Enterprise Zone for Modern Manufacturing and Technology in the UK by the Financial Times magazine. Sheffield's advanced manufacturing sector is therefore well established with opportunities for future growth.

Commuting Flows

- 3.30 As recorded in the 2001 Census, of 182,806 Sheffield residents in employment, 35,669 (19.5%) regularly travelled outside of the City to work elsewhere. Unsurprisingly, the main destinations were the surrounding authorities of Rotherham, Barnsley, North East Derbyshire, Chesterfield, Leeds and Doncaster. At the same time, approximately 60,545 residents of other Boroughs commuted into Sheffield to work – again predominantly from the other adjacent local authorities – equivalent to 33% of all workplace jobs in the Borough being filled by non-residents. The travel-to-work flows yield a net inflow of around 24,876 workers.
- 3.31 An area's self-containment rate reflects the proportion of those residents in employment that work locally, as opposed to commuting elsewhere. In 2001, Sheffield's self containment was high at just over 80%.

Figure 3.7 Commuting Patterns: Sheffield City



Source: ONS Census Data 2001

Summary

- 3.32 To summarise, Sheffield is a large urban authority with a population of circa 550,000. The authority shares borders with Barnsley and Rotherham to the east, Kirklees to the north, North East Derbyshire to the south and High Peak and the Derbyshire Dales to the west. The population of Sheffield is concentrated within the City's main urban areas within which there are areas characterised by pockets of severe deprivation.
- 3.33 Restructuring of the steel industry has led to a massive reduction in traditional manufacturing jobs, with accompanying high levels of male unemployment and a significant proportion of job seekers seeking work in elementary occupations. Having said this, manufacturing is still a significant employer in Sheffield and makes a contribution to Sheffield's overall economic output.
- 3.34 Prior to the recession, the local economy in Sheffield was characterised by lower levels of growth, business health and entrepreneurial activity than regional and national averages, albeit the post recessionary period has seen an improvement in the number of business births and deaths indicating increased resilience amongst the business community.
- 3.35 Employment in Sheffield is dominated by the retail, health and education sectors. The presence of a number of local universities results in a higher than average proportion of highly skilled worked educated to

degree level or above, and a corresponding high proportion of local firms operating in knowledge based industries.

3.36

Table 3.2 summarises Sheffield's particular strengths, weaknesses, opportunities and threats, many of which will have a significant bearing on the City's future employment land requirement.

Table 3.2 SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Low (and potentially) reducing levels of youth unemployment relative to regional and national averages • Sheffield has a high level of self-containment (commuting rate) and a net inflow of workers • Sheffield's local business base experienced growth throughout the economic downturn at rates significantly above the regional averages (albeit these rates are still slightly below the national average and in the context of overall job losses since the first recession) • Business deaths are reducing indicating some resilience amongst the local business base, albeit this is in the context of an overall decline in job numbers • Highly developed infrastructure (trams) and good strategic links • A track record for advanced manufacturing and engineering as an established sector with opportunities to grow • A highly skilled local workforce relative to the regional average • A high proportion of the working age population are qualified to degree level or above • A high proportion of firms operating in knowledge-based sectors, particularly compared with surrounding authorities 	<ul style="list-style-type: none"> • Employment in traditional manufacturing jobs (particularly steel) has witnessed a massive restructuring in recent years, accompanied by a significant, and ongoing, loss of jobs • High and increasing unemployment with a higher proportion of male unemployment compared to national rates • Overall job losses (by circa 10,000 jobs) since the start of the first recession • There are pockets of severe deprivation, particularly in the City Centre and Ecclesfield • Low business density • Higher than average claimant unemployment workers for every job centre vacancy • Weak pre-recession levels of entrepreneurial activity and business health • Unbalanced commercial and industrial stock, with too much outdated office/industrial floorspace in inappropriate locations • Insufficient Grade A city centre office space • A reliance on pre-recession public sector job growth
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Relatively low economic activity rate with scope for further growth in the economy • A track record for advanced manufacturing and engineering as an established sector with opportunities to grow • Development of HS2 represents an opportunity to reduce journey times; increase access to new markets; and free up capacity on the existing rail network for increased transport of freight • Sheffield City Region benefits from Enterprise Zone status with associated financial support and incentives to encourage business start ups in targeted industrial sectors (including advanced manufacturing and materials) • A highly skilled workforce and an influx of graduates from two local universities, a high proportion of whom stay within the local area after graduating • TiF opportunities allowing Sheffield City Council to think holistically about new forms of investment to pump-prime constrained and industrial sites • Electrification of the Midland Mainline to increase journey times from Sheffield to London by 2019. • Improved ICT infrastructure, including improved broadband and wireless networks • Improved journey times between Sheffield and Robin Hood Airport as a result of the Finningley and Rossington Rejuvenation Route Scheme (FARRS) • Improved autonomy for the Sheffield City Region to control spending on skills development, transport and other business support through the City Deal • Establishment of the LEP and Creative Sheffield dedicated to raising Sheffield's profile as a location in which to locate and invest 	<ul style="list-style-type: none"> • Continued economic downturn and the further decline of traditional manufacturing industry/employment and associated contribution to GVA • Increasing polarisation of male unemployment • Further reduction in public spending could undermine growth in sectors with a strong representation (education and health) • Competition for inward investment from neighbouring economic centres (Leeds, Doncaster, Manchester) many of whom are targeting exactly the same high technology sectors that Sheffield City Council has highlighted in its economic strategy • Suggested location for HS2 station at Meadowhall may draw investment away from Sheffield City Centre • Substantial large Brownfield former industrial sites in need of remediation and public sector subsidy before they become viable for redevelopment • Drastically reduced public sector funding opportunities – reliant on private sector investment that is highly risk averse • Failure to deliver the northern part of HS2 and associated failure to realise associated economic benefits

4.0

The Sheffield Commercial Property Market

Introduction

4.1

This section describes current property market conditions in Sheffield and the general area around it, with a particular focus on the South Yorkshire Sub-Region. This includes recent trends in the demand for and the supply of industrial and office premises and the factors affecting these. The analysis is based on data collated by the Valuation Office Agency (VOA)⁴ and Guy Rusling Commercial Surveyors (GRCS) local market knowledge, supplemented by discussions with local property agents and various economic development and business organisations active in the area.

Overview

4.2

Sheffield is an industrial city not, in the true sense of the word, a commercial city as (for example) Leeds and Manchester are. The City's manufacturing and industrial base, and the inseparable relationship with the Universities, remain its principal strengths. What commercial activity there is tends to exist to support and serve local business and industry and generally not to provide those services to a wider market.

4.3

The exceptions to this statement are a number of decentralised operations, predominantly public but also private sector where 'back-of-house' services have relocated to Sheffield to take advantage of the low cost base in respect of property and labour. The most prominent examples of this are HSBC and the Department for Work and Pensions [DWP]. The commercial and industrial property market in Sheffield is reflective of this fact.

4.4

The attractions of Sheffield to industry, the service sector and internal market include:

- Its central geographical location in relation to the UK as a whole;
- Access to a substantial labour force which, over many generations, has built up a world-renowned engineering and manufacturing skill base;
- An affordable and loyal workforce, the latter partly a function of necessity following the decline of manpower requirements of the traditional industries;
- Good access to relatively uncongested road and rail infrastructure, with further enhancements proposed;

⁴ The VOA prepares a comprehensive and current list of commercial premises for rating purposes. Summary data from the VOA is published by the government from time to time and is useful for broad-brush analysis of so called bulk use classes.

- Sheffield University and Sheffield Hallam University;
- High quality amenity value of the city centre, suburbs and countryside; and
- The characteristic ‘comfort’ of its people and places.

4.5 Such unattractive aspects of the city that agents and developers have identified included:

- Topography as a limiting factor in the supply of large, flat, accessible sites; and
- Low property values, suppressing speculative development of office space as a feature of the Sheffield property market.

Office Supply/Demand

4.6 The demand for office space is, reflective of the City’s primarily industrial nature. Erecting office buildings does not itself create office jobs and so the development of office floorspace that has been subsidised by public-sector funding and letting incentives above the level of demand has contributed to an over-supply of office space in the City Centre and consequential depressed rental values (see Section 6.0).

4.7 The traditional offices built in the 19th Century (for example in the Cathedral Quarter) meet the modest churn requirements of Sheffield-based professional practices serving a local client base.

4.8 Many of the larger office buildings of the 1960s and 1970s have been substantially refurbished over the past 10 years, the result of which has been to maintain - rather than improve - occupancy and rental levels.

4.9 Office buildings (for example those at the Heart of the City and Digital Campus) that were built post 2000 with the support of public funds have generally been let, although in most cases not without significant incentives and remaining voids. However, this space will be required in future to replace ageing office stock, although due to low rental levels and high yields they would not exist without financial support. The task remains for the ‘overhang’ of space to be taken up before additional supply is created so that values can harden and the City can start to move towards a position where value exceeds cost and development follows.

4.10 Locations such as the West Bar Triangle remain important sites for the future development of City Centre office space, but must be subject to a flexible approach to development proposals to incorporate complementary uses (including non-employment creating uses such as residential) to establish a destination location.

4.11 The out of town office market responds to demand (by and large) from occupiers with a workforce requiring ready access to the motorway

network - and therefore high levels of parking - and for smaller buildings of around 250-1,000 sqm in size.

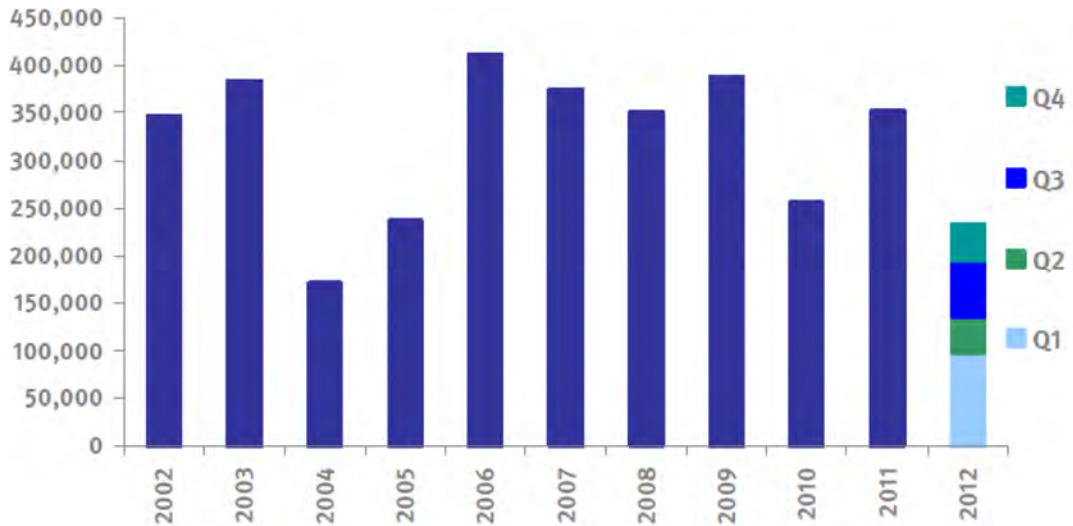
4.12 Although somewhat against the ethos of the sequential test for office space enshrined in The Framework, it was generally the view of commercial property agents that capping the size of office development out-of-town, with the intention of driving occupiers into town, would only work where there was a compelling need to be in that particular city. As this is seldom the case, agents were of the view that such policy-driven attempts to influence the market would only result in ‘footloose occupiers remaining footloose’.

Current Take Up of Office Space

4.13 The office market was considered to be undergoing a resurgence in 2010, reflected in a high number of small-medium sized office deals and a new record headline rent for the City (see figure 4.2) as an indication of the demand for the very best city centre accommodation. The graph below however, indicates that the actual take up of floorspace in 2010 was low in comparison to previous years.

4.14 Information on office take up rates indicates that Sheffield saw a subdued take up of office floorspace in the last quarter of 2012, and a total of circa 19,000 sqm for 2012 at a lower level than take up experienced in 2011. The majority of take up was within the City Centre, rather than in out of centre locations.

Figure 4.1 Office take up for Sheffield City Centre (sqft)



Source: Knight Frank Sheffield Offices Market Update Q4 2012

4.15 In terms of future supply, CTP Developments are giving consideration to commencing the final phase of St Paul’s Place (Phase 3) which will provide up to 9,290 sqm (100,000 sqf) of prime offices in response to live market inquires (discussed in more detail below). Knight Frank also

highlight the potential for a drop in supply of office at Grades B and C as these premises are lost to alternative uses⁵.

Current Office Demand

- 4.16 The 2013 Sheffield Office Stock Study records stable levels of demand overall, in line with current economic trends, with continued demand within the Grade A and B sectors.
- 4.17 Additional commentary from Knight Frank⁶ suggests that market interest in Sheffield is improving, with a number of large inquiries for office space in the region of 929-1,858 sqm (10-20,000 sqft) which should see an increase in take up of office space in 2013 to previous annual levels. Healthy demand has also been seen for good quality refurbished office space in prime locations.

Industrial Supply/Demand

- 4.18 Sheffield has a strong industrial property market with demand across the spectrum, old and new, small and large, with supply and demand being generally in balance.
- 4.19 Present vacancy rates are low (see Section 6.0) and are generally at the minimum that is required in order to provide opportunity for growth, contraction, new entries into the market and natural churn.
- 4.20 The traditional industrial areas followed the valley floors, in particular the Upper & Lower Don and the Sheaf.
- 4.21 The **Sheaf Valley** continues to provide space and be attractive to small scale industry where proximity to and convenience for the local workforce is of greater importance than, for example, access to the strategic road network. Much of the space in the Sheaf Valley is old but remains sufficiently adaptable to meet the needs of the market.
- 4.22 The **Upper Don Valley** is more topographically constrained than the Lower Don and a number of sites are compromised by difficulties with localised access. However, due to the good quality of the strategic road network, land here remains in demand and precisely because of the 'tucked away' nature of some of the sites, remain attractive (and particularly suited) to some of the 'dirtier' uses.
- 4.23 The **Lower Don Valley** has been transformed in the last 20 years. Demand continues to press supply, which manifests itself in maintained rental levels still showing modest growth. The Eastern Lower Don is now being developed and old industrial buildings demolished to facilitate new development.

⁵ Sheffield Office Stock Study, Knight Frank (with the support of Creative Sheffield), 2013

⁶ Knight Frank Sheffield Offices Market Update Q4 2012

- 4.24 A constraining factor is the traffic capacity at M1 Junction 34 (south). The M1 J34 Relief Road (formerly known as The Halfpenny Link and also referred to as the Tinsley Link) is required to alleviate this problem. Developer contributions to the cost of the road have been mentioned during consultation with local residents as forming a barrier to some developments.
- 4.25 The Fund-driven expansion of distribution space between 2000 and 2008 has, however, created an oversupply of industrial units across the UK, some of which remain vacant, a case in point for Sheffield being SIRFT.
- 4.26 The route of HS2, whilst some years away from being fixed and implemented, is nevertheless a matter of concern to land owners and occupiers alike, and will blight a disproportionate number of sites for as long as the precise route, buffer zone, and compensation provisions remain uncertain. SIRFT, referred to above, is currently affected by the draft route proposals, as is the former Tinsley Marshalling yard Europa Link.
- 4.27 The south of the City, at Holbrook and Halfway, provides a number of sites which are allocated for employment but, given that the local infrastructure is generally poor, there is demand for alternative non-employment uses and therefore reallocation of these sites should be considered. Other areas to the south, for example Beighton, offer opportunities to meet demand in this area and have better links to the strategic roads.
- 4.28 Ecclesfield and Chapelton offer a range of industrial space opportunities including the very successful development at Smithy Wood with unparalleled infrastructure, compared to sites at the opposite end of the scale. However there remains a good market across these locations.
- 4.29 In Deepcar and Stocksbridge where there has traditionally been heavy engineering, the compromised infrastructure renders some of the employment allocations (other than those which remain active) inappropriate; demand (such as it is) being met by superior sites and a range of sizes elsewhere to the north of the City.
- 4.30 It is also worth noting the potential role played by the AMP in creating demand, and potential growth, for advanced manufacturing and associated industries. Although the AMP is located in Rotherham, its cross boundary relationship with Sheffield is seen by both Stakeholders and Agents as having direct implications for job creation and economic activity within Sheffield. Expansion plans recently announced⁷ the next stage of development being brought forward at the AMP, expected to

⁷ AMP R-evolution gathers pace - Insider Media Limited 1st May 2013

provide an additional 18,500 sqm of industrial units on a 5 ha site, with a further 32 ha of land available across the remainder of the park. It is therefore increasingly essential to consider the influence of the AMP on future demand for industrial and support services within Sheffield.

Current Industrial Demand

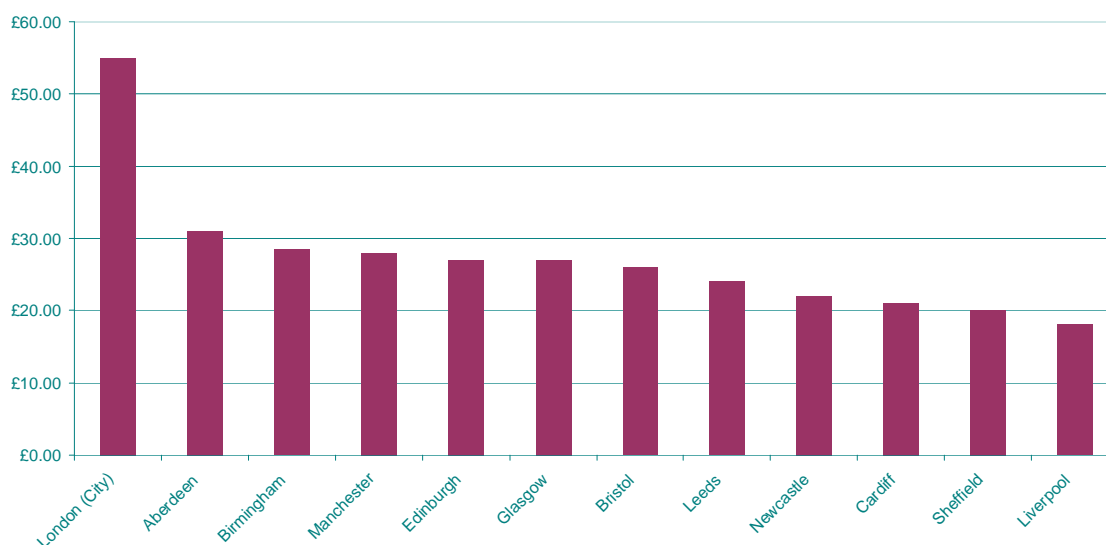
- 4.31 2010 saw a clear revival in the demand for big sheds within the region, which has continued into 2012. Research from Knight Frank indicates that take up of small-scale industrial units (of more than 4,650 sqm) in the latter half of 2012 was at its highest for 2 years at 153,300 sqm.
- 4.32 Demand for small to medium-sized units is reported to have remained robust, with the supply of stock reducing considerably as a result. Demand for medium sized units of 14,000 sqm to 18,600 sqm is also present in the Sheffield market with potential implications for supply.
- 4.33 However, demand for larger (25,000 sqm plus) industrial/distribution units remains low, as witnessed with the large scale B2/B8 units at Shepcote Lane as well as SIRFT, with landlords continuing to offer generous terms to potential occupiers.
- 4.34 Alongside the manufacturing sector, which remains an important driver of demand in the region, there is also rising demand from parcel distributors, prompted by increased internet retail sales. A number of the main operators, including Royal Mail, DHL and TNT, are known to be in the market for new distribution facilities in South Yorkshire.

Rental Levels

Office Rental Levels

- 4.35 Prime rents for office space in Sheffield City Centre achieved a headline of £20.00 psf in 2010, representing a new record high for the City. Sheffield's Grade A office space comprises the second cheapest location outside London when compared to other major centres, with only Liverpool lower. Headline rents in Sheffield are similar to levels achieved in Cardiff and Newcastle (Figure 4.2).

Figure 4.2 Headline Office Rents for UK Regional Centres



Source: Knight Frank Global Office Rents ROMP Q1 2011

4.36 Sheffield's headline rent lags behind Leeds (£24 psf), although perhaps not to the extent that might be expected as Leeds is one of the major commercial centres of the north. Sheffield has significantly higher headline office rents than Rotherham (£12.50 psf), Barnsley (£15.00 psf) and Doncaster (£14.00), illustrating the importance of Sheffield to the regional office market.

4.37 Furthermore, research by Knight Frank⁶ highlights Sheffield as one of only three of the UK's 11 key regional markets to see prime headlines rise in 2011⁸ commensurate with agents' experience of a rebound of office market activity in Sheffield City Centre. As with the office market experienced in other major centres, Sheffield's headline rents may be artificially inflated as a result of generous 'rent free' periods and other incentives. Nevertheless, relatively high levels of office rental growth in recent years is positive in suggesting a potential to attract interest from developers and investors to develop new office space in Sheffield in the future and aid with the pipeline supply of Grade A office space.

4.38 Commentary by Knight Frank suggests that whilst rental terms are likely to remain generous, rent-free incentives are expected to harden on prime buildings as the available supply of Grade A office space in Sheffield is taken up with the potential for diminishing stock levels of high quality office space to create positive pressure on office rents and capital values⁹. However, downward pressure on rental levels for poorer stock is expected to increase due to the high levels of availability and low levels of take up.

⁸ 2011 Sheffield Market Activity Report – Knight Frank

⁹ Sheffield Office Stock Study, Knight Frank (with the support of Creative Sheffield), 2013

- 4.39 Headline rents for out-of-centre office space are generally cheaper than for City Centre locations, and were around £12.50 psf in the last quarter of 2010.

Industrial Property Rental Levels

- 4.40 For industrial property, rents in Sheffield are very similar to other centres in South Yorkshire, averaging at £5.00 per sq.ft for small industrial and warehouse units; £4.75 per sq.ft medium units; and £4.50 per sq.ft for large units (Table 4.1). This demonstrates that demand for such units and activities is generally similar, if not slightly higher, in Sheffield when compared with adjoining authorities.

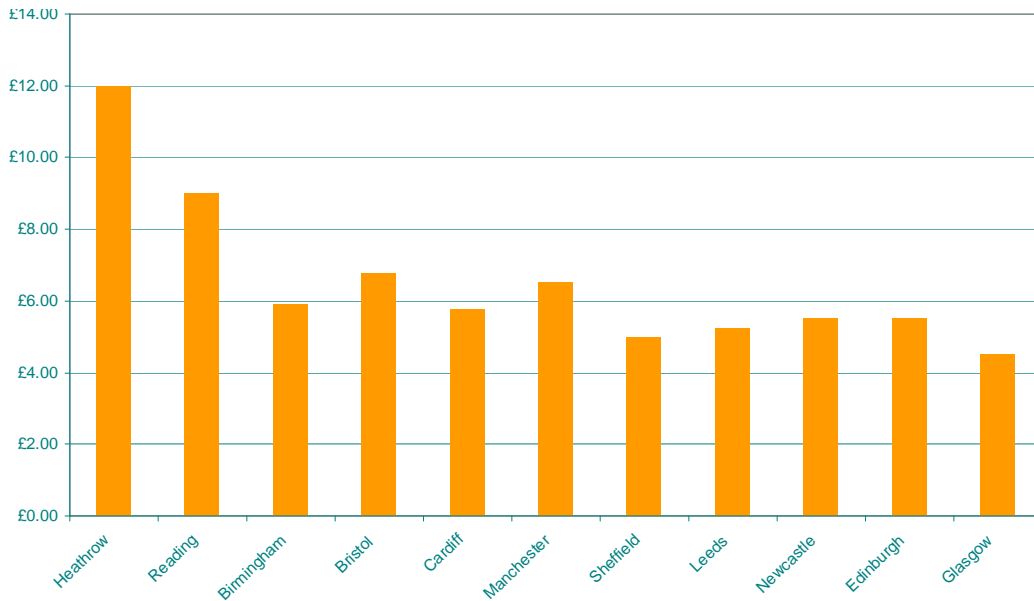
Table 4.1 Industrial Headline Rents

	Small Industrial / warehousing unit rents (£psf)	Medium Industrial / warehousing unit rents (£psf)	Large Industrial / warehousing unit rents (£psf)
Sheffield	£5.00	£4.75	£4.50
Doncaster	£4.75	£4.75	£4.50
Rotherham	£4.75	£4.75	£4.50
Barnsley	£4.75	£4.75	£4.75

Source: Knight Frank Logistics and Industry Commentary H2 2012

- 4.41 Industrial rental levels in Sheffield are comparable (albeit slightly lower) with other locations nearby such as Leeds and Manchester, as well as locations further afield such as Cardiff and Edinburgh. Rents are significantly lower than prime industrial locations in West London (Heathrow) and Reading, demonstrating that demand for industrial and warehousing activities is lower within Sheffield, and South Yorkshire more generally, when compared with these prime locations. However Sheffield offers a competitive advantage akin, if not better, than comparable northern destinations.

Figure 4.3 Headline Industrial Rents for Selected Centres



Source: GVA Rating Revaluation 2010 (Sheffield figure taken from Knight Frank LOGIC Research 2012)

4.42 Commentary by Knight Frank suggests that, with the exception of very large-scale shed developments which will continue to be difficult to let, reduced supply resulting from increased take up is likely to lead to the reduction of incentives in 2013, with the possibility of a growth in headline rents in respect of the small-to-medium sized industrial sector.

Inward Investment

4.43 Sheffield has achieved some notable inward investments over the past 20 to 30 years including with the Midland Bank (HSBC); Manpower Services Commission (DWP) and Abbey National (Santander). Inward investment from the service sector into Sheffield is strongly driven by the low cost base in respect of labour and property but also by the high quality of life referred to above, as the City's amenity value lies in the quality of its environment; competitive housing costs; access to the Peak District; and the unique Sheffield experience which is often referred to as 'the largest village in England'.

4.44 In contrast, inward investment by industry is driven more by the opportunities to take advantage of Sheffield's historic engineering and manufacturing skills base; entrepreneurial attitude and, significantly, the academic and research excellence of the two universities, whose development goes hand in glove with the industrial and manufacturing legacy of the City.

Needs of Local Businesses

4.45 Local commercial and industrial businesses require a supply of appropriately located, affordable buildings that meet their functional

requirements. To be clear, this does not mean that all office space must be AAA-rated, nor that all industrial property is to be state of the art; rather, there must be an available supply of property of all sizes and standards that meets the needs and budgets of all businesses.

4.46 That said, Sheffield clearly has an oversupply of office property at all size and standards. Until this oversupply is substantially occupied, rental values will remain low. This is not to say that individual sites may not be developed in response to a specific requirement on a pre-let basis. It follows, therefore, that the service sector is more than adequately provided for in respect of available office space.

4.47 Local business needs for industrial property are much more closely related to the present level of supply. Consequently, high quality space in strong locations (such as Smithy Wood) continues to be developed despite the unfavourable economic climate. Large level sites close to the strategic road network and with good infrastructure must continue to be provided.

Potential Future Growth

4.48 The commonly held view of agents and developers is that Sheffield should continue to play to its strengths. This means industry first and foremost, with the service sector coming second. The evidence through difficult economic times is that the industrial demand holds good. This must be catered for through the provision of well-located, serviced sites and a focus on quality and location rather than a scatter gun approach to the supply of industrial land.

4.49 For example, the allocation of sites in Deepcar is considered by agents to be fairly meaningless and protection of those allocations therefore inappropriate. Similarly the protection of employment allocations to the south east of the City does little to add to the quality of the employment land stock required by those industries seeking to come to and expand in Sheffield and could be released for housing or alternative non B-class uses such as retail or leisure.

4.50 Conversely, ensuring that there is a supply of good quality land in those areas where infrastructure and strategic access is good and the promotion of those sites is critical to securing future growth.

4.51 The office market is over-provided with individual site allocations and existing unoccupied buildings. A flexible approach to alternative uses for isolated and non-strategic sites should be adopted. Strategic sites in the City Centre and Meadowhall are needed to accommodate relocation and decentralisation requirements and to create dedicated office locations by focusing on a few good sites in strong, well served, locations. Piecemeal provision of sites for offices is unnecessary and could compromise alternative development opportunities in the future.

Conclusions

- 4.52 The margin of supply over demand for industrial sites is around 5% and this is considered to be too low to ensure an adequate future supply. Furthermore, these figures refer to total supply and take up. This disguises the need for a continued supply of well-serviced sites to meet the requirements of businesses seeking to locate in Sheffield to take advantage of the established benefits referred to earlier (including the skilled labour force, the Universities, affordable cost base and quality of life). To achieve this, initiative is required by both the public and private sectors to form joint ownership/stakeholder alliances to ensure that suitable sites in appropriate locations can be brought forward.
- 4.53 The annual uptake of office space is circa 20% less than availability and so further substantial levels of provision are not required and indeed could create further disadvantages in that it would perpetuate low rental levels and the adverse consequences that would flow from that. Reallocation of poor office sites, or a more flexible approach to alternative development proposals if this hastens the re-balance of supply and demand, would enhance strong sites in strategic locations and areas of demand.
- 4.54 Protecting the allocation of poor sites is meaningless and may compromise good alternative development opportunities, not least, in some cases, residential development. Employment land that is undevelopable, for whatever reason, does not add to the availability of employment land and would conflict with the ethos of The Framework.
- 4.55 The message from agents and developers is therefore clear: Sheffield needs the provision, promotion and securing of quality industrial and offices sites and not the plethora of indifferent-to-poor sites that it has at present.

5.0 Stakeholder Consultation

Introduction

- 5.1 The study has been underpinned by extensive stakeholder engagement. This section of the report provides a summary of the main findings that emerged from the various consultation exercises undertaken to inform the work.
- 5.2 The stakeholder engagement and consultation undertaken comprised face-to-face meetings and telephone discussions with 12 key stakeholders. This included discussions with relevant business stakeholders in key sectors; Creative Sheffield; local agents with a thorough knowledge of Sheffield's economic development property market; representatives of adjacent Local Authorities; and Sheffield City Region Local Enterprise Partnership [LEP].
- 5.3 The consultation took the form of a combination of face to face and telephone discussions where appropriate, including an agent stakeholder workshop.
- 5.4 A summary of this consultation process is presented below.

Stakeholder Interviews

- 5.5 Consultations were held with a range of key stakeholders to help inform the development of the ELR. NLP attended face-to-face meetings with representatives from Creative Sheffield, Sheffield City Region Enterprise Zone, South Yorkshire Passenger Transport Executive [SYPT], and Rotherham Metropolitan Borough Council [RMBC]. NLP/Guy Rusling attended a workshop with representatives from Cordwell Developments, Crosthwaite Commercial, CBRE, BNP Paribas, Knight Frank, Fowler Sandford, St Pauls Developments and Henry Boot Developments. Further email and telephone discussions were undertaken with Barnsley Borough Council.
- 5.6 These consultations were used to discuss the current and future role of Sheffield within the regional and sub-regional economy, in addition to the existing opportunities and constraints of the local authority as a business location.

Summary Findings

- 5.7 The key findings and main issues raised include the following:
- a Two main markets were identified within Sheffield, Office (B1) and Industrial (B2, B8), neither of which mix particularly well together;
 - b The key areas of employment land highlighted for economic growth in Sheffield were the City Centre and the Lower Don Valley.

Office Market

- a The overall market consensus was that Sheffield City Centre does not have a particularly strong office offer, and that much of the stock built before the recession has now been taken up, resulting in a lack of Grade-A office accommodation. It was suggested that this has acted as a major blockage to growth within Sheffield, and a major reason contributing to Sheffield losing out to other cities, such as Leeds and Manchester;
- b Creative Sheffield recognised a need for an appropriate Central Business District [CBD], and that defining a suitable boundary was a priority. The CBD would form the central prime location for new Grade A office development in the City;
- c Although there are Grade A offices along the Ring Road, these are not in the prime central locations which the office market requires;
- d HSBC's IT department is located in Sheffield City Centre and is one of the largest offices in the region and comprises a significant part of Sheffield's office market. To retain and attract similar companies, the office market offer within the City Centre must improve;
- e Overall it was considered that the perception of Sheffield was largely as an industrial and manufacturing location due to historical links to industries such as steel. The general perception for office space is poor, aside perhaps for public sector offices;
- f Besides not having appropriately located and varied office space, it was considered that Sheffield City Centre's leisure and retail offer is also relatively weak in comparison to other cities such as Leeds, Manchester and Birmingham. Leisure and retail are seen as essential attractions to the City Centre office-based market; their ongoing weakness was described as the 'post Meadowhall effect'. As such, improving the retail and leisure offer within the Centre is seen as being essential to continue to grow the City's office market;
- g The Sevenstone redevelopment is seen as a fundamental part of Sheffield's ability to compete with other office markets elsewhere.

Industrial Market

- a The agents all agreed that the industrial market in Sheffield is strong, particularly for indigenous uses. Many were of the view that there is little or no inward investment beyond a very small number of inquiries;
- b Current demand for industrial space outweighs supply. Sheffield is suffering from a shortage of quality modern stock, whilst there is also a shortage of deliverable and competitively-priced development land;

- c Creative Sheffield were of the view that current site allocations provide an appropriate supply; however, these sites are inappropriate for anything other than manufacturing as they are predominately in existing industrial areas and viable alternatives are difficult. Conversely, the agents stated that there was an overall shortage of deliverable industrial land in Sheffield, but especially for B8 use;
- d The main growth sectors were considered by Creative Sheffield to be advanced manufacturing and materials, professional and financial services, creative and digital industries, energy, environmental and low carbon industries and healthcare technologies. Based on the current market in Sheffield, agents and developers considered that some of these growth sectors were unrealistic. It was also noted that a tendency to focus towards the more high-end industrial market (such as advanced manufacturing), could lead to opportunities being missed further down the scale;
- e Creative Sheffield commented that although overall there has been a decline in the number of manufacturing jobs, they were seeing pockets of growth in the material and engineering manufacturing sector. A trend of manufacturing returning to Sheffield, especially in the supply chain industry was noted. This was said to be due to product quality and specialism of skills within Sheffield;
- f Creative Sheffield also held the view that Sheffield still has a strong manufacturing legacy within the Steel industry. For this reason, Sheffield has a high number of skilled workers in this sector. Although overall manufacturing levels have declined, there has been an increase in niche manufacturing and engineering. Companies that took their business over seas are now returning to supply chain companies for higher quality, and manufacturing businesses with Sheffield postcodes are seen as providing a better quality of products and service;
- g Sheffield agents were clear that Sheffield has a very good entrepreneurial business sector, making up the backbone of Sheffield, which, as a sector, can often be overlooked;
- h Although jobs numbers were declining in manufacturing, the agents noted that this didn't necessarily relax the requirement for B2 employment floorspace;
- i Overall, it was agreed that one of the main issues faced in Sheffield, as with most places in the current economic climate, is the lack of speculative development. Some developers are not building even with an end-occupier lined up, due to lack of funding from banks. However, agents suggested that there are some developers beginning to look for appropriate and viable land, especially to serve the small/medium-size industrial market;

- j The consensus of the property agency sector was that there remains a shortage of good quality modern industrial buildings in the size range 1,860 – 9,290 sqm with no indication that this will be addressed over the next 1-2 years.

Cross Boundary Issues

- a Both Rotherham and Barnsley ELRs were undertaken in 2010. Doncaster was adopted in 2009 and Chesterfield was incorporated within the Nottinghamshire County Council and Partners – East Midlands Northern Sub-regional ELR. None of the above requires Sheffield to supply any employment land to meet the needs of their neighbouring authority areas;
- b Since Rotherham and Sheffield effectively function as a single economic unit, Rotherham Metropolitan Borough Council (RMBC) suggested that allocated employment sites within Sheffield would contribute to meeting employment land needs in Rotherham. Given the limited availability of large scale employment sites within Rotherham, new employment sites would likely need to be allocated on Green Belt land. It follows that allocations made within Sheffield which help to contribute to Rotherham’s employment land needs could reduce the future requirement for allocation of Green Belt land;
- c The Advanced Manufacturing Park (AMP) is a key employment site within Rotherham. The potential to expand AMP is being considered by RMBC. Policy dictates the type of employment allowed at the AMP and Rotherham are keen to resist broadening the high-end manufacturing focus of the location.
- d The AMP is a key cross-boundary site between Sheffield and Rotherham. Stakeholders commented that it is key to Sheffield’s future growth and hoped that it will continue to create jobs and attract supporting trades and supply chains to Sheffield. It was suggested that some supply chain companies may be reluctant to locate to the AMP as they did not wish to be solely associated with companies on the AMP;
- e Rotherham, Sheffield and Barnsley all have successful business start up rates. Since the recession, there have been more start ups in Sheffield, and these appear to have more staying power than in many other cities;
- f RMBC also identifies Hellaby as a key industrial site and Templeborough (Tinsley) as a key cross boundary employment area;
- g Land off the Dearne Valley Parkway, Hoyland (with Barnsley), forms part of the Sheffield City Region Enterprise Zone. The Barnsley Local Plan may allocate around 150ha of employment land in the Hoyland area.

- h Chesterfield Borough Council highlight Chesterfield as an employment centre in its own right, but recognises that it has functional economic links with Sheffield as part of the wider City Region travel to work area;
- i All Sheffield neighbouring authorities are apart of the wider Sheffield City region, feeding into the Economic Strategy with a shared approach to securing inward investment.

Transport Issues

- a The Sheffield City Region (SCR) Transport Plan has a primary goal for the transport system to support the economic growth of the SCR. This will involve developing public transport links that connect people to jobs and training opportunities in both urban and rural areas, creating new links to major regeneration zones (for example: in Waverley, the Lower Don Valley). SYPTE recognises that good connectivity is essential for a thriving economy. A high quality transport network as it allows for the efficient use of resources and can expand the employment catchment areas of businesses;
- b A61 Penistone Road is a strategic road that suffers from congestion. It is recognised that the upgrade of the A61 corridor into Sheffield will support the regeneration of the Upper Don Valley. The scheme forms a key phase of the Upper Don Physical Regeneration Strategy;
- c Poor quality infrastructure, especially for industrial road transport was highlighted as a key issue by the agents interviewed and is seen as restricting development;
- d SYPTE are pursuing the proposed “tram-train” scheme between Sheffield and Rotherham. The scheme will expand the existing tram network by enabling tram access to the existing rail network, thus facilitating tram services currently terminating at Meadowhall to continue towards Rotherham. RMBC view the train-tram project as a key for both Sheffield and Rotherham residents to access employment;
- e SYPTE understand there is a need to better integrate the labour markets of Sheffield and Rotherham by improving connections between the two centres, tackling the severance caused by the M1;
- f In addition Sheffield City Council proposes to also build the Tinsley Link connecting Meadowhall Way to Sheffield Road. The Tinsley Link would then form a key part of the proposed Bus Rapid Transit (BRT) Northern Route scheme. BRT services would run from Sheffield centre to Rotherham centre, through the Lower Don Valley. Priority measures, such as bus lanes and signal detection, will provide faster running times and improved reliability;

- g The proposed HS2 route is seen as being significant enough to add uncertainty, causing sterilization of some sites and issues in marketing these sites affected;
- h Sheffield is seen as being at a disadvantage by many due to the lack of an airport. However, it was noted by both the agents and SYPTE that the City does benefit from having three airports located close by. Doncaster Airport is the closest, with Manchester and East Midlands being no more than two hours away. Further transport improvements would also reduce the travel time to these and therefore reduce the requirement for Sheffield to have its own airport.

Local Enterprise Partnership

- a The Local Enterprise Partnership's [LEP] role is to add value to the Sheffield City Region where it can, and bring inward investment into the area under its control;
- b The LEP is focused on the Regional Growth Fund and the Enterprise Zone, attracting businesses and offering options on employment land;
- c Some stakeholders were of the view that the LEP was placing too much emphasis on larger inward investment businesses, specifically in high-end manufacturing. Sheffield's agents suggested that the City's main market is local and that this should not be overshadowed by over-ambitious aspirations;
- d The Enterprise Zone is seen in a mixed light. Whilst generally welcomed, particularly by the LEP and Creative Sheffield, it was felt by the property agency sector that the incentives on offer in the area were, in many cases, not sufficient to attract speculative development in the current market. The agents also felt that many end occupiers are put off by the high minimum levels of investment to qualify, which many agreed are unachievable;
- e A key issue raised was that much of the land left over in industrial areas tended to be in multiple ownership, which makes land assembly complicated and difficult. The LEP indicated that this was an issue they were aware of and seeking to address.

Conclusions

5.8 The key messages to arise from the various consultation exercises can be summarised as follows:

- Sheffield does not have a sufficient supply of Grade A office space within areas of high demand;
- There is a need for better retail and leisure provision in Sheffield City Centre in order to attract new occupiers and stimulate additional investment in the City Centre;

- Sheffield is very well located geographically and benefits from excellent transport links (including access to motorways, airports, and public transport) which will only improve through regional transport strategies and the introduction of HS2;
- Sheffield provides a unique manufacturing offer with a strong international brand ('Made in Sheffield') resulting in a strong local industrial market which makes a significant contribution to the local economy;
- The AMP provides a key cross-boundary employment site contributing to employment in both Sheffield and Rotherham, particularly in terms of established supply chains which has the potential to stimulate future economic and employment growth in both local authorities.

6.0 The Current Stock of Employment Floorspace

Introduction

6.1 This section provides an overview of the current stock of employment space in the City, as well as recent trends in, and changes to, supply. The future pipeline of development in Sheffield and historic losses of employment land to alternate uses are also examined. The analysis draws upon data on commercial floorspace from the Valuation Office Agency (VOA), NOMIS, commercial property databases and marketing material and Sheffield Council's monitoring data on employment development.

Main Employment Areas

6.2 The main existing employment areas within Sheffield are:

- **Sheffield City Centre** – this area forms the priority for new large scale and high density office development. City Centre Priority Office Areas are identified, where particular types of office development are to be promoted and encouraged:
 - *The Heart of the City and Eyre Street* - prestige office accommodation;
 - *Moorfoot and Charter Row* - HQ buildings and high quality offices;
 - *The Digital Campus and Sheaf Valley* - digital, creative and knowledge based industries;
 - *Castlegate* – for professional, financial and legal services; and,
 - *Locations along the new northern Inner Relief Road and Tenter Street* - particularly for professional, financial and legal services.
- **Upper Don Valley** –comprises the area within Sheffield where metal manufacturing activities were traditionally located.
- **Lower Don Valley** – traditionally the other key industrial driver of the City, now increasingly characterised by high technology manufacturing and knowledge based industries which is intended as the area's future focus.
- **The Sheaf Valley (Heeley Area) and the Blackburn Valley and Orgreave** – established employment areas (industrial and warehousing) within the main urban area;
- **Meadowhall and Tinsley Park** – established out-of-centre locations for office development; and

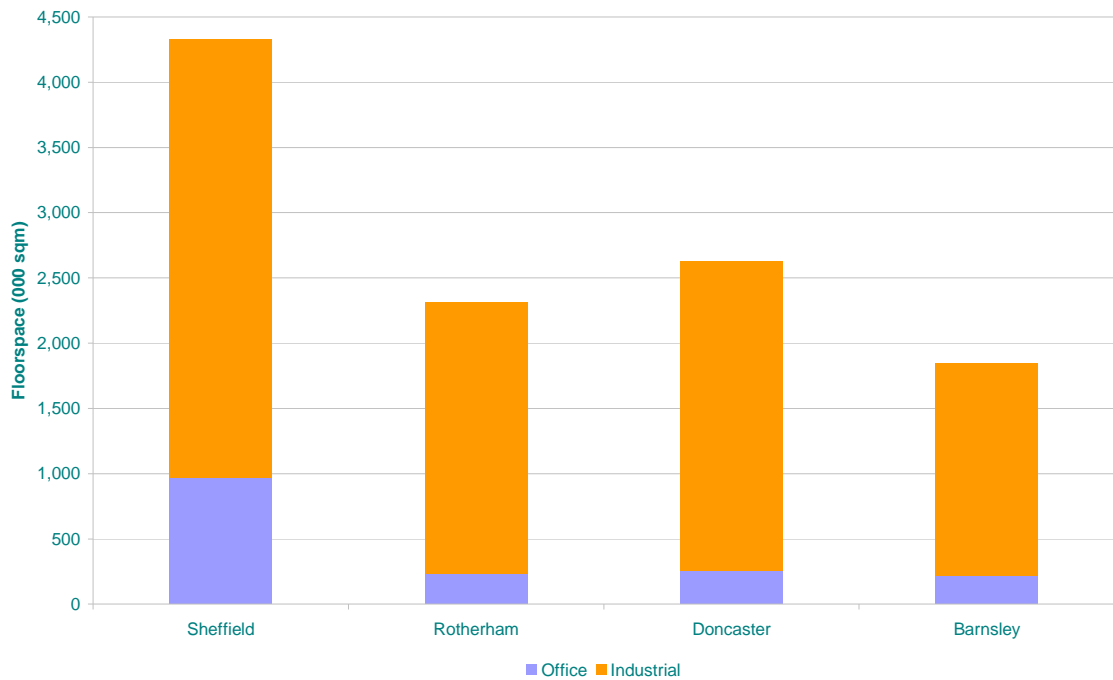
- **Other outlying areas** including Mosborough/Woodside/Woodhouse; Chapeltown/Ecclesfield; and Stocksbridge/Deepcar, as well as the M1 corridor and key transport interchanges.

Stock of Employment Floorspace

6.3

According to VOA data¹⁰, Sheffield has a total of 4.33 million sqm of employment floorspace, comprising 3.36 million sqm of industrial (B2 and B8) floorspace and 973,000 sqm (B1a) office. The total amount of B-class employment floorspace in Sheffield and the other South Yorkshire authorities is shown on Figure 6.1, separated into industrial and office uses. This indicates that Sheffield has significantly more employment floorspace than the other South Yorkshire authorities, and almost four times the amount of B1a office space, highlighting the prominence of Sheffield within the Sheffield City Region and its significance within the City Region’s office market.

Figure 6.1 Total Employment Floorspace



Source: VOA, 2012

6.4

Whilst Sheffield has a greater total employment floorspace stock than that of neighbouring local authorities, and a higher supply of office space per capita (1,760 sqm per 1,000 of the population), the City actually has a relatively moderate amount of industrial floorspace per capita, with levels significantly lower than those achieved in Rotherham, Doncaster and Barnsley.

¹⁰ Valuation Office Agency (VOA), Business Floorspace (Experimental Statistics) May 2012

- 6.5 Historic VOA floorspace data suggests that Sheffield has experienced a modest 22,000 sqm reduction in the total amount of employment floorspace over the period 2000 to 2012, equivalent to a 0.7% reduction in its total stock. This overall loss is made up of a 37% increase in the amount of office floorspace (262,000 sqm) against a 19% reduction (284,000 sqm) in industrial (B2 and B8) floorspace. Sheffield was the only authority in South Yorkshire to experience a reduction in total floorspace over that time period, and demonstrates a rebalancing of the stock towards office uses following a fall in demand for industrial premises. Barnsley experienced the largest increase in B1 office space, at 41% (albeit from a much lower base than Sheffield).
- 6.6 NOMIS data provides an alternative source of information relating to employment land by type (B1, B2 and B8) up to 2008. The data indicates that in 2008 Sheffield had 5.31 million sqm of employment floorspace, of which 20% was B1 (office space), 56% was B2 (factories) and 24% was B8 (warehouses) which also suggests a restructuring of employment space in recent years towards a greater proportion of office space at the expense of warehousing and industrial floorspace.

Emerging Supply of Employment Floorspace

- 6.7 An analysis of Sheffield's development pipeline can help to understand the projected future supply of employment space. This ELR has considered data provided by SCC detailing applications received by the Council on those sites assessed as part of Chapter 9, as well as additional sites considered to form part of Sheffield's potential future employment supply. It is possible that some smaller sites and schemes with planning permission have not been recorded and/or provided as part of this data but such applications would not introduce a significant amount of new supply.
- 6.8 Excluding extensions and changes of use, there are four extant planning permissions for new industrial (B2/B8) development, equating to 44.0 ha; 32.42 ha of which is approved at Smithywood, Chapelton for B2/B8 development. Extant planning permissions for mixed office & industrial development equates to a further 2.44 ha, whilst 5.16 ha of land has permission for B1 office development. Together these permissions have the potential to provide 51.6 ha of additional employment floorspace.
- 6.9 SCC collates the amount of office floorspace approved for annual monitoring purposes, with an indication of the likelihood of development. The latest figures (as of November 2012) indicate a total of 173,157sqm approved office floorspace likely to be developed across the City, 104,093 sqm (or 60%) of which will be developed in central, or edge of centre locations (just short of the 65% target within the Core Strategy/SDF).

6.10 An application for mixed use development including 1,200 sqm B1 offices and 240 sqm B2 workshops is currently being determined by the Council. Two other approved planning permissions providing mixed use, town centre schemes incorporating 11,200 sqm of B1 office development have expired.

Vacancy Levels

6.11 An historic overview of vacancy levels in Sheffield (using ONS data) indicates that Sheffield had a local vacancy rate of 9% in 2005. This was slightly above the regional rate for Yorkshire and the Humber (which was 8%) but was similar to the national rate following a prolonged period above the average for England and Wales. However, despite national and regional increases in the vacancy rate since 1998, Sheffield's vacancy rate has remained virtually static at around 9% to bring Sheffield more in line with national trends.

6.12 Vacancy levels in Sheffield were higher than those in Barnsley, which has historically experienced vacancy levels below regional and national averages, but lower than Doncaster. Vacancy rates in Rotherham fluctuated significantly in recent years but as of 2005 were at a very low rate of 5%.

Table 6.1 Commercial Property Vacancy Rates 2004/05

Local Authority	Vacancy Rate
England	9%
Yorkshire and the Humber	8%
Sheffield	9%
Barnsley	6%
Doncaster	10%
Rotherham	5%

Source: Nomis, VOA

6.13 A review of commercial property being marketed in February 2012 indicated a total of around 140,000 sqm of industrial space available (equivalent to approximately 4% of the total industrial stock) across the local authority. The equivalent figure for office space was approximately 200,000 sqm, or an office vacancy rate of approximately 20%. This is very similar to the Sheffield Office Stock Study¹¹ in which Knight Frank identify a vacancy rate of 20.25%.

6.14 This suggests vacancy rates for industrial floorspace in Sheffield to be significantly lower than the 'ideal' rate that might be expected under 'normal' market conditions (i.e. around 10% to provide a reasonable

¹¹ Sheffield Office Stock Study, Knight Frank (with the support of Creative Sheffield), 2013

amount of space available for firms to relocate and expand), particularly given the current economic downturn.

6.15 However, the vacancy rate for office floorspace is much higher and well above regional and national rates. Such high rates, even during a period of weak economic growth, could suggest an oversupply of office space relative to demand. This may reduce the need to identify substantial new land allocations for office development in the short term at least.

6.16 The accuracy of the two vacancy rates was tested during consultation with a number of local agents. As noted in Section 5.0, they generally agreed that the B1a vacancy rate was reflective of the proportion of available office space. However, in their view, the figure fails to demonstrate the shortage of fit-for-purpose Grade A office space, which is masked by the widespread availability of poorer quality stock, both in the City Centre and also more secondary locations. This therefore suggests a potential need to consolidate older and less suitable office stock and plan for the provision of additional Grade A office space in suitable locations.

6.17 This is again reflected within the Sheffield Office Stock Study which identifies that the majority of available office space falls within the lower grades of quality (Grades B and C) as follows:

Table 6.2 Vacant Office Space by Grade

Grade	% Total Vacant Office Space
A	30%
B	33%
C	37%

Source: Knight Frank Office Stock Study (2013)

6.18 Agents were generally in agreement with the low vacancy rate for B2/B8 industrial units. Excluding the availability of several very large sites, such as 'Blade' at SIRFT which has been on the market since 2007, Agents considered the vacancy rate for smaller, more in-demand units, to be in the region of 5-6%, and close to the minimum required to allow for opportunities for growth, contraction, new entries into the market and natural 'churn'.

Development Rates

6.19 Information regarding the development of employment land is collected by SCC for annual monitoring purposes. The Business and Industrial Land Survey (BILS) records the amount of business and industrial land developed in Sheffield, generally on schemes that involve floorspace totals in excess of 1,000 square metres gross, since 1989.

6.20

As Table 6.3 illustrates, take up of employment land over the period 1989-2011 totalled **307.0 ha**, comprising 39.3 ha B1 office; 39.1 ha B1c light industry; 150.6 ha B2 general industry; and 75.0 ha B8 warehousing. This equates to an average annual take up of employment land (for employment uses) of 14.0 ha over the 22 year period, or 13.34ha over the past ten years. As might be expected, the last five years has seen a significant decline in the amount of land developed, with annual rates falling to just 5.95 ha.

Table 6.3 Employment Land Completions (ha)

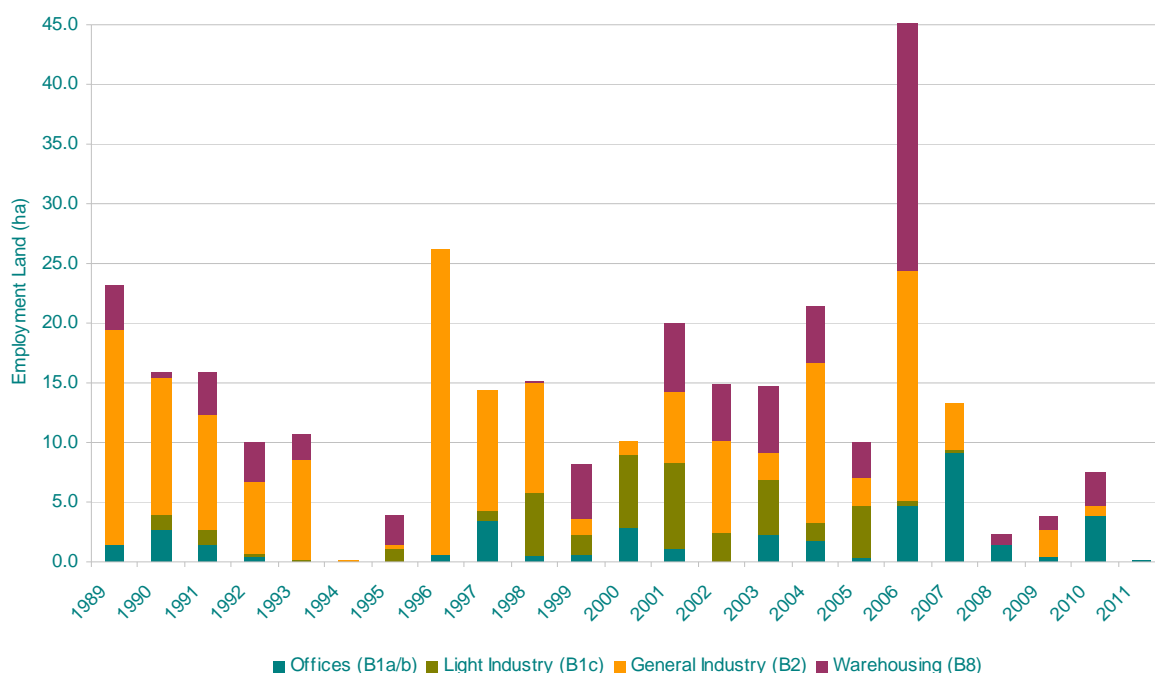
Year	Offices (B1a/b)	Light Industry (B1c)	General Industry (B2)	Warehousing (B8)	TOTAL
1989	1.5	-	17.9	3.7	23.1
1990	2.7	1.3	11.4	0.5	15.9
1991	1.4	1.3	9.6	3.6	15.9
1992	0.4	0.3	6.0	3.3	10
1993	-	0.1	8.5	2.1	10.7
1994	-	-	0.2	-	0.2
1995	-	0.1	0.3	2.4	2.8
1996	0.6	-	25.6	-	26.2
1997	3.4	0.9	10.1	-	14.4
1998	0.6	10.1	9.1	0.1	19.9
1999	0.6	-	1.3	4.5	6.4
2000	2.9	6.1	1.2	-	10.2
2001	1.2	7.1	6.0	5.7	20
2002	-	2.5	7.7	4.6	14.8
2003	2.3	4.5	2.4	5.5	14.7
2004	1.7	1.6	13.4	4.8	21.5
2005	0.3	4.4	2.3	3.0	10
2006	4.7	0.5	10.7	29.3	45.2
2007	9.1	0.4	3.8	-	13.3
2008	1.5	-	-	0.8	2.3
2009	0.4	-	2.3	1.2	3.9
2010	3.9	-	0.8	2.9	7.6
2011	0.1	-	-	-	0.1
TOTAL (ha)	39.3	39.1	150.6	75.0	304
5 yr av	3.0	0.08	1.89	0.98	5.95
10 yr av	2.4	1.39	4.34	5.21	13.34
15 yr av	1.69	1.83	5.59	3.51	12.62

Source: Business and Industrial Land Survey 1989-2011, Sheffield City Council

6.21

As highlighted in Figure 6.2, the development of employment uses has fluctuated significantly over the period 1989 to 2011, with annual figures ranging from a high of 45.2 ha in 2006 to 0.2 ha in 1994 and a low of 0.1 ha in 2011. The development of office floorspace has shown a generally rising trend, compared to declining development rates of industrial and warehouse land.

Figure 6.2 Employment Land Completions by Type



Source: Business and Industrial Land Survey 1989-2011, Sheffield City Council

6.22 Figure 6.2 also illustrates the total amount of employment land broken down by use, and indicates that the rate of development for office, industrial and warehousing schemes has also varied over the period. Overall development rates were strongest for general industrial (B2) uses with a total of 149.8 ha over the period (just over half of all employment land developed). Development of office space was significantly lower, at 35.4 ha over the period.

6.23 Figure 6.2 indicates that the 29.6 ha of land developed for B2 industrial/B8 warehousing in 2006 was uncharacteristically higher than the delivery of such uses either before or since this date. This is attributable to the development of the Sheffield International Rail Freight Terminal (SIRFT) on the former Tinsley Marshalling Sidings which saw the development of two warehouse / industrial buildings with a combined floorspace of 59,750 sqm and a land area of c.17 ha.

Losses of Employment Land

6.24 The BILS also records the amount of business and industrial land developed for non-business/industrial uses. Sites included in the BILS are almost exclusively located in the Business and Industrial Policy Areas. This designation means that business and industrial uses are preferred, but the UDP also lists a range of other uses as acceptable.

6.25 Over the 22-year period for which BILS data is available, 167.4 ha of land within the Business and Industrial Policy Areas has been developed as non-employment uses, representing an average of 35.3% of the total

allocated land as having been developed for non-employment uses, against an average of 70.3% of land developed for B class uses between 1989 and 2011. Over ten years for which we have BILS data (2000-2009), the annual average rate of losses has totalled 8.23ha, of which 4.3ha has been lost to residential uses.

6.26 In the last 5 years, the average proportion of employment land developed for alternative uses was 4.9ha per annum, or around 50% of the total amount of allocated land developed. This appears to show that the amount and proportion of business and industrial land being developed for other uses is on a downward trend. However, this trend is likely to be masked by the overall reduction in construction and build rates since the start of the economic downturn.

Age of Premises

6.27 Although only covering the period up to 2003, ONS data on the age of premises provides a broad indication of the quality of the current stock in Sheffield.

Table 6.4 Age of Employment Premises in Sheffield

Use	Pre-1940	1940-1970	1971-1980	1981-1990	1991-2000	2001+	Unknown Age
Offices	50%	19%	8%	7%	11%	3%	3%
Factories	47%	25%	11%	6%	9%	1%	N/A
Warehouses	38%	24%	14%	11%	7%	3%	2%
All Employment Premises	46%	23%	11%	8%	9%	2%	2%
Regional Average	47%	19%	8%	12%	10%	3%	1%

Source: VOA, 2003

6.28 Table 6.4 shows that the proportion of employment premises built before 1981 (80%) is higher than the regional average for such premises (74%). An analysis of the City's stock by type shows that 83% of Sheffield's factories were developed before 1981, making the stock of B2 premises relatively dated compared to warehousing (76%) and offices (77%).

6.29 However, as referred to above, 47.1 ha of general and light industrial land has been developed since 2003, adding to the stock of modern industrial premises. An additional 24 ha of land has been developed for office uses, and 47.5 ha for warehouse development since 2003, also adding to the stock of modern premises in these categories.

Available Employment Land

6.30 Sheffield's Annual Monitoring Report [AMR] (2010/11) indicates that the City has an estimated five year employment land supply of 127.8 ha.

6.31 Table 6.5 indicates that the five year supply of land for offices is currently 12,846 square metres above the SDF target of 80,000 square metres. The five-year supply of non-office businesses is around two and a half times as much as the SDF target of providing 80,000 sqm of office space, 25 ha for non-office business, and 100 ha for industry and distribution over the next five years. However, the five-year supply of industrial and distribution land is only 51.51ha and therefore currently only meets half the SDF requirement of 100 hectares.

Table 6.5 Five Year Employment Land Supply by Type (as of December 2011)

Employment Land Supply	Offices (B1)	Non-Office Businesses (B1a/b/c)	Industry and Distribution (B2 and B8)
Amount of Land (ha)	10.52	65.77	51.51
Capacity (square metres) (offices only)	92,846	n/a	n/a

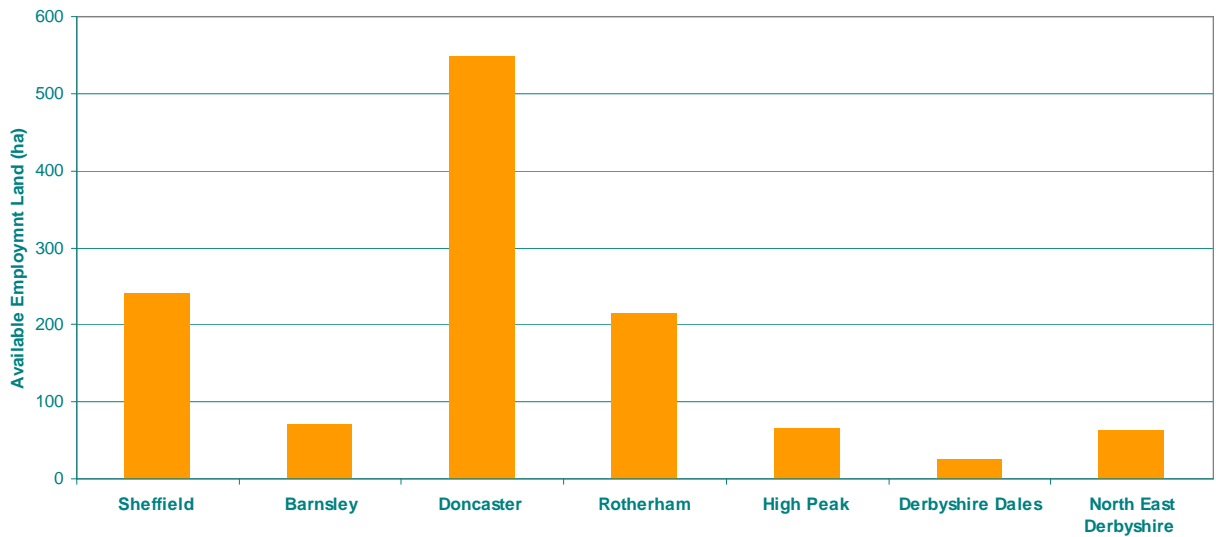
Source: Sheffield Development Framework Development Sites List March 2011

6.32 The gross site area of all 141 existing employment sites provided by SCC provides a total of **around 300 ha (gross) available employment land**. The sites incorporate the remaining allocated employment sites available for development within the adopted Sheffield UDP, alongside those sites proposed for allocation through SDF City Polices and Sites Pre-submission (2013) and sites with planning permission for employment uses.

Employment Space in Adjoining Areas

6.33 It is also important to understand the balance between the supply and demand of employment land in the neighbouring authorities to Sheffield, as well as the extent and types of available employment land and any major new developments which could compete with Sheffield City in future. Figure 6.3, and the accompanying paragraphs below, present the availability of employment land in Sheffield and compare it with that of adjoining local authorities.

Figure 6.3 Employment Land Supply (ha)



Source: Annual Monitoring Reports, Various 2010-2012*

*Note: Generally includes allocated land and extant planning permissions for employment use using latest available AMRs. Sheffield's available land figure taken from SCS data as referred to above.

6.34 Figure 6.3 indicates that Sheffield has a similar level of available employment land to Rotherham, as an adjoining urban authority, but more than double that of employment land availability in Barnsley. Doncaster has more employment land than the other three South Yorkshire authorities put together which could have implications for the supply and demand of employment land provision in Sheffield.

6.35 Sheffield has a considerably higher amount of available employment land compared with High Peak, Derbyshire Dales and North East Derbyshire as would be expected for these more rural authorities.

6.36 Further information in respect of employment land by other South Yorkshire local authorities is summarised below.

Rotherham

6.37 Rotherham and Sheffield have the strongest economic relationships of all the South Yorkshire Authorities, and are acknowledged as effectively functioning as a single economic unit. Indeed, the Sheffield/Rotherham Enterprise Zone straddles across the two authorities. Over 20% of Rotherham's resident working population commute to work in Sheffield (although the number of jobs within Rotherham is increasing). The corridor between Rotherham Town Centre and Sheffield along Templeborough and Meadowbank Road is a significant employment area, with sites such as Sheffield Business Park and the Advanced Manufacturing Park (AMP) either straddling the boundary or contributing to the economy of both authorities.

6.38 The AMP is located in Rotherham and provides two purpose built buildings within which advanced manufacturing companies cluster. Companies currently occupying space at the AMP include Rolls Royce, ITI

Energy, Green Spark Carbon and Wind Power Performance. The AMP is a significant development within Rotherham which falls within the Sheffield City Region Enterprise Zone and has strong links with other companies, universities and research institutions in Sheffield. The AMP directly employs Sheffield residents whilst also contributing to Sheffield's employment through established supply chains. Plans to expand the AMP by circa 37 ha of additional commercial land¹² will therefore have implications for job creation and economic activity within Sheffield itself. The role played by the AMP in creating demand, and potential growth, for advanced manufacturing and associated industries is discussed in further detail below.

- 6.39 Like Sheffield, Rotherham has shown a level of resilience through the economic downturn, with manufacturing and advanced engineering forecast to make an increasing contribution to Rotherham's economy. Rotherham undertook an update of its ELR in November 2010. This identified 188 hectares of allocated development land remaining to be developed, around a third of which is readily available in the short term. Rotherham's Core Strategy identifies the need for 230 hectares of employment land for new economic development. Strategic regeneration areas identified at the AMP will provide 5 ha of land for new office development in the short term, immediately adjacent to the local authority boundary with Sheffield, with a further 32 ha available for future expansion of the park¹³. The RMBC stakeholder interview identified they will require Green Belt land to be released to meet their need.

Barnsley

- 6.40 Barnsley is within the Sheffield City Region and associated Local Enterprise Partnership. Employment land is concentrated in the south and east of the Borough, with a number of established business parks and industrial estates located at Junctions 36 and 37 of the M1. The Barnsley Growth Corridor comprises land to the east of the M1 and incorporates the cities of Wakefield, Doncaster and Rotherham. Like Sheffield, Barnsley has witnessed a major restructuring of its economic base the loss of its traditional industrial base in the 1990s¹⁴. Whilst the economy has since diversified and improved from this low base, Barnsley's economy remains small, with too few jobs and too few businesses for its size, resulting in substantial leakage of workers from Barnsley to other areas, most notably Sheffield. The Barnsley Growth Plan is the key strategy through which these issues are to be tackled, and aims to significantly increase the number of jobs and new businesses in Barnsley to 'rightsized' its economy.

¹² AMP R-evolution gathers pace - Insider Media Limited 1st May 2013

¹³ AMP R-evolution gathers pace - Insider Media Limited 1st May 2013

¹⁴ Barnsley Employment Land Review (April 2010)

- 6.41 The Council published its ELR in April 2010 which concluded that there is insufficient employment land to achieve economic transformation in terms of area, location, character or type. Were it not for the masking effect of the current downturn, such supply issues could soon present real deficiencies in employment land supply before any new allocations became fully effective. The adopted Barnsley Core Strategy requires provision of 350 ha of allocated employment land, to be focused in urban Barnsley (and the Barnsley Growth Corridor); the principal towns; and existing industrial estates and business parks. There are no new strategic allocations proposed within the Core Strategy, although Green Belt land may be considered for employment development to the east of Darfield, taking advantage of existing transport links.
- 6.42 Overall, there is a clear, and significant, imbalance in Barnsley between the need for employment land and the current supply. This has the potential to exert additional pressures on employment sites within Sheffield to meet Barnsley's demand, with high levels of in-commuting from Barnsley likely to remain, and increase, in future years with potential added pressures to the City's infrastructure and services.

Doncaster

- 6.43 Whilst not directly adjoining Sheffield, consideration is given to Doncaster as a district in close proximity which also forms part of the Sheffield City Region. Like the other South Yorkshire authorities, Doncaster's economy is undergoing radical structural change, with the decline of mining and traditional manufacturing. Investment in the town centre, M18 and A1(M) corridor and the opening of Robin Hood commercial airport has helped to diversify the economy, with associated benefits for Sheffield's economy and that of the wider City Region, albeit access to the airport and issues of capacity and congestion on the strategic highways network are particular issues.
- 6.44 As with other authorities, in 2011 Doncaster saw the lowest amount of land developed for employment uses in the past 10 years, with only 0.92 ha gross coming forward. Furthermore, the remaining supply of employment land is extremely high, at 547ha. This figure has risen considerably in recent years because of the granting of outline planning permission for the proposed Strategic Rail Freight Interchange (Inland Port) together with ancillary infrastructure including road improvements - the Finingley and Rossington Regeneration Route Scheme (FARRS) – and a road/rail served inter-modal freight terminal with distribution units rail linkages on a 197ha Green belt site at Rossington. Other notable employment schemes include the commencement of construction at Hatfield Power Park, including a Carbon Capture coal power station and Doncaster's Energy from Waste unit; outline planning permission for a 50 ha 'Employment Park' at Armthorpe; and the development of new civic offices in the town centre. 27 ha of land is also designated for air related use adjacent to Robin Hood Airport. Overall, Doncaster has a

limited amount of high quality office and advanced manufacturing sites, but a vast future supply of large scale distribution uses and logistics terminals which, once developed, will complement, rather than compete, with Sheffield's employment land portfolio which focuses on the office market and advanced manufacturing but has limited capacity to increase its supply of distribution units.

Conclusions

6.45

The key messages to arise from this section can be summarised as follows:

- Sheffield has significantly more employment floorspace than the other South Yorkshire authorities, and almost four times the amount of B1 office space, highlighting the prominence of Sheffield within the City Region and the significance of its office market;
- Sheffield has a higher supply of office space per capita but a moderate supply of industrial floorspace per capita compared with higher levels in Rotherham, Doncaster and Barnsley;
- Sheffield has experienced a decline in the amount of industrial floorspace, but an increase in the amount of office floorspace in recent years, resulting in a small reduction of employment floorspace overall (equating to less than 1% of its total stock). This is in contrast to other South Yorkshire authorities which have all seen an overall increase in employment floorspace;
- Over the period 1989 to 2011, take up of employment land (for employment uses) has achieved an average of 14.0 ha per annum. This has since reduced to an average annual employment land take up rate of 5.95 ha since the onset of the 2007/08 recession;
- The City has lost a total of 167.4 ha of land allocated within the Business and Industrial Policy Areas to non-employment uses, representing an average of 35.3% of the total allocated land;
- Sheffield has around 300 ha of employment land that is considered to be 'available', of which around 114 ha has planning permission for employment (and other) uses. 217 ha is identified as emerging employment allocations within the draft City Sites DPD. The City has a pipeline supply of 46.44 ha of land with planning permission for B2 and B8 uses, and 173,157sqm approved B1a office floorspace;
- Sheffield has a similar level of available employment land to Rotherham, but more than double that of Barnsley. Doncaster has a considerably higher employment land supply, likely to be attributable to planning permission granted for a new Inland Port and associated distribution units on 197ha of land at Rossington. Hence the nature of the employment land available to Doncaster and Sheffield remains very different and is, potentially, complementary.

7.0

Economic Potential and Growth Sectors

7.1

This section assesses the future economic growth potential of Sheffield and seeks to identify those industrial sectors most likely to drive forward this growth. The analysis draws upon the findings of the preceding sections.

Future Potential

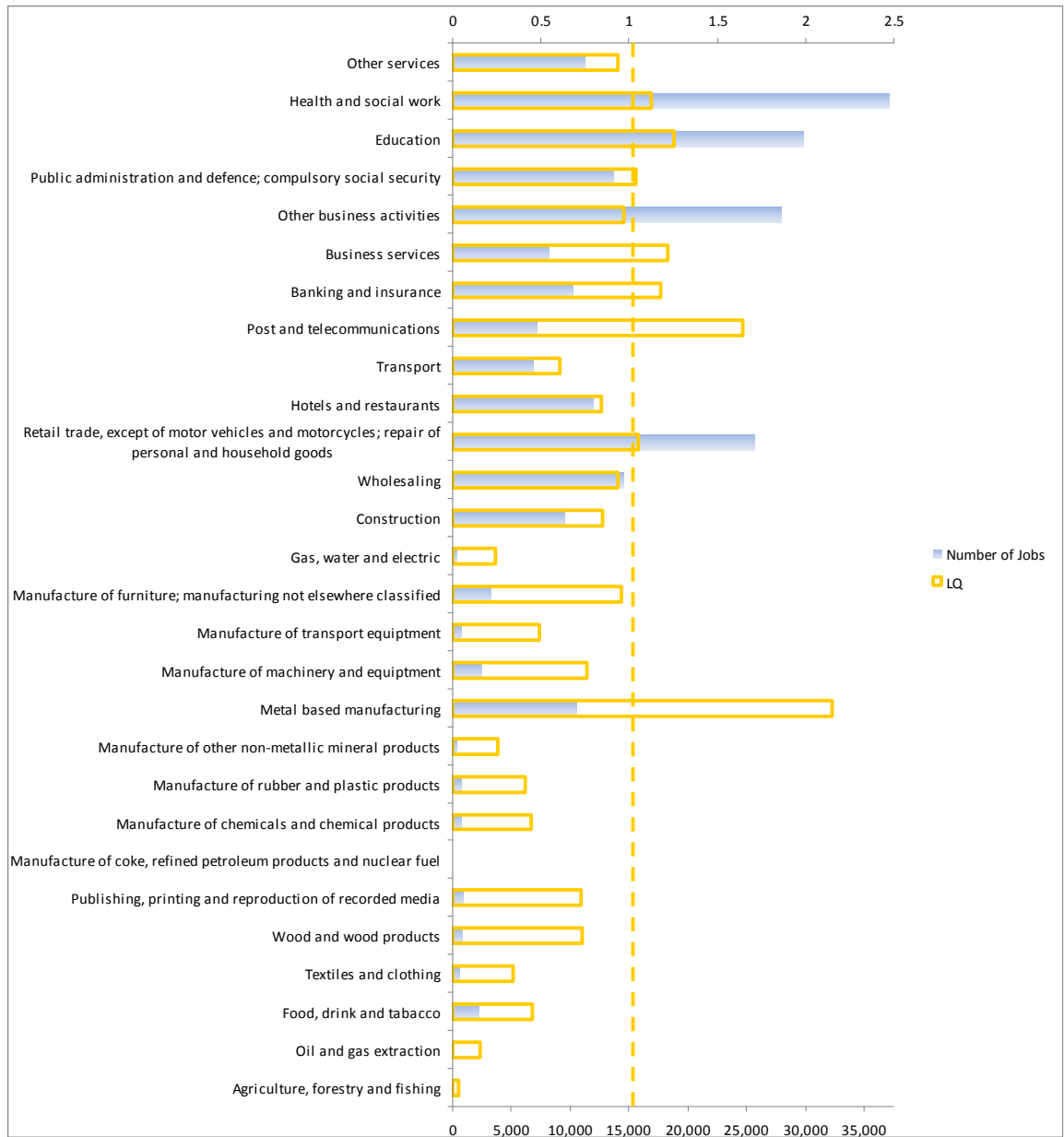
7.2

To understand which industrial sectors are likely to be most important to Sheffield's future growth aspirations, it is important to consider which sectors are currently under or over-represented within the local economy and to examine recent levels of growth. Figure 7.1 assesses the City's current sectoral strengths through the use of location quotients, which measure the concentration of employment in an industry at the Local Authority level relative to the regional average. Those sectors which exceed beyond the central dashed line denote a greater-than-average representation of employment relative to Yorkshire and The Humber region, whilst those before it denote a lower representation. The further the bar is from a value of 1.0, the greater the extent of the 'over' or 'under'-representation.

7.3

Figure 7.1 clearly illustrates that the substantial over-representation of metal based manufacturing remains in the City. However, Sheffield also features a high proportion of jobs in banking & insurance and other financial/business services, as well as communications, indicating that Sheffield has to some extent made steps towards a more service-orientated economy. Whilst the sectors of health and social work; education; other business activities; and the retail trade are represented by a high number of jobs, these sectors are generally in line with regional averages. Sheffield is, however, under-represented regarding the proportion of jobs in transport; hotels and restaurants; media; construction; utilities and other (non-metal based) manufacturing.

Figure 7.1 Location Quotients of Economic Sectors in Sheffield



Source: NLP analysis, Based upon BRES data (2011)

7.4

The relative representation of Sheffield’s key employment sectors has also been cross-referenced with recent growth of that sector in the City, compared to recent growth at the regional level. This is summarised in Figure 7.2 which shows the representation of sectors in the City as well as levels of employment change over the period 2000 to 2011. It is important also to understand the direction of employment change. Within the chart, those sectors where employment growth in Sheffield has over-performed the average for Yorkshire and the Humber are highlighted in green, whilst those shown in red have under-performed relative to regional growth.

- 7.5 The top-right quadrant of the table is of most importance in suggesting those sectors likely to drive future economic growth. It contains those sectors which have a high representation and have experienced positive growth. Within this quadrant, those sectors shown in green are particularly relevant, as they have experienced levels of growth above the Yorkshire and Humber average. These sectors might be expected to enjoy continued strong growth within the City, notwithstanding the current economic climate. For Sheffield, this quadrant includes education; health and social work; and business services. The wholesaling sector has also experienced growth above the regional average, although this sector is under-represented in Sheffield in comparison to regional averages.
- 7.6 Transport, other business activities, public administration and banking & insurance have all demonstrated growth since 2000, but at levels below regional growth levels for these sectors.
- 7.7 The bottom-left quadrant of the table highlights that whilst employment in hotels and restaurants, construction and (non-metal) manufacturing account for large numbers in absolute employment, these sectors are under-represented relative to the regional average. In addition, these sectors have contracted since 2000, with employment growth below the levels observed regionally.

Figure 7.2 Location Quotient by Sector (Sheffield)

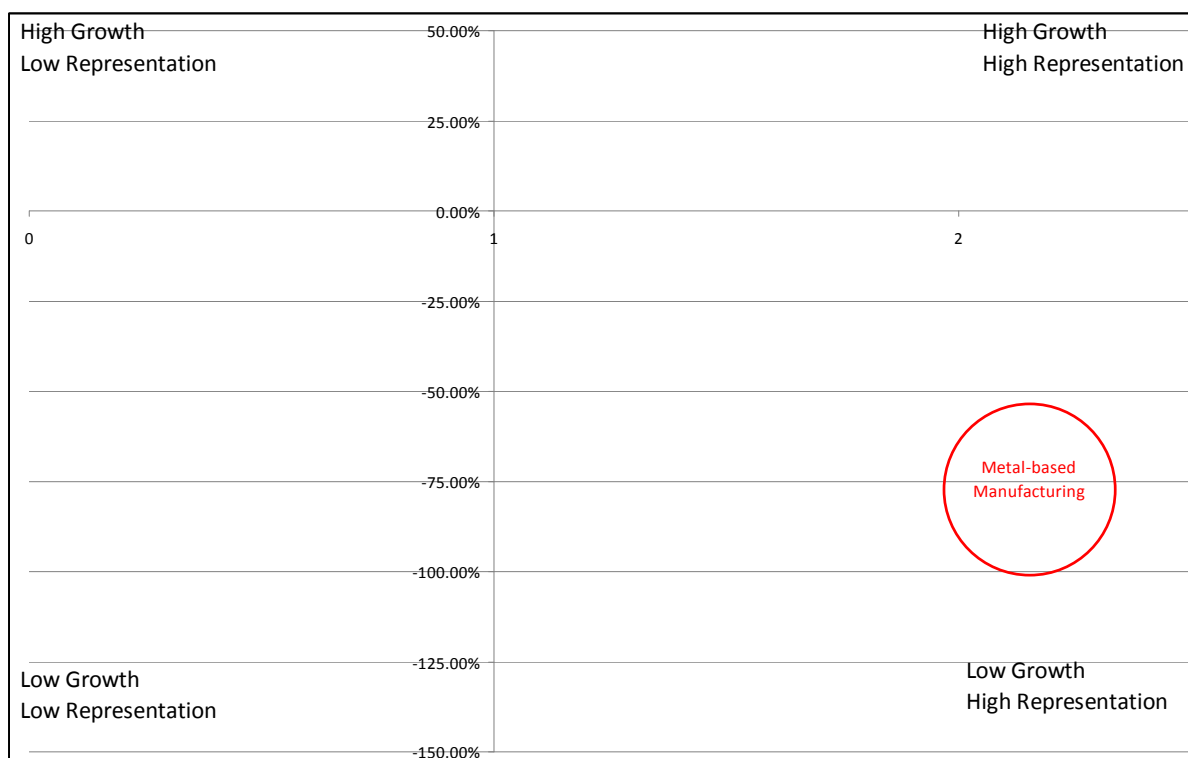


Source: ABI / NLP Analysis

7.8

Significantly, trends associated with metal based manufacturing are literally off the scale and have to be represented separately, on Figure 7.3. Read alongside Figure 7.2, this demonstrates the significant reduction in employment in metal based manufacturing which has experienced substantial employment losses despite having a very high representation still.

Figure 7.3 Location Quotient for Metal Based Manufacturing (Sheffield)



Source: ABI / NLP Analysis

7.9

In broad terms, this suggests that if the future growth of the City is to be at all comparable with that of the recent past, Sheffield is likely to be driven by continued growth in the health and education sectors, as well as jobs in business services and, to a lesser extent, jobs in the retail trade.

7.10

Reference to Experian baseline job forecasts indicates that over the period 2013 to 2031:

- Employment in Professional Services (including finance) will increase by 6,060 within Sheffield;
- An additional 4,580 jobs in Administration and Support Services, will be created in Sheffield, and a further 800 in computing and information services;
- An additional 3,110 jobs will be required in land transport, storage and post in Sheffield;

- Employment in Education and Health and Social Care is predicted to increase by 4,380 and 6,010 in Sheffield respectively;
- Accommodation and food services will employ a further 2,420 people in Sheffield by 2031.

7.11 Clearly, there are limitations to predicting future growth based upon past performance, particularly given the uncertainty generated by current economic conditions, as well as policy commitments and newly emerging trends. These forecasts do not take into account the job growth implications of new or planned developments at local authority level, or policies which prioritise certain types of employment development.

7.12 In particular, Sheffield has an established reputation and considerable track record in advanced manufacturing and engineering and there remains a strong commitment in Sheffield and the wider City Region to support the growth of these industries. The following five high value priority growth sectors have been identified, and their importance to future economic performance acknowledged in a range of policy documents and strategies, including the Sheffield City Regional Economic Overview and the Economic Growth Strategy for Sheffield:

- 1 Advanced manufacturing and materials (AMM);
- 2 Business, professional and financial services (BPFS);
- 3 Creative and digital industries (CDI);
- 4 Energy, environmental and low carbon industries (EELC); and,
- 5 Healthcare technologies (HTech).

7.13 These sectors are considered to have the best prospects of achieving rapid and sustainable growth in revenue and jobs, with a higher rate of projected job growth expected across these sectors as a result.

Sectors with Growth Potential

7.14 Building upon this initial analysis and taking account of the locational requirements of a range of key industrial sectors, it is possible to form a view as to how likely Sheffield is to develop or attract growth in these and other key sectors over the study period. The analysis draws upon the findings of research which examines the key drivers of business location by sector¹⁵ as well as research by underpinning Sheffield's economic and growth strategies, stakeholder consultation and the findings of previous chapters.

¹⁵ Spatial Requirements of Key Sectors in the South East, SEEDA (2004) and Demand for Employment Land in Greater Manchester (NLP, August 2009)

Financial / Business Services

- 7.15 Business location decisions in the Financial and Business sector reflect factors such as access to markets/suppliers; a skilled and diverse workforce; and high quality transport and telecommunications infrastructure. Quality of life factors, including good housing and cultural facilities are also important.
- 7.16 Within Sheffield, the universities play a key role in ensuring that businesses have access to a skilled pool of workers, and in particular students with strong business and language skills. Sheffield is the least congested City in the UK, and the number one City outside London in terms of transport provision¹⁶, with the City's well developed transport network acting as an important factors for businesses choosing to locate within the City. The City has direct rail links to London which are set to be improved via electrification of the Midland Mainline route and, ultimately, provision of HS2. Sheffield's relatively low cost base in terms of salaries and occupancy costs is a further key contributing factor to companies choosing to locate within the City, as well as offering a high quality of life.
- 7.17 Sheffield is an established UK centre for business, professional and financial services, with blue chip companies such as HSBC, Santander, Aviva, HBOS, RBS and Nationwide all occupying premises in the City. These firms provide shared service centres, contact centres and business process outsourcing across a range of specialisms including finance; life and pensions administration; customer services; and IT development and service support. There is also a strong legal sector within the city.
- 7.18 The majority of businesses in this sector are located, or would seek to be located, within the City Centre, or purpose built business and office parks at Meadowhall and other out of centre locations. The high value nature of the sector means that businesses can afford to seek premises in such locations and thereby capitalise upon the profile and accessibility benefits that they offer. Out of centre locations will be attractive for firms seeking lower rents and the availability of free car parking.
- 7.19 At present, the long term impact of the current economic downturn upon the growth prospects of the sector is still unclear. Past experience is that downturns in these sectors see financial institutions and business services firms retrenching from growth areas to their core locations ('safe havens') – a trend that in global financial sectors terms might reinforce traditional locations such as London, as compared to Sheffield. However, against this, Sheffield still comprises an established business services location for the North of England, and a location which has seen growth in Business Services at levels above the Yorkshire and Humber

¹⁶ GVA Grimley, Transport Friendly Towns, 2009

average, as well as growth in Banking and Insurance and Other Business Activities (albeit at lower levels than experienced elsewhere in the region).

7.20 Sheffield will compete with larger Northern cities including Leeds and Manchester for firms in the financial and business service sector, and so the presence of a choice of Grade A office space in both central and business park locations will be important in allowing Sheffield to compete. Sheffield is looking to enhance provision of Grade A office space in a new Central Business District, the Riverside Business District, and key sites around Sheffield Railway Station. The future development of HS2 could also encourage further business park development at Meadowhall as an appropriate location with high speed links to other commercial centres, particularly London.

7.21 In the medium to long term, NLP concludes that the locational advantages of Sheffield for established financial and business services will, with continued effort and investment, continue to enjoy significant growth over the Plan period even if the short term shows a slowdown. Such growth should be aided by policy objectives to increase Grade A office space in the City, as well as the commitment by the City Region - and in particular Creative Sheffield - to raising Sheffield's profile and further encouraging inward investment which, if achieved, could lead to strong growth in this sector in the long term.

Distribution

7.22 Key locational factors for distribution and logistics activities are the availability of low cost warehousing, storage and distribution sites, whilst access to the strategic road network is critical. The sector is under-represented in Sheffield with jobs in Wholesaling and Transportation accounting for a lower proportion of employment than elsewhere in the region (albeit the Wholesaling sector has experienced growth above the regional average since 2000). The transport industry has experienced some growth but at levels below the regional average.

7.23 Despite below average jobs in the sector, distribution and logistics still account for in excess of 20,000 jobs in Sheffield. At present, much of Sheffield's distribution and logistics activity is within the Lower Don Valley, as well as the Sheaf Valley and along the M1 corridor. Policy priorities are seeking to relocate distribution activities from less suitable areas in and around the City Centre to the Lower and Upper Don Valleys.

7.24 Sheffield International Rail Freight Terminal (SIRFT) currently provides 60,108 sqm of available warehouse space across two high bay distribution units. The units provide strategic access to junctions 33 and 34 of the M1, as well as dedicated rail sidings. Planning permission was in place for the next phase of development (SIRFT 3) to a maximum of 26,291 sqm, however this has now been lost to the PFI Highways project as Amey's aggregates depot (PP12/02771/FUL) Nevertheless

the existence of SIRFT, generates opportunities for yet future growth of the distribution sector and allows the City to compete with other destinations for major end-users with requirements for rail freight facilities. Approximately 38,000 sqm of industrial/warehouse space is available within a single unit at Junction 34 of the M1.

- 7.25 Consultation with local industrial agents revealed a growing market for large scale industrial units, with the City's excellent road links, low levels of congestion, relatively low occupancy costs and the availability of skilled local labour acting as key attracting factors. The availability of incentives associated with the Sheffield City Region Enterprise Zone may further encourage take up and stimulate growth in this sector. Longer term development of HS2 passenger rail routes is likely to create additional capacity for freight on existing railways.
- 7.26 Notwithstanding the above and the presence of two very large vacant units within the City, feedback from local agents also revealed that existing warehouse units in Sheffield are not considered to be in the best location for end users, and would be better located on the M1 corridor with access to the strategic road network.
- 7.27 The development of large scale industrial units requires large, flat sites with good strategic access and minimal clean up or infrastructure costs since the sector is highly cost sensitive. Such sites are not currently present within Sheffield on account of the local topography and the presence of substantial areas of un-remediated brownfield land as preferred locations for development. It is therefore likely to prove difficult to provide locations for further large scale strategic sites which are able to compete with locations elsewhere along the M1 (such as Markham Vale) where such sites are more readily available and where similar economic incentives are also in place.
- 7.28 Further competition in terms of rail freight associated distribution space could also result from the development of the new Inland Port at Rossington in Doncaster, although associated improvements to the Finingley and Rossington Regeneration Route Scheme (FARRS) will also improve access and journey times between Sheffield and Robin Hood Airport with potential benefits for this, and other, employment sectors.
- 7.29 Overall, there appears to be scope for moderate growth in the distribution sector taking into account increasing levels of demand and Sheffield's locational advantages and good transport network, although future growth will be partly dependent upon the availability of large, low cost sites with good accessibility coming forward for development and the impact of alternative, competing schemes.

General Manufacturing

- 7.30 The economies of Sheffield and the wider sub-region have traditionally been underpinned by a very strong manufacturing sector, famously metal-

based manufacturing and the production of steel. As indicated in Figure 7.1, all non-metal based manufacturing sub-sectors are significantly under-represented in Sheffield. This is of course counter-balanced by a substantial over-representation of employment in metal-based manufacturing. This is despite Sheffield experiencing a significant reduction in employment in this sub-sector over many years (Figure 7.3).

- 7.31 Sheffield retains key strengths in the manufacture of metals and metal products, and the City itself provides an important and well-recognised brand for the global markets which it serves. Significantly, whilst competition for general manufacturing from lower cost locations abroad continues to increase, Creative Sheffield outlined that Sheffield is able to compete with this market and is attracting metal manufacturing business on the basis of its global reputation (Made in Sheffield), existing highly skilled workforce and the higher quality product it is able to produce. Local agents identify a retained, and growing, demand in metal manufacturing and associated floorspace requirements as a result of this.
- 7.32 There are a number of established industrial areas in Sheffield, notably the Upper Don Valley, which will continue to accommodate metal-based manufacturing businesses. The sector is relatively cost sensitive and therefore access to a good supply of affordable sites and premises will remain important. Other key locational factors for the sector include good transport accessibility and an appropriately skilled labour force, all of which are present in Sheffield.
- 7.33 Road and rail accessibility is also important to firms, as it impacts upon the efficiency with which they can transport raw materials and end products, and is likely to be increasingly important in future years as the price of fuel continues to rise. Locations and units with strategic road and rail links, such as SIRFT and SIRFT 3, may therefore become increasingly attractive to general manufacturing businesses in the future.
- 7.34 The growth potential of general manufacturing is considered to be low-to-moderate, taking account of the City's continued shift towards a higher value and more service oriented economy (and the low representation and growth in non-metal based manufacturing), whilst at the same time reflecting the fact that the market for metal-based manufacturing floorspace remains, competing with foreign markets for the production of quality metal products.

Advanced Manufacturing / Engineering

- 7.35 This sector typically includes higher value manufacturing and engineering uses relying on greater technology and skill inputs. Important factors identified for this sector are the proximity to the strategic road network, availability of high quality business park environments and flexible/affordable workspace. However, the most important factor is the supply of skilled, qualified and experienced staff and this is identified as

being the most significant challenge facing businesses in these sectors today. Indeed, NLP's experience of previous ELRs undertaken in the North of England have found that many businesses in the sector tend to remain broadly in their historical location in order to retain their workforce.

- 7.36 Borne out of innovation associated with its traditional heritage in the steel industry, Sheffield has developed an established track record for advanced manufacturing and engineering, and is recognised worldwide for its expertise in high precision engineered and manufactured products which form part of the global supply chain for industries such as Aerospace, Defence, Power Generation, Automotive and the Medical industry in which Sheffield has a distinct strength and competitive advantage.
- 7.37 As a result, employment in advanced manufacturing and engineering is significantly overrepresented in Sheffield compared with regional averages - high and medium-high technology firms make up around 20% of all firms within Sheffield. The Sheffield/Rotherham area is host to many world-leading manufacturing and engineering companies including AESSeal, Firth Rixson, JRI Orthopaedics, Rolls Royce, Siemens, Boeing and Tata Steel.
- 7.38 The presence of two universities in Sheffield and a number of other established higher educational institutions and R&D facilities, is key to attracting advanced manufacturing and engineering firms, alongside the critical mass of firms already present in the city and their established track record. This will help to feed further growth in this sector. Indeed, a recent article in *The Economist*¹⁷ highlighted Sheffield as providing a 'hub' of highly specialised engineering skills and therefore the best location for the establishment of new metallurgy processes which could involve the highly innovative (and cheap) production of titanium as an indication of the likely direction of future trends.
- 7.39 Advanced manufacturing and materials (AMM) forms a key sector in Sheffield's Economic Strategy and a policy priority for future development with higher projected job growth anticipated in this sector as a result.
- 7.40 The City Region benefits from the Advanced Manufacturing Park (AMP) which provides a dedicated advanced manufacturing technology park where established industries cluster, with established links to the City's universities and research centres. As referred to above, since many businesses in the sector tend to remain broadly in their historical location in order to retain their workforce, it is therefore likely that the AMP will remain a key focus of future advanced manufacturing activity, particularly for the expansion of established businesses. This corresponds to recently announced expansion plans at the AMP which

¹⁷ *Manufacturing Metals: A tantalising prospect* - The Economist February 16th 2013

revealed the release of the next phase of development across 5 ha of the site following the success of the Evolution of the Amp units, all of which are now fully let. Discussions are also underway regarding the potential development of larger premises on the additional 32ha of land available across the wider site¹⁸.

- 7.41 Overall, therefore, the growth potential of advanced manufacturing and engineering sectors in Sheffield is considered to be strong, considering the existing prevalence of knowledge based industries; the presence of universities and higher education institutions; the City's established reputation and existing skills base; and policies which prioritise the increased growth of this sector.

Information & Communications Technology (ICT)

- 7.42 Information and Communications Technology [ICT] includes such business activities as computing, hi-tech telecommunications (including the internet), software design, digital storage and audio-visual systems. Important locational factors for this sector include high quality ICT infrastructure, the availability of a skilled workforce, as well as proximity to a major metropolitan centre and the market opportunities that this provides. ICT industries often cluster together in order to benefit from broadband connectivity and facilitate recruitment.
- 7.43 Sheffield performs relatively well against these criteria, providing an established business location with a large pool of skilled workers and an increasingly established business infrastructure, as well as direct (and potentially improving) rail links to London. As a result Sheffield is already host to a number of ICT businesses, including Virgin Media, BT, the internet provider Plusnet, and hosts the global IT shared service centre of HSBC which is the largest private sector employer in the City.
- 7.44 Sheffield Digital Campus currently provides office accommodation, designed and built specifically for companies in the digital sector. Located in City Centre between Ponds Forge, the Sheffield city bus station and the city's mainline rail station. There is future scope for the other phases to come forward. The existence of the Digital Campus, and its potential expansion, generates opportunities for future growth of the digital sector and allows the City to compete with others.
- 7.45 Although trends suggest that ICT firms tend to grow organically, and are therefore difficult to plan for. Having said that, favoured sites for this sector are those which provide an urban location with access to high quality ICT infrastructure and a skilled workforce. Business park locations are often favoured, as well as established locations for similar ICT activities.

¹⁸ AMP R-evolution gathers pace - Insider Media Limited 1st May 2013

- 7.46 Sheffield's Economic Strategy highlights a commitment to increase the provision of both high speed broadband and wireless within Sheffield in the forthcoming years, as well as providing a new data storage centre which may aid further future growth in the sector
- 7.47 Overall this sector has the potential to deliver moderate to strong growth, with the expansion of established firms and the encouragement of new start-ups, including provision for a digital storage centre, could facilitate strong growth in the longer term. The potential rate of growth will be dependent to an extent on the improved delivery of broadband and wireless services, as well as the success of Sheffield in expanding its business services sector, as this sector is a key driver of demand for ICT services.

Environmental Technologies / Energy

- 7.48 This sector includes activities such as the production of electricity, gas and steam, renewable energy technologies, recycling, water treatment, decontamination and other environmental consultancy. Key considerations with respect to location decisions for the sector include the availability of skilled labour resources, proximity to universities with relevant Research and Development facilities, access to customers/suppliers and available incubator/move-on facilities.
- 7.49 Sheffield has a number of strong advantages in this industry, not least the City's two universities and a number of dedicated research centres including the Sheffield Siemens Wind Power Research Centre, Sheffield University Waste Incineration Centre and the Nuclear Advanced Manufacturing Research Centre (located in Rotherham at the AMP). There are also a number of established firms in renewable energy generation located in Sheffield such as ITI Energy, Pulse Tidal and Chesterfield BioGas.
- 7.50 Whilst employment in the Utilities sector is strongly underrepresented within Sheffield at present, with significantly lower levels of employment in this sector than elsewhere in the region, the nature of the Environmental Technologies industry is more complex than employment in the traditional utilities sector, and there are a number of companies delivering high-performance engineered products including Offshore Wind, Renewables, Carbon Capture and Storage (CCS) and nuclear power which are located in the Sheffield region as a consequence of its established engineering and advanced manufacturing base.
- 7.51 Energy, environmental and low carbon industries (EELC) are among the five key growth sectors identified in Sheffield's Economic Strategy, and form a policy priority for future development, with relatively higher levels of growth expected in this sector as a result. Waste processing is already a prominent industry within the Upper Don Valley and the site at Beeleywood offering 45 acre sustainable land for potential Green industrial uses and in the Lower Don Valley the E-On biomass plant at

Blackburn Meadows is currently under construction, completion expected mid 2014. Such industries are likely to become increasingly important in future years as a result of rising energy prices and the increasing awareness of (and response to) climate change.

- 7.52 Demand from this sector is likely to be particularly high within the established AMP in Rotherham and the Lower Don Valley which provides an existing hub for renewable energy products and access to research and development networks, as well as strategic transport links.
- 7.53 Overall it is considered that the sector offers moderate-strong growth potential as a result of its skilled population, the proximity of local universities and existing businesses and research centres in the context of policy prioritisation and the national requirement for advances in energy efficiency and renewable resources in future years.

Healthcare / Biotechnology

- 7.54 The primary locational driver for the healthcare and biotechnology sector is access to relevant research and development activities, with many business start-ups requiring close university links. Access to a pool of suitable graduate labour and proximity to existing bioscience clusters can also be important to businesses, whilst large, lower-cost sites are often sought for production facilities. Locations with good access to major metropolitan centres are often viewed as preferable.
- 7.55 Sheffield has a number of advantages with respect to the healthcare and biotechnology sectors. The City's universities and the Sheffield Teaching Hospital Trust represent a significant asset, providing access to relevant research expertise and a pool of graduate labour. In addition, established precision engineering expertise and firms, many of whom work in the healthcare and biotechnology sector (e.g. B Braun Medical Limited; JRI Orthopaedics; Symmetry Medical and Swann Morton) are located in the City and provide existing expertise and associated supply chains.
- 7.56 Strengths in the healthcare and biotechnology sector are further enhanced by Sheffield's established AMM base, with many firms in this sector locating in and around the AMP and Lower Don Valley in order to capitalise on strong connections to AMM firms, as well as the Sheffield teaching hospital and other research institutions.
- 7.57 Healthcare technologies (HTech) are also among the five sectors identified in Sheffield's Economic Strategy, and form a policy priority for future development. This sector is therefore considered capable of delivering moderate to strong growth in future years.

Creative Industries / Media

- 7.58 This diverse sector includes activities such as publishing, graphics, software and web-design. Key locational factors sought by businesses in the sector include access to broadband and areas with an attractive lifestyle and high quality of life. Access to London's large client base is also beneficial. The availability of skilled staff and affordable town centre premises with a good cultural image can also be important. A high proportion of freelance contractors typically work from home or within small offices.
- 7.59 Creative Sheffield highlight that Sheffield's Creative and Digital Industries (CDI) employ over 10,000 people and claim that significant growth in the industry in recent years has led to Sheffield becoming one of the leading centres of digital specialism in the country. Two interdependent markets have developed: a digitally focussed market, incorporating software and interactive media and IT services; and a more creatively focussed market including design, arts and publishing.
- 7.60 Sheffield therefore has a developing cluster of creative and digital companies, with the majority comprising home grown businesses and small scale companies, alongside some inward investment by international market leaders. Sheffield hosts a number of Global IT industry operators (including Plusnet broadband and one of HSBC's global IT centres as referred to above), as well as interactive media services and conferencing; E-learning (including Learndirect); and other online information services.
- 7.61 The newly established Digital Media Centre in Sheffield City Centre is host to the creative sector within Sheffield, and has some scope to accommodate further companies in the creative industries sector in the short term. The sector should be further aided by the focusing of additional digital, creative and knowledge based industries at Sheaf Valley an area of the City Centre, as well as the improved broadband and wireless capabilities referred to above. There is also a commitment by the City Region to support a technology start up programme and offer assistance to the CDI sector, as well as providing private sector collaboration on creative and digital industries as part of the CloudCity initiative to further support data centre development.
- 7.62 Creative and Digital Industries are among the five sectors identified in Sheffield's Economic Strategy as forming a priority for future growth. The Core Strategy recognises the importance of this key growth clusters for the economy of the City Region, and requires consolidation and strengthening of the cultural industries within the City Centre by establishing a Cultural Industry Quarter. Providing an area with a wide mix of uses as the main location for the city's creative and digital industries, under policy CS17.

- 7.63 Overall this sector is expected to deliver moderate growth given the current dominance of smaller, 'home grown' companies, albeit concentrations of activity in this sector could provide opportunities to generate indigenous growth through the development of spin-out businesses and lead to stronger growth in the long term, particularly if the various initiatives proposed by the City Region prove successful.

Construction

- 7.64 The majority of employment in the sector is 'on-site' and as a result generates little requirement for commercial premises. It does, however, create a requirement for storage depots and wholesale premises supplying construction products and materials. Such uses are particularly cost sensitive and therefore tend to locate in areas with low values. As a result, any demand in Sheffield is likely to be in well established, low grade industrial locations of which there are currently an abundance within Sheffield.
- 7.65 The construction sector is currently underrepresented in Sheffield relative to the regional average, and has demonstrated a significant reduction in total jobs as the construction sector has been affected significantly by the current recession.
- 7.66 Overall, employment growth in construction is likely to be limited, although there may be some scope to consolidate and recoup job losses created by the current recession once stalled development projects begin to gather momentum and new projects become more viable in the longer term.

Growth Opportunities of Other Relevant Non-B Class Employment Uses

Public Administration and Defence

- 7.67 This sector includes local and central government activities, along with social services, job centres, the police, courts, defence, fire and other emergency services. Although some of this activity occurs within buildings classified as use class B1a, only a very small proportion actually occurs in commercially-available offices. It is only this generally-available and non-purpose built space which matters for estimating B-class future requirements and as a result the remainder (and vast majority) is considered here under non-B class uses.
- 7.68 With approximately 13,630 workers (5.6% of the City's total jobs in the 2011 BRES statistics), this sector is strongly represented in Sheffield in absolute job terms, and is generally in line, although slightly higher, than regional averages. This sector experienced strong job growth at 34.8% over the period 1998-2008, although a 7% decline since 2011. Experian

job forecasts predict a reduction in overall jobs of just under 10% by 2031.

- 7.69 Given planned Government public sector expenditure cuts, it appears unlikely that there will be any significant job growth in this sector in the short/medium term, and probably some decline as forecast in the latest Experian Baseline forecasts. Overall, no job growth can be robustly justified for this sector and hence no requirement for additional land to accommodate it, with the potential for some site and premises releases resulting from budget cuts and service rationalisation.

Health Care

- 7.70 The potential for growth in the health and bioscience sector is discussed in detail above. Regarding growth in the (non-manufacturing) health and social care sectors, this sector accounts for the highest proportion of employment in the City at 15.2%, or 37,020 jobs (BRES 2011). Whilst representation in healthcare is generally in line with regional averages, employment in this sector has increased above the Yorkshire and Humber average in recent years which suggests that it is likely to remain an important sector likely to drive future economic growth. Experian job forecasts reflect this by projecting a 3.8% increase in jobs in healthcare by 2031.
- 7.71 Locational drivers for the healthcare sector include the availability of large, lower-cost sites, as well as links with existing healthcare networks. Locations with good access to major metropolitan centres are often viewed as preferable.
- 7.72 A new Critical Care Unit at Sheffield's Northern General Hospital opened in March 2009. The unit represents the largest of its kind in Europe and is likely to have contributed to, or at the very least reflects, the strong job growth experienced in Sheffield within the healthcare sector. The unit was funded through the Foundation Trust Financing Facility (FTFF) which offers low rate loans to NHS trusts and is expected to provide more financial flexibility and use of private sector funding for new healthcare developments in the future.
- 7.73 Overall, the high representation and levels of growth suggests that health and social care will remain a strong growth area in Sheffield in terms of employment going forward in this sector, with the ability to mobilise new funding sources suggesting that job creation in healthcare may avoid implications associated with the withdrawal of funding affecting other public sector services. Nevertheless, the increase in healthcare jobs is likely to focus on existing healthcare locations and facilities and will have a very limited B-class component.

Residential Care

- 7.74 It has been acknowledged for a number of years that the current supply and form of housing nationally does not adequately meet the needs of a rapidly ageing society. It has been estimated that more than 3 million people over the age of 65 receive public funded services such as home care, home improvement and/or housing related support services, and community alarm/telecare services to help them live well in the home¹⁹. This issue is becoming more and more pressing over time due to Britain's ageing population, with substantial gains in life expectancy above the age of 65.
- 7.75 According to the latest ONS 2011-based SNPP, the number of people over the age of 65 in Sheffield will only grow by 12.2% (+9,988 residents) between 2012 and 2021, compared to the predicted regional growth rate of 21.0%. Furthermore, the proportion of 'very elderly' people in Sheffield (i.e. over 85 years) is anticipated to increase by 25.5% from current levels by 2035 (+2,570 elderly residents), compared to a regional increase of 35.8%. Taking a longer term view (with reference to the ONS 2010-based SNPP), the proportion of residents in Sheffield aged 65 and over is expected to increase by 37.0% over the period 2012-2035, compared to a higher regional average 50.9% over the same period.
- 7.76 These improvements in life expectancy are not being matched by commensurate gains in disability-free longevity, leading to a greater absolute number of older people who may need care.
- 7.77 Despite lower levels of growth in the elderly population than the regional average, there will likely remain a need for additional care homes and extra care facilities in Sheffield over the coming years, albeit there will be a very limited B-class component to this growth.

Retail

- 7.78 Retail growth is related to population change and spending, as well as competing provision. Retailing is a significant employer in Sheffield (26,560 employees as of 2011) and is generally in line with the amount that would be expected, based on regional averages. Employment in retailing in Sheffield did, however, fall by 2% from 2001-2008, although the Experian growth forecasts suggest that employment in retail will increase slightly, to employ 27,280 people by 2031.
- 7.79 Retailing is concentrated in Sheffield City Centre and the Meadowhall Shopping Centre. The City Centre will remain the main focus for new retail provision in planning policy terms, which will be strengthened by the development of a new major retail-led mixed use regeneration

¹⁹ All Party Parliamentary Group on Housing and Care for Older People (July 2011): Living Well at Home Inquiry

scheme which will form a new Retail Quarter (Sevenstone). A new District Centre to provide for day-to-day needs located at Chaucer has partially been completed, with a new Asda opened, however, there is still some vacant retail land.

7.80 The 2012 Sheffield Retail Study Update concludes that the City Centre's state of vitality and viability has fallen since the 2010 Retail Study, owing to a combined impact of wider economic challenges and the growth of the internet and out of centre competition.²⁰ The previously anticipated growth in retail spending outlined in the 2010 Retail Study has not been realised. In addition, of the commitments detailed within the 2010 study anticipated to be implemented by 2016, only one is currently under construction, with a further three with planning permission now expired. Out of centre comparison floorspace has increased due to a number of extended and new retail developments. It is clear that there is a significant need for retail development in City Centre and until such a time that the New Retail Quarter is built, continued concern about the City Centre's vitality and viability will remain. Consequently, the report concluded that promoting a new City Centre retail development should remain a priority and any further significant out of town comparison retail development or expansion of Meadowhall would undermine the City Centres role further still.

7.81 Whilst the growth in comparison goods spending has declined in the short term, there remains a need to support the Sevenstone development in the City Centre in order to enhance its regional function. Additional comparison goods floorspace will be needed even after this development, in the order of 24,700 sq m net at 2021 (rising to 59,600 sq m net at 2026). New retail floorspace will be provided in the Primary Shopping Area of the City Centre, and defined District Centres thereafter. Lower levels of convenience floorspace requirements were identified (4,930 sq m net at 2021, rising to 5,470 sq m net in 2026) and directed towards Darnall District Centre, as well as a new proposed District Centre at Chaucer.

7.82 It is therefore considered that the retail sector provides moderate future potential for growth, dependent (to an extent) on the successful delivery of the new Retail Quarter in the City Centre and the new District Centre at Chaucer. Such growth is considered alongside the strategy for directing employment uses to the City Centre, and will not have significant implications for the location of, and demand for, B-class uses.

Tourism

7.83 Tourism-related employment (for example the arts; entertainment; recreation and other services) accounts for a similar proportion of jobs in

²⁰Independent Assessment of the Retail Strategy for Homeware Retail Strategy for Homeware Retailing in Sheffield – Stage 1 report July 2012

Sheffield as might be expected at a regional level, and has an important role within Sheffield's local economy. Experian's job growth projections for the Recreation, Accommodation and Food Services sector suggest an increase of 14.8% over the period 2013-2031.

- 7.84 One third of Sheffield is located in the Peak District National Park, and most if not all City residents have excellent opportunities to access the surrounding countryside and associated recreation and leisure activities, including new indoor climbing centres both opened and proposed as well as heritage landmarks such as Chatsworth House and its parklands and estates. Furthermore, the City offers a variety of other tourist attractions such as the Sheffield Winter Gardens, Millennium Gallery, Sheffield Arena, Pond's Forge, the English Institute of Sport, Ice Sheffield and the Crucible theatre, as well as Meadowhall Shopping Centre which attracts visitors from within the region and beyond.
- 7.85 Sheffield also boasts the largest theatre complex outside London whilst the City's calendar of cultural events (and national and international conference centres), are gaining the City a reputation for culture and creativity, with increasing numbers of visitors to the major attractions reported in recent years. The City plays host to major national and international conferences, many of which choose to host events in Sheffield following on from the City's reputation and expertise in Advanced Manufacturing and associated fields. The Sheffield Economic Strategy seeks to do more to unlock the City's potential as a tourist destination, with resulting increases in employment and independent business growth.
- 7.86 Importantly, the cultural and lifestyle qualities which contribute to Sheffield's tourism industry also contribute the important lifestyle factors which are critical to attracting and sustaining those high value industries referred to above, such as Financial and Business Services, Advanced Manufacturing and Engineering, Information and Communications Technology, and Creative and Digital Industries all of which are predicted to offer strong to moderate growth.
- 7.87 Overall, tourism-related employment in Sheffield is expected to grow over time in response to the City's cultural and recreation assets, with implications for direct employment growth as well as providing a key opportunity to raise Sheffield's national profile and encourage inward investment in associated high-value industries. Other than the indirect implications for the high value industries (as discussed above), direct employment in tourism related uses would, however, have a negligible impact upon demand for B-class premises.

Summary

7.88 Table 7.1 summarises the economic growth potential of different industrial sectors with respect to Sheffield.

Table 7.1 Economic growth potential of different industrial sectors with respect to Sheffield

Sector	Current Representation in Sheffield	Future Growth Potential in Sheffield
Financial/Business Services	Moderate	Moderate/Strong
Distribution	Moderate	Moderate
General Manufacturing	Moderate/Strong	Low/Moderate
Advanced Manufacturing/ Engineering	Strong	Strong
ICT	Moderate	Moderate/Strong
Environmental Technologies	Moderate	Moderate/Strong
Healthcare/Biotechnology	Moderate	Moderate/Strong
Creative and Media	Moderate	Moderate/Strong
Construction	Low	Low

7.89 Despite the potential for moderate to strong growth in health and social care, as well as tourism related employment, such sectors will have very limited implications or requirements for B-class employment premises and/or land.

7.90 Overall, therefore, Table 7.1 indicates that Sheffield City is considered to have moderate/strong or strong future growth prospects in the following sectors:

- Financial/Business Services;
- Advanced Manufacturing;
- ICT;
- Environmental Technologies;
- Healthcare/Biotechnology; and
- Creative and Media.

7.91 This suggests that the growth prospects of Sheffield appear to be relatively strong in spite of the current economic downturn, with the potential to capitalise on existing locational advantages and drive additional long term growth.

Conclusions

7.92 With respect to the future need for employment land and premises, the analysis above suggests a continuation of the recent trends identified in Section 2.0. Demand for high-grade commercial offices is likely to remain strong (in the medium and longer term), whilst demand for (B2)

factory units will reduce as (general) manufacturing industry continues to decline.

7.93 There remains some scope, and associated future floorspace requirements, for advanced manufacturing in Sheffield on the back of the City's reputation and 'global brand'. Demand for large scale distribution units in accessible and low cost locations may be difficult to provide in Sheffield due to the City's topography.

7.94 There are a number of sectors with high growth potential where Sheffield enjoys some locational advantages that leave the City well placed to compete for future opportunities. Sheffield has significant strengths in Advanced Manufacturing and Materials (AMM) and can build on its reputation and track record to provide strong growth in this sector in future years. Moderate to strong growth is also expected in Financial and Business Services; ICT; Environmental technologies; Healthcare/biotechnology; and Creative and Digital industries commensurate with those business sectors to be supported and accelerated as per Sheffield's Economic Strategy. The growth prospects of Sheffield are therefore relatively strong, with the potential to drive further long term growth in key 'target industries'.

8.0 Future Employment Space Requirements

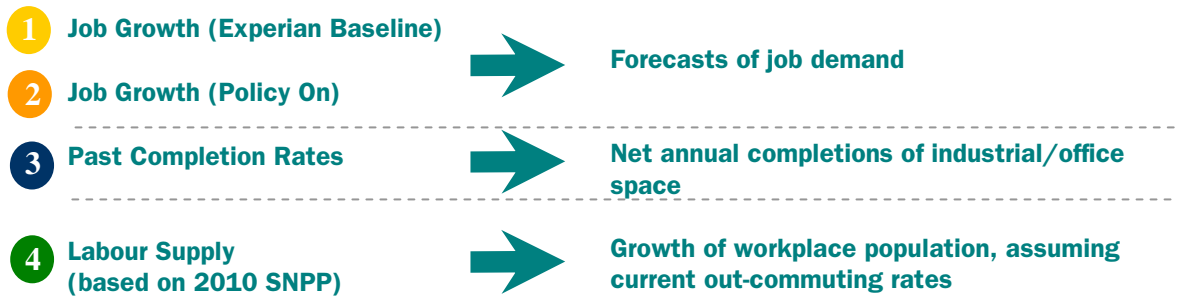
Introduction

- 8.1 This section assesses B Class employment space requirements in Sheffield for the Plan period 2013-31 using several different approaches:
- a forecasts of employment growth in the main B class sectors (**labour demand**) derived from the latest available economic forecasts;
 - b consideration of **past trends in completions of employment space** based on monitoring data supplied by the Council, and how these might change in future;
 - 2 considering population forecasts and future growth of local **labour supply** and the amount of jobs and employment space that this can support.
- 8.2 All these approaches have some limitations and careful thought needs to be given as to how appropriate each is to circumstances in Sheffield. In addition, and to be robust, the economic growth potential and likely demand for employment space in Sheffield needs to be assessed under different future scenarios, to reflect lower or higher economic growth conditions arising in the future. Other factors that may influence future economic conditions in the City have also been considered including:
- the pace of future national economic growth following severe recession(s);
 - the rate of formation of new businesses in the City;
 - Sheffield's record of attracting inward investment in recent years;
 - vacancy levels for both industrial and commercial floorspace;
 - the implications of the introduction of permitted development rights for change of use from B1(a) offices to C3 residential;
 - the land needs of potential growth sectors in the City;
 - the need to replace employment space lost to other uses;
 - wider trends (i.e. so-called 'landless growth') that could reduce amounts of employment space needed per worker, such as denser occupation standards and hot-desking; and,
 - competition for new investment by the Sheffield City Region Enterprise Zone. This comprises 145ha across 6 development areas along the M1 Corridor, much of which is located in Sheffield/Rotherham.
- 8.3 It is important to recognise that there is not always a clear cut relationship between employment change and employment land needs. Additional employment space can be needed even if employment itself is falling, for example if a manufacturing firm requires more space to

enable greater automation and achieve job reductions through productivity gains. Furthermore, it is possible that unmet demand from Rotherham and Barnsley could potentially be addressed through over-providing employment land on strategic, sub-regional sites in Sheffield.

8.4 Accordingly, this has framed the consideration of four scenarios to help understand the implications of different assumptions on future demand outlined in Figure 8.1 and detailed below.

Figure 8.1 Range of Growth Scenarios/Approaches



Job Growth Forecasts

1. Experian Baseline Job Growth Model

8.5 Forecasts of job growth for Sheffield City up to 2031 were obtained from Experian Business Strategies. It should be emphasised that such forecasts tend to be most reliable at regional and national scales and consequently less so at the local economy level, but are widely recognised as a valuable input and can indicate the broad scale and direction of economic growth in different sectors to help assess future employment space requirements.

8.6 The forecasts of job growth by sector used here reflect recent trends and economic growth projections at national and regional level, and how economic sectors in Sheffield have fared relative to Yorkshire and The Humber's growth in the past. These forecasts also reflect the current post-recession economic climate. These forecasts are not constrained by labour supply or land availability.

8.7 The overall employment change in Sheffield resulting from these forecasts is shown in Table 8.1, along with expected job growth in the main B-class sectors. This includes some jobs in Non B-class sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities (see Appendix 2).

8.8 This indicates modest net job gains (approximately 1,690 jobs) in the B-use classes in Sheffield over the period to 2031, with strongest growth

in office-based activities, modest growth in distribution employment and a significant reduction in manufacturing employment (primarily from the metal product manufacturing sector, which would account for over 60% of the total B1c/B2 reduction alone). This is within the context of overall job growth of almost 21,800 predicted for the City over the next 18 years. Growth in non-B class sectors is expected to be particularly strong in administration and support, other private services, education, accommodation and food services, health, and residential care & social work sectors.

Table 8.1 Forecast Employment Change in Sheffield 2031-31

	No. of Jobs		Change
	2013	2031	2013-31
Offices (B1a/b)*	49,940	59,020	+9,080
Manufacturing (B1c/B2)**	31,780	23,110	-8,670
Distribution (B8)***	18,140	19,420	+1,280
Total B-class Jobs	99,850	101,540	+1,690
Non B-class Jobs	171,650	191,750	+20,100
Jobs in All Sectors	271,500	293,290	+21,790

Source: Experian/NLP analysis 2013 - total jobs including self employed

* includes a proportion of public administration and administration & support services ** includes vehicle repair, some utilities and some construction activities ***includes parts of wholesale and land transport, storage and post that use B8 warehousing land

8.9 These job forecasts for Sheffield were then converted to future employment space requirements assuming typical ratios of jobs to floorspace for the different B uses.²¹ To estimate space needs, the following average ratios have been applied:

- offices: 1 job per 12.5 m²
- industry: 1 job per 42 m²
- warehousing: 1 job per 65 m² is assumed for general, smaller scale warehousing, and 1 job per 74 m² for large scale/high bay distribution units. On the basis of current market intelligence (see Section 4.0) it is understood that there is likely to be a slight bias towards high-bay warehousing coming forward in Sheffield over the 18-year Plan period, hence a split 60:40 of high bay:low bay/general warehousing has been used.

8.10 An adjustment has been made to reflect the fact that vacancy rates are currently 4.2% for industrial and 19.4% for commercial floorspace in Sheffield²². On the basis that a figure of 10% better reflects 'normal' market conditions, the model has assumed that there is a need for lower levels of office floorspace to allow for a reduction down to 10% by 2031,

²¹ Based on HCA/Offpat Employment Densities Guide, 2010; figures are gross external floorspace [GEA] per job

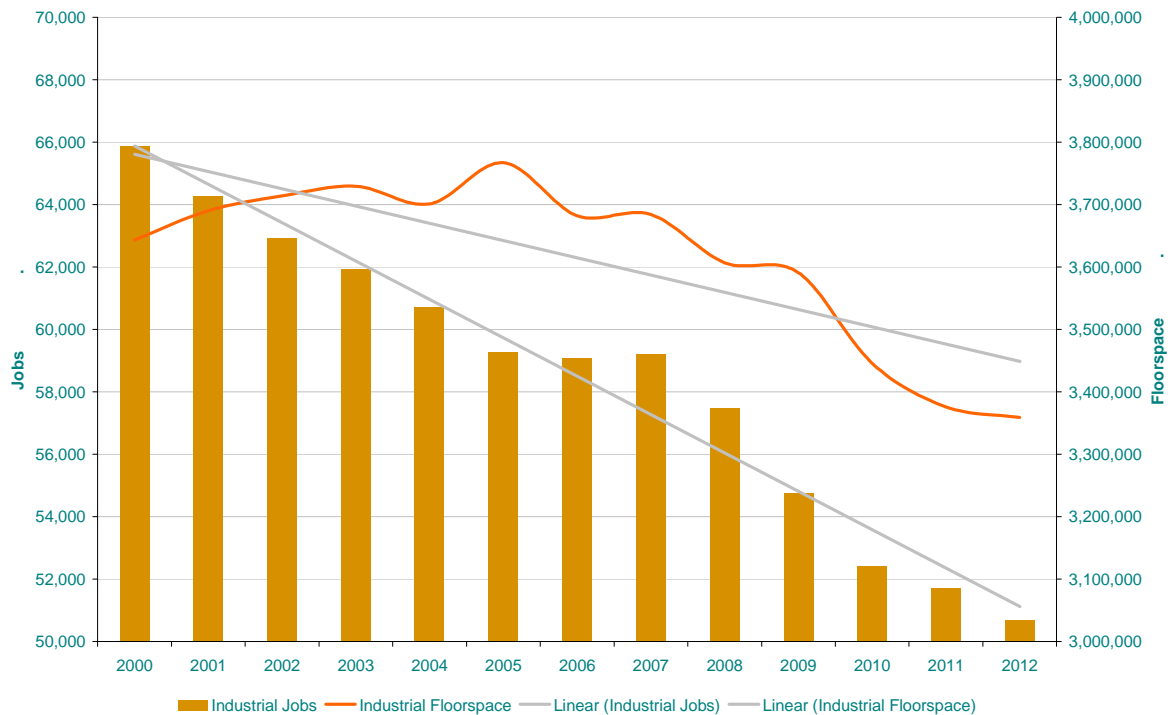
²² On the basis of an assessment of commercial property websites in February 2012, set against the Business Floorspace (Experimental Statistics) published in May 2012 by the VOA. The realism of these figures has been tested with local agents, who broadly agreed with the figure for offices and industrial uses.

but conversely, more industrial space is required due to a current 'tight' market, with smaller units in particular demand.

8.11

The relationship between job growth and floorspace is, however, not straightforward. As can be seen in Figure 8.2, whilst both industrial jobs and floorspace declined between 2000 and 2012, the former did so at a much steeper rate: -23%, compared to a -8% fall in floorspace. Industrial GVA²³ has also fallen sharply over the same timeframe, although again at a lower rate (-13%) than jobs. As such, where a reduction in industrial jobs is forecast, the associated negative floorspace was halved, to reflect the fact that not all of this employment space is likely to be lost.

Figure 8.2 Comparison of Historic Industrial Jobs/Floorspace in Sheffield City



Source: NLP analysis/Experian/ Experimental Business Floorspace Statistics 2000-2012 (VOA)

8.12

The resulting floorspace requirements for this scenario are set out in Table 8.2 and indicate negative demand for some -9,035 m² of industrial space (i.e. manufacturing and distribution combined) and +66,240 m² of office space by 2031. It is important to reiterate that projecting industrial land demand through the use of job forecasting is problematic as it takes no account of replacement/churn and the need for relocation due to modernisation etc.

²³ GVA measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom. It is effectively the difference between output and intermediate consumption (the cost of raw materials and other inputs used in production).

Table 8.2 Experian Job Growth Scenario: Net Employment Floorspace Requirements in Sheffield, 2013-31

	Floorspace (m ²)
Office space (B1a/b)	66,240
Industrial (B1c/B2)	-182,085
Warehousing (B8)	173,050
All	57,210

Source: NLP analysis (figures rounded)

2. Policy On Job Based Estimate

- 8.13 An alternative job based estimate of future needs has been compiled that has been termed the Regeneration, or 'Policy-On', scenario. Following detailed discussions with SCC Planning and Economic Regeneration Officers, the individual industrial classifications used in the Experian Baseline forecasts were re-assessed to test whether there were any concrete policy justifications for modifying any of the categories. It is recognised that limited conclusions can be drawn from the results of such an approach, as Experian's forecasts for Sheffield are complex and internally consistent with those of other authorities in the region.
- 8.14 With this caveat in mind, the Experian forecasts do not take into account the job growth implications of new or planned developments at local authority level. Discussions with Economic Development Officers at SCC indicated the following significant proposals/developments, including the Sheffield City Region Enterprise Zone, that are likely to propel job growth in key sectors over the next few years:
- **Sheffield City EZ 4,200 jobs:** allocated to the 13 manufacturing sectors pro-rata, on the basis of their 2013 representation in the City, and applied to the Experian Baseline forecasts²⁴;
 - **New Retail Quarter 1,324 direct and 1,890 indirect jobs:** split on a pro-rata basis between retail, accommodation & food services and recreation and added to the Experian baseline;
 - **Regional Growth Fund 2,000 jobs:** non-specific, so split amongst all sectors on a pro-rata basis and applied to the Baseline;
 - **Heart of the City 400 jobs:** relating specifically to B1a office space.
- 8.15 Table 8.3 presents the resultant job growth adjustments made to the forecasts to provide an estimation of the amount of employment that could be achieved in the City should certain high growth policy initiatives or developments come forward as planned:

²⁴ i.e. Machinery & equipment manufacture comprised 2,020 jobs in 2013 in Sheffield, or 9% of the total manufacturing jobs in the City. It would therefore be allocated approximately 375 of the total EZ jobs, which would then be added to the Experian Baseline job forecasts for that sector.

Table 8.3 Policy On Scenario - Forecast Employment Change in Sheffield 2013-31

	No. of Jobs		Change
	2013	2031	2013-31
Offices (B1a/b)	49,935	56,790	9,855
Manufacturing (B1c/B2)	31,775	27,540	-4,235
Distribution (B8)	18,135	19,550	1,410
Total B-class Jobs	99,850	106,880	7,030
Non B-class Jobs	171,650	196,225	24,575
Jobs in All Sectors	271,500	303,105	31,605

Source: Experian/NLP/SCC analysis 2013 - total jobs including self employed

- 8.16 The resultant job growth is around 9,815 higher under this scenario than the Experian Baseline (equal to the additional jobs outlined in paragraph 8.14 above). These employment forecasts were then converted to floorspace requirements in a similar way to the Experian baseline forecasts above. This translates into a net requirement of +186,235 sqm to 2031, a figure 129,025 sqm higher than the Experian baseline.

Table 8.4 Policy On Scenario: Net Employment Floorspace Requirements in Sheffield, 2013-31

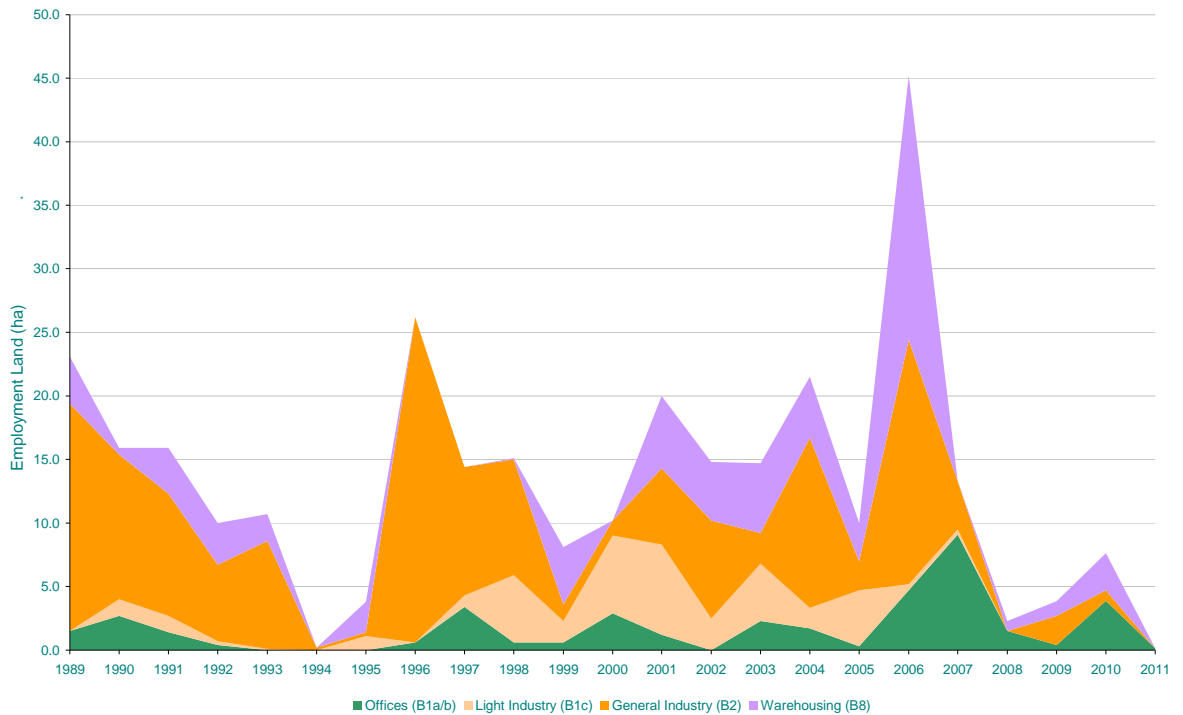
	Floorspace (m ²)
Office space (B1a/b)	76,800
Industrial (B1c/B2)	-88,970
Warehousing (B8)	183,395
All	171,230

Source: NLP analysis (figures rounded)

3. Past Completion Rates

- 8.17 Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a reasonable basis for informing future land needs, particularly where land supply or demand has not been unduly constrained historically. However, the future demand picture may not reflect past trends and some adjustments may be needed.
- 8.18 Data on past completions by B class sector was provided by SCC and discussed in detail in Section 6.0. This scenario simply assumes that future development rates of employment space up to 2031 will be similar to those that have occurred in Sheffield over the last decade. As this period covered both strong growth and recession in Sheffield, it could provide a reasonable basis for future planning.

Figure 8.3 Employment Land Development Rates (ha) within Sheffield 1989-2011



Source: Sheffield City Council (January 2013)

8.19

This would produce a requirement for around 311,040 sqm (43.2ha) more office space, and 787,680 sqm (196.94ha) more industrial space (Table 8.5). In total, this would indicate demand for approximately 1,098,720 sqm (240.12ha) of employment space by 2031, a figure substantially more than that estimated using the econometric job forecasts. The key difference is that this approach indicates a need for substantially more B2 industrial floorspace, while the job-based forecasts indicate the opposite. It is considered that this approach better reflects agents' views and also the Sheffield Core Strategy approach.

Table 8.5 Employment Space Requirement based on Past Trends Continuing, 2013-31

Sector (Use Class)	Average annual completion rate 2001-11	2013-31 Requirement	Average annual completion rate 2001-11	2013-31 Requirement
	Floorspace (sqm) *		Land (hectares)	
Office space (B1a/b)	17,280	311,040	2.40	43.20
Industrial (B1c/B2)	26,320	473,760	6.58	118.49
Warehousing (B8)	17,440	313,920	4.36	78.44
All	78,320	1,409,760	13.34	240.12

Source: NLP analysis / SCC Business and Industrial Land /AMR 2010/11 records

*Floorspace figures unavailable from SCC – estimated through the application of standard 40%/200% plot ratios as per the Experian Baseline, with the office land split 80:20 out:in centre on the basis of past take up rates

- 8.20 This approach assumes that past trends of development would continue unchanged, and may not fully reflect changes in the economy once it fully emerges from recession. It may also underestimate future demand if the supply was constrained in the past, for example because of few sites available or infrastructure/funding factors. On the other hand, future development rates for industrial space may be less than historically as the sector rationalises and/or makes more efficient use of space.
- 8.21 It is considered that a strong argument could be made that as the very high level of take up that was achieved in 2006 was directly related to the 17ha 'SIRFT' (Sheffield International Rail Freight Terminal) on the former Tinsley Marshalling Sidings, Europa Link²⁵, this has distorted the overall figures. For example, it could be argued that such development may not be seen again over the plan period for a combination of reasons, with the local agents workshop suggesting that such large scale developments were unlikely in Sheffield for the foreseeable future due to the lack of similarly large sites without topographical constraints.
- 8.22 Furthermore, the move towards a more Business Services-orientated economy with significantly higher employment densities; the restructuring of the traditional manufacturing economy with the potential for 'recycling' of older sites; the Government's proposals to facilitate the change of use from B1a office to residential without the need for planning permission; the long term impacts of the recession(s); the significant reduction in public sector spending available to deliver difficult brownfield sites; and the need to consider alternative uses for existing B-class allocations (i.e. for waste and recycling) all suggest that the take up rate should be reduced in future.
- 8.23 On this basis, it was agreed to exclude the SIRFT site from the overall figures, which would have the effect of reducing the average annual take up by 1.7ha, from 13.34ha per annum to 11.64ha per annum. This would have the effect of reducing the requirement as outlined in Table 8.6.

²⁵ Phases 1 and 2 – these are 2 warehousing or industrial buildings of 30,900 sqm and 26,900sq.m, or 59,750 if combined. They cover around 17 hectares

Table 8.6 Employment Space Requirement based on Past Trends Continuing, 2013-31

Sector (Use Class)	Average annual completion rate 2001-11	2013-31 Requirement	Average annual completion rate 2001-11	2013-31 Requirement
	Floorspace (sqm) *		Land (hectares)	
Office space (B1a/b)	17,280	311,040	2.40	43.20
Industrial (B1c/B2)	22,920	412,560	5.73	103.14
Warehousing (B8)	14,040	252,720	3.51	63.18
All	54,240	976,320	11.64	209.52

Source: NLP analysis / SCC Business and Industrial Land /AMR 2010/11 records

*Floorspace figures unavailable from SCC – estimated through the application of standard 40%/200% plot ratios as per the Experian Baseline with the office land split 80:20 out:in centre on the basis of past take up rates

4. Labour Supply Growth

- 8.24 To provide a benchmark for comparison with these three demand estimates, the employment space requirement that would result from anticipated housing and hence population growth in Sheffield was estimated.
- 8.25 Under this scenario the ONS 2010-based Sub-National Population Projections [SNPP] were used to calculate population growth over the plan period. Published in 2012, these indicate that the total population of Sheffield will increase by 59,600 residents²⁶ between 2013 and 2031²⁷, primarily driven by an upsurge in births and international migration (counter-balanced to an extent by high levels of domestic net out-migration). Based on data from the 2010-based SNPP, it is further estimated that the working age population of Sheffield will increase by approximately 38,200 residents over that time period, which also reflects the Government's proposals to increase the pension age for both men and women over that time period.
- 8.26 By assuming that the economic activity rate remains constant at the 2011 rate of 73.4%, it is estimated that the number of additional people requiring employment in Sheffield would equate to around 28,040 by 2031. Factoring in the current commuting ratio, whereby (perhaps surprisingly) more people commute out of the City than commute in

²⁶ This assumes that housing provision will be sufficient to maintain past trends. Current housing targets are lower than recent past build rates. SCC estimate that population may only grow by 23,150 (2013-31) based on planned housing provision.

²⁷ Note: it is recognised that the ONS has released an Interim update to these figures, incorporating the 2011 Census. The resultant Interim 2011-based SNPP, however, is not intended for long term modelling purposes and only provides data from 2011-2021, hence the 2010-based SNPP has been retained for use in this ELR.

(resulting in a ratio of 1.042²⁸), it is considered that the net job growth Sheffield should plan to accommodate under this scenario would be in the order of 29,220 between 2013 and 2031.

8.27 Assuming no significant change in commuting patterns and that the split between B-class/non B-class employment in the City remains as per the Experian Baseline forecasts (36:64), this estimate suggests that around 10,120 residents will seek B class employment in Sheffield (Table 8.7).

Table 8.7 Forecast labour supply change in Sheffield 2013-31

	Change 2013-2031
Resident labour supply	38,200
Workplace labour supply	29,220
B-class job requirement	10,120

Source: NLP analysis

8.28 The resulting increasing job numbers were then translated into estimated requirements for B class employment floorspace by applying the same job/floorspace ratios used in the job growth based approach and applying similar vacancy allowances as with the Experian baseline. If the proportions seeking office and industrial jobs are similar to those indicated by the Experian employment forecasts, providing just enough jobs for this projected increase in resident workers would require around 429,760 sqm of employment space (Table 8.8).

Table 8.8 B Class Floorspace Required from Labour Supply Growth

	Floorspace (m ²)
Office space (B1a/b)	22,170
Industrial (B1c/B2)	183,755
Warehousing (B8)	223,840
All	429,760

Source: NLP analysis *figures rounded

8.29 This labour supply based estimate provides a benchmark for comparison with other approaches and sits between the higher past take up figures and much lower job-based projections.

²⁸ Calculated on the basis that the BRES 2011 dataset records that 243,276 people were working in the City, compared to the Annual Population Survey's report that 253,500 residents living in Sheffield were economically active and in employment for the same year, this equates to $253,500/243,276 = 1.0420$

Floorspace Requirements

Net Employment Space Requirements

8.30 Drawing together the results from these different approaches and growth scenarios, Table 8.9 summarises the net floorspace requirement up to 2031 arising from each.

Table 8.9 Net Floorspace Requirement to 2031 for Different Growth Scenarios

Scenario Use	Labour Demand		3. Past Take-Up Continues	4. Labour Supply Growth
	1. Experian Baseline Job Growth	2. Policy On		
Office space (B1a/b)	66,240	76,800	311,040	22,170
Industrial (B1c/B2)	-182,085	-88,970	412,560	183,755
Warehousing (B8)	173,050	183,395	252,720	223,840
All B Uses	57,210	171,225	976,320	429,760

Source: NLP analysis

Note: totals rounded

8.31 The different approaches and forecasts produce a wide range of potential space requirements. For B1c/B2 industrial space, this equates to between -182,085 sqm (Experian baseline) and +412,560 sqm (based on past development rates). For office space, the range is just as wide, albeit all forecasts are positive - between 22,170 sqm (Labour Supply) and +311,040 sqm (based on past take up).

Safety Margin

8.32 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to give some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development. This margin is a contingency factor, providing a modest additional land buffer so that supply is not too tightly matched to estimated demand, and so that shortages of land do not arise if future demand turns out to be greater than the forecasts. Such flexibility is sensible given the uncertainties in the forecasting process and the scope for delays in developing employment space.

8.33 The South East England Partnership Board [SEEPB] guidance on employment land reviews (July 2009) recommends an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years. For Sheffield, the margins set out in Table 8.10 were applied for B Class use based on two years of average net take-up.

Table 8.10 Safety Margin Allowances

Use	Average Annual Take-up (net)	Safety Margin Added 2013-31	Average Annual Take-up (net)	Safety Margin Added 2013-31
	Floorspace (sqm)		Land (ha)	
Offices (B1a/B1b)	17,280	34,560	2.40	4.80
Industrial (B1c/B2)	22,920	45,840	5.73	11.46
Warehousing (B8)	14,040	28,080	3.51	7.02
TOTAL	54,240	108,480	11.64	23.28

Source: NLP analysis / SCC BILS data on past take up rates

Convert to Gross Floorspace Requirements

- 8.34 To convert the net requirement of employment space into a gross requirement (the amount of employment space or land to be allocated), an allowance is also typically made for some replacement of losses of existing employment space that may be developed for other, non B Class uses.
- 8.35 Judgements were made on the suitability and degree of the allowance for future losses which it would be appropriate to apply here based on the consultants' understanding of supply-side factors in Sheffield and current trends in the market. Not all losses need to be replaced as some will reflect restructuring in the local economy as less space may be needed in some sectors in future. However, some replacement is needed to avoid employment land supply continually declining.
- 8.36 In particular, whilst it is difficult to quantify the impacts at present, the Government has confirmed the introduction of permitted development rights for change of use from B1(a) offices to C3 residential. It is expected that these new rights will come into force in spring 2013 for a period of at least three years.
- 8.37 SCC submitted an application to the Government for an exemption from the permitted development rights on the basis that this could lead to substantial adverse economic consequences that would not be offset by the positive benefits that the new rights would bring. The exemption was turned down, and SCC is considering whether an appeal is warranted and/or justified.
- 8.38 Nevertheless, the proposed exemption covered only a handful of strategically important office sites that are Priority Office Areas as identified in the adopted Core Strategy for Sheffield, and at 11 hectares in total, they cover less than 4% of Sheffield City Centre, less than 0.5%

of all commercial areas in the City and are a tiny proportion of the City as a whole covering 0.048% of the local planning authority area²⁹.

- 8.39 Even if an appeal to the exemption application was granted, the permitted development rights to conversion from commercial to residential would therefore still apply for the vast majority of the City. This raises a number of critical questions, not least the impact this could have on the overall demand/supply balance of office space in Sheffield. It could, for example, exacerbate the existing shortfall in Grade A City Centre office space.
- 8.40 Furthermore, the Core Strategy and emerging City Policies and Sites DPD aim to rebalance the stock of office and industrial floorspace in Sheffield, identifying various City Centre transition areas, whereby the existing industrial/office uses will be encouraged to relocate.
- 8.41 For example, Sheffield has had significant losses of office space to non B class uses in the past 2 years alone, with the recent exemption application recording that 51 applications in total have been either granted planning permission (47) or refused planning permission (4) for change of use/conversion/alteration from office to residential use. As noted above, this may continue to some extent in future as large vacant office blocks remain, but it is critical that Sheffield needs to maintain a reasonable level of office space, and particularly Grade A floorspace in the City Centre.
- 8.42 From discussions with SCC, it is understood that the latest SHLAA for Sheffield estimates that around 74 sites that are currently allocated/existing B1, B2 and B8 land have now been identified in the SHLAA as being deliverable / developable for housing over the Plan Period. This totals 21.8ha gross (19.23ha net), or 1.45ha per annum gross (1.28ha net) over the next 15 years. Losses to residential uses has comprised around half of all losses of employment land over the past ten years. However, the SHLAA data clearly does not include other potentially unknown 'windfall' sites that are likely to come forward over the plan period, hence using the SHLAA data alone is likely to underestimate total losses.
- 8.43 As such, and balancing the various issues outlined above, it is considered that a reasonable level of employment land losses that might be expected to continue over the plan period could equate to around **4ha per annum, or around half the level achieved over the past ten years or so** (estimated to equal 5,940 sqm B1a/b; 7,875 sqm B1c/B2 and 4,825 sqm B8 based on the plot ratios set out below). This factors in the data from the SHLAA, planning policy changes and the declining level

²⁹SCC (February 2013): Permitted Development Rights for Change of Use from Commercial to Residential: Application for Exemption Sheffield Local Plan Priority Office Areas

of losses since the 2007/08 recession, whilst allowing for some future losses occurring and providing the ability to replace/decant older stock³⁰.

8.44

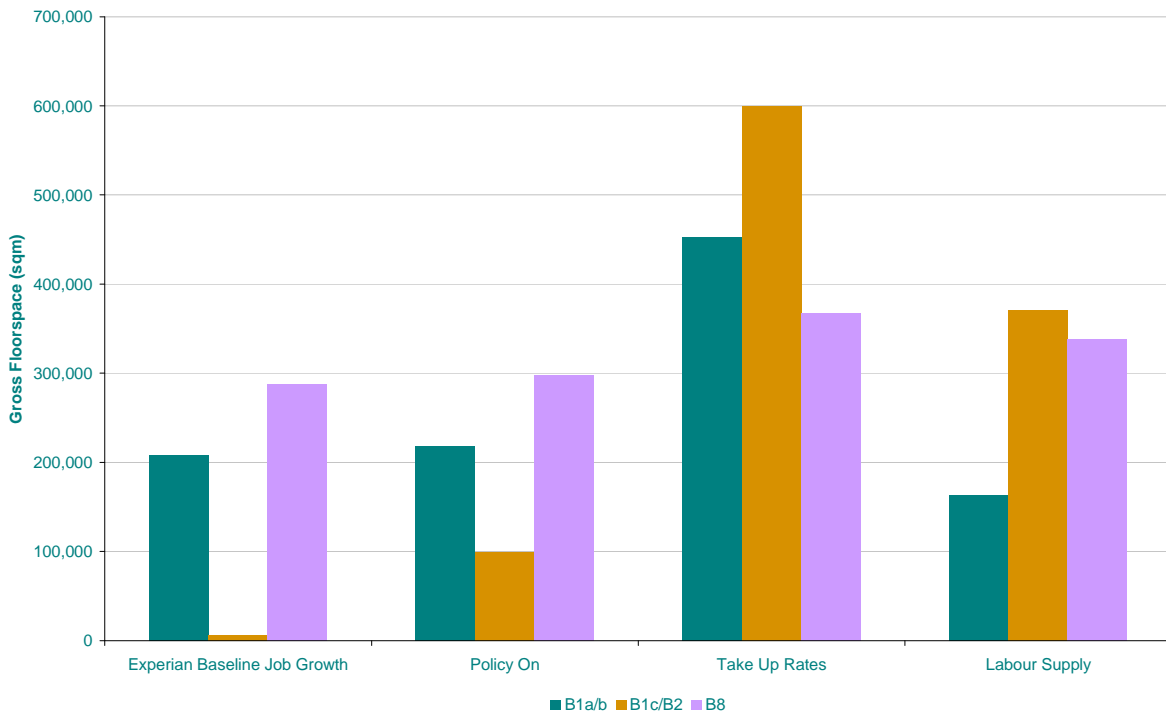
The resultant gross floorspace requirements incorporating these allowances (losses and margin of choice) are set out in Table 8.11 and Figure 8.4.

Table 8.11 Gross Floorspace Requirement to 2031

Scenario Use	Labour Demand		3. Past Take-Up Continues	4. Labour Supply Growth
	1. Experian Baseline Job Growth	2. Policy On		
Office space (B1a/b)	207,610	218,245	452,485	163,615
Industrial (B1c/B2)	5,530	98,645	600,175	371,365
Warehousing (B8)	287,975	298,320	367,645	338,765
All B Uses	406,080	615,215	1,420,305	873,750

Source: NLP analysis Note: totals rounded

Figure 8.4 Gross Floorspace Requirement by Scenario



Source: NLP analysis

³⁰ As the data on losses is not able to be broken down by specific B1/B2/B8 use type, the assumption has been made that the pattern of losses will be broken down on the same basis as past take up of employment land

Estimated Land Requirement

8.45

The final step was to translate floorspace into land requirements for both office and industrial uses. The job/floorspace ratios and plot ratios adopted here reflected those in the ODPM guidance³¹ and reflect typical development densities for these uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using the following assumptions:

- **Industrial** – a plot ratio of 0.4 was applied so that a 1 ha site would be needed to accommodate 4,000 sqm of employment floorspace; and
- **Offices** – Information provided by SCC indicates that since 1990, plot ratios have averaged around 1.75 in Sheffield City Centre, and around 0.3 out of centre. On this basis, it is considered reasonable to assume that given the trend towards higher densities due to more efficient working practices, the majority of future office development in the City Centre will be around 2.00 in future, and 0.4 out of centre.
- In terms of the split between City Centre/Out of Centre office space in future, the adopted Core Strategy places a strong emphasis on the City Centre in order to promote it as a centre for headquarters, albeit complemented by out of centre locations comprising less expensive sites with good transport links. The CS seeks to provide at least 65% of the total office development in Sheffield City Centre. Based on an analysis of past trends, it appears that whilst the split of land has been around 20:80 in/out of centre, due to higher densities for the former, the split of floorspace over the past 20 years or so has been around 62:38 in:out of centre. It appears reasonable to assume that with appropriate planning policy backing, a rate of 65:35 for office floorspace could be achieved. This approximate split was also supported by commercial agents at the workshop as long as newer Grade A offices were allowed in the City Centre.
- For modelling purposes, it has therefore been assumed that around 65% of all office floorspace coming forward will be in/edge of centre, at the higher plot ratio of 2.0, whilst the remainder will come forward in out of centre locations at the lower plot ratio of 0.4.

8.46

The resulting land requirements are set out in Table 8.12, with the process of the driving this figure outlined in Figure 8.5. The Figure identifies the range of net total B-class land requirements resulting from the four modelled scenarios (ranging from 6ha to 210ha); incorporating a flexibility margin of choice (23.3ha, or two years past take up) and an

³¹ Employment Land Reviews Guidance Note, ODPM (2004)

allowance for losses (72ha, or 4ha per annum). The result is a range of gross employment land requirements from 101ha at the bottom end (equal to the Experian Baseline Job growth projection) to a high of 305ha based on the past take up scenario.

Table 8.12 Gross Land Requirement by Scenario (ha) 2013-31

Scenario Use	Labour Demand		3. Past Take-Up Continues	4. Labour Supply Growth
	1. Experian Baseline Job Growth	2. Policy On		
Office space (B1a/b)	27.6	28.9	62.8	22.3
Industrial (B1c/B2)	1.4	24.7	150.0	92.8
Warehousing (B8)	72.0	74.6	91.9	84.7
All B Uses	101.0	128.1	304.8	199.8

Source: NLP analysis Totals rounded

Figure 8.5 Methodology for Defining Gross Requirement



Source: NLP

Sensitivity Tests

- 8.47 Given the wide range of potential requirements implied by these different estimates of future requirements, it is important to test how reasonable each appears against other factors and how sensitive they are to different assumptions.
- 8.48 Assumptions which can make a significant difference to the forecasts of future requirements are the scale of the safety margin and allowance for replacement of future losses. With no allowance for future losses, the highest estimate of future industrial space needs would fall by approximately 57ha, or about 3ha per annum. For the Experian job based estimate, this factor would reduce the industrial requirement to

less than zero. For offices, the comparable figures are 15ha, or 0.8ha per annum. These are significant but the allowances made are much more modest than for the industrial uses.

- 8.49 The safety margin allowances used here are also fairly modest. For the highest estimate of employment space requirements, the safety margin equates to 8% of the total demand estimate. Towards the lower end of the range (e.g. the Experian job based estimate), however, it equates to 23% of the total requirement. In earlier studies of this type (and notably the preceding Sheffield ELR methodology which informed the Core Strategy requirement), margins of 40 - 50% have been assumed so these assumptions do not appear unreasonable. In more marginal demand locations, there may be greater delays in bringing sites forward and there appears a tight supply of employment land, hence this level of safety margin is necessary. This issue can be considered further in the context of any surplus in supply and in considering whether additional supply is needed for other reasons.
- 8.50 The assumed plot ratio for office development appears unlikely to make a significant difference to land requirements since the office land requirement is fairly modest and varying the assumed plot ratio for future development, from 2.0 to 1.5 for example, for part of this requirement would make only a small difference (i.e. it would increase the office requirement under the Experian Baseline scenario from 27.6ha to 28.3ha, a difference of less than 1ha).
- 8.51 Overall, it is the choice of approach and growth scenario which most affects the level of future requirements and this will need to be carefully considered by the Council in selecting a basis for future planning.
- 8.52 It is also important to consider which estimate best accords with market views of future demand in the area, although these are perhaps reliable mainly for the short term picture. From discussions with local commercial agents during the workshop, the general view was that the relatively high levels of B2/B8 industrial demand experienced in the past are unlikely to be repeated as these past figures have included large regeneration schemes such as SIRFT, which are no longer in the pipeline (i.e. these opportunities have been exhausted). There remains demand for high quality grade A offices in the City Centre, although there is too much poor quality stock at present and there needs to be a rebalancing of the portfolio accordingly.
- 8.53 This points towards using a demand estimate that reflects a realistic level of land requirements excluding 'abnormal' regeneration schemes such as SIRFT and takes account of likely labour supply growth in the area. The Experian baseline job forecasts appear unduly pessimistic with regard to industrial space and do not incorporate the likely impact of economic growth aspirations and proposed developments such as the Sheffield City Region Enterprise Zone. The scenario which does take such measures into account (the policy on scenario) is more than 25%

higher than the baseline, whilst the strong population growth forecast for the City over the next 18 years or so points to a higher level of need still.

- 8.54 However, even planning on the basis of indigenous labour supply growth may underplay the City's economic potential particularly as Sheffield can draw labour from a wider area of South Yorkshire, notably Rotherham. This could point towards the past trends estimate as a more aspirational basis for planning.

Non B Uses

- 8.55 The development needs of economic sectors other than the B use classes were also considered. These are likely to be modest relative to the land requirements of offices for business and industrial uses. These other sectors will compete for employment land to a point, although the extent and nature does not appear likely to cause particular pressures on land supply. The needs of certain Sui Generis uses, notably the energy, environmental and low carbon industries targeted in the draft Economic Strategy for Sheffield, could potentially have significant land requirements over the coming years, although at present it is not possible to definitively identify how much, and where, land requirements are likely to be.

- 8.56 Tourism could also have a prominent role to play in growing the number of jobs in the local economy, raising awareness and improving perceptions of Sheffield as a gateway to the Peak District at a national level, although this sector will again generate limited employment land requirements. This sector could help to further diversify the economy, however, boosting levels of self employment and helping to reduce out-commuting.

- 8.57 Consideration should also be given as to whether the growth of some sectors could be accommodated in existing employment areas in a way that improves sustainability and enhances the attractiveness of the site as an employment location. This may have some scope, subject to strict controls, to avoid adverse pressures on landowners from higher value uses thereby reducing the potential for lower value B Class development.

Summary

- 8.58 This section has appraised a range of employment land projections for Sheffield City using a variety of methodologies. It is important to identify an appropriate level of need that achieves a balance between market realism and economic and planning policy objectives. A range of qualitative and quantitative factors have been considered within this report that can help to inform a judgment on the appropriate level of need, with the key issues set out below:

- Sheffield has many advantages as an industrial location, with many established international companies, a number of smaller, burgeoning advanced manufacturing companies and competitive business rates. Opportunities also exist for land-hungry energy production sectors. However, the City remains over-reliant on the traditional manufacturing sector and particularly its renowned metal manufacturing industries, with weak pre-recession levels of entrepreneurial activity and business health. The City faces topographical challenges restricting the potential availability of large inward investment sites. The City also suffers from an unbalanced commercial and industrial stock, with too much outdated office/industrial floorspace in inappropriate locations;
- Future job growth projections for Sheffield are therefore relatively modest in the medium to long term, with much of the growth likely to be in non-B-class industries;
- The City has an opportunity to develop a competitive advantage as a destination for advanced manufacturing, alongside aspirations to diversify the portfolio to allow for further development in creative and digital industries, energy, business services and healthcare technologies. The Sheffield City Region Enterprise Zone will be key in this regard;
- Take up rates in the City in recent years have been reasonably high, at 11.6ha per annum (excluding SIRFT), although they have dropped off significantly since the 2007/08 recession. The SHLAA identifies the potential future loss of around 19ha of existing employment land to non-B class uses in the years ahead;
- Labour supply analyses indicate that although the number of economically active residents is forecast to grow strongly over the Plan period, with 38,200 additional adults of working age in the City by 2031. If adjustments are made to the unemployment rate and reductions made to the number of out-commuters, then around 152ha (gross) could be required to 2031.

8.59

On the basis of the analysis above, it is considered that around **305ha (gross)** of employment land may be considered appropriate for SCC to plan for to 2031, at a rate of 17ha per annum (85ha every 5-years). This excludes any provision for adjoining authorities, and is approximate to the Past Take Up scenario. This is broken down as follows:

Table 8.13 Land Requirements in Sheffield 2013-31

	B1a/b	B1c/B2	B8	TOTAL
Land Requirements 2013-31	63	150	92	305
Rolling 5-year Land Requirements	17	42	26	85
Floorspace in/edge of-centre 2013-31	294,115 (65%)	600,175	367,645	1,420,305
Floorspace out of-centre 2013-31	158,370 (35%)			

Source: NLP analysis

Review of Current Employment Sites

Introduction

This section assesses the characteristics and quality of provision of employment areas within the City and analyses their suitability to meet future employment development needs. The Council has identified 141 existing employment sites. Given this quantity, it was agreed with Sheffield City Council (SCC) that a more detailed analysis would be undertaken on 81 sites. For the purpose of this assessment the sites are split into 6 sub-areas, reflecting those within the Pre-Submission City Policies and Sites DPD 2013. These sub-area and the sites within the sub-areas analysed by this study are:

Table 9.1 Review of Current Employment Sites

Mosborough /Woodhouse	
Former Asda site Orgreave Place 1	New Street, Longacre Way
Meadowbrook Park	Roterham Road, Beighton
Mosborough Wood Business Park	Scaffold Yard, Orgreave Place
Chapletown/Ecclesfield	
Adjacent Former Hydra Tools, Nether Lane, Ecclesfield	G Fishers Transport Yard, Green Lane, Ecclesfield
Adjacent to disused railway Butterthwaite Lane	Next to Arthur Lee Works, Loicher Lane, Ecclesfield
Former Petrol Depot, Johnson Lane/ Station Road	Smithywood, Cowley Hill, Chapeltown
Former Tilcon Depot, Station Road, Ecclesfield	
City Centre	
Castlegate (Exchange Place)	In front of Midland Station
Castlegate (Commercial St/Broad St)	Land and Buildings, Hanover Way (Milton Street)
Egerton Street / Hanover Way	Moorfoot/NBD South
Footprint Tools & Synters	Pitsmoor Road/Chatham Street/Swinton Street
Furnival Square / Matilda Way	Sheaf Valley Digital Campus Site Phase 2, Pond Street
Hallam Lane	Spitalfields/ Brunswick Road
Upper Don Valley	
Airflow Site, Claywheels Lane	Livesey Street / Doncaster Lane
Beeleywood, Claywheels Lane	Neepsend Gas Works Tip
Cannon Brewery Rutland Road	Oakham Drive

Former Clifton Steelworks, Club Mill Road / Hoyland Road	Prospect Business Park, Carlisle Street East
Gas Holder Site, Neepsend Lane / Parkwood Road	Parkwood Springs Business Park
Herries Road, Herries Road South / Penistone Road North	Rawson Spring Road
Land at Claywheels Lane	Site of Doncasters, between Rivers Loxley and Don
Land at Club Mill Road / River Don A	Site of Hillfoot Steels, Pensitone Road North
Land at Wardsend Road	Stanley Tools, Rutland Road
Land at Wardsend Road North	United Cranes Site, Claywheels Lane
Lower Don Valley	
Barleywood Road	Lumley Street
Betafence, Sheffield Road	Next to Shepcote House, Shepcote Lane
Broadoaks	Nunnery Sidings - Dixons Site Phase 3 (Park and ride)
Broadlands, Lumley St	Nunnery Sidings (East)
Calor site, Shepcote Lane	Outokumpu, Shepcote Lane
Catley Road	Rear of Davy McKee, Prince of Wales Road
Faraday Rd /Trent Street	Ripon Street/Woodbourn Hill
Former Dr John Worrall School, Attercliffe	Sheffield Business Park Phase 2
Former ROM site, Meadowhall Road	Shepcote Lane/Europa Link
Former Sheffield Tipper's site, Sheffield Road	Spital Hill employment zone (Cherry Tree and informal space)
Former Tinsley Marshalling Yards, Europa Link	Upwell Street/Colliery Road
Huntsman's Gardens	Vantage Riverside
	Weedon St / Meadowhall Way ('River Don District')
Stocksbridge/Deepcar	
Ernest Thorpe's Lorry Park, Station Road, Deepcar	Station Road / Manchester Road, Deepcar

9.2

These employment areas were inspected in January 2013. A pro-forma for each site is attached at Appendix 3. The characteristics of each sub-area are briefly described below, alongside more detailed analyses of the existing and allocated sites within these areas.

Approach to Assessment

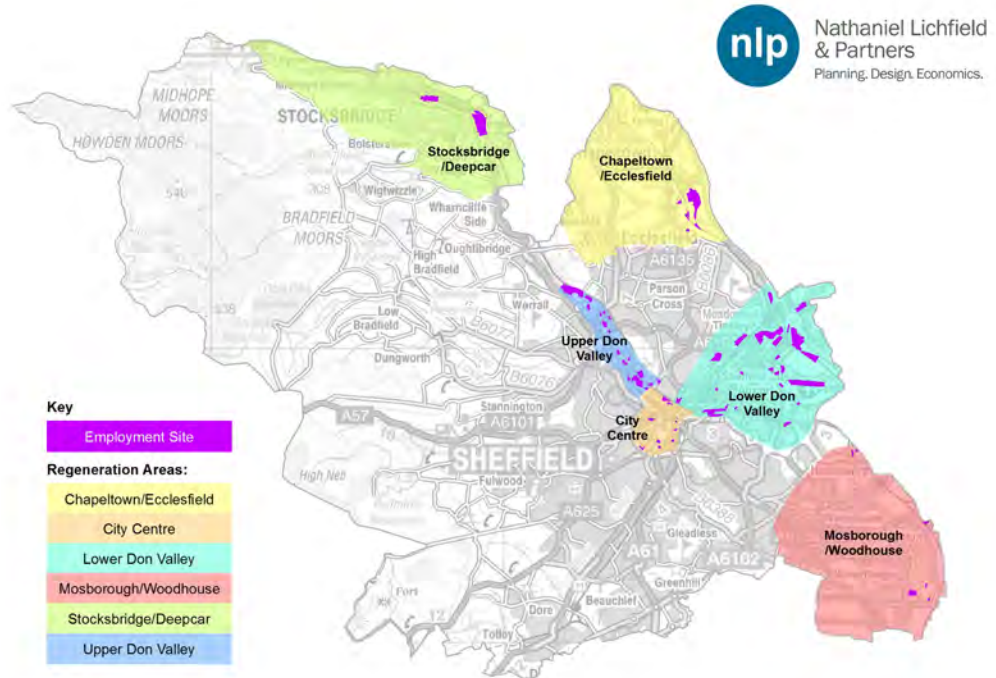
- 9.3 SCC provided a refined list of 81 sites to be assessed in detail. In January 2013 Guy Rusling Commercial Surveyors inspected all sites identified by the Council. These sites were assessed according to a range of market and sustainability criteria. An assessment was made of each site's suitability for employment use, against a substantial list of criteria reflecting the CLG Guidance on ELRs and Sheffield's own specific local circumstances. The locations of these sites and their site boundaries are illustrated in a series of plans provided in the pro-formas for each site at Appendix 3.
- 9.4 The initial site inspections identified 5 sites which offered no land for employment development or were otherwise currently fully utilised employment sites, offering no additional land to add to the supply in Sheffield. The removal of these from the assessment was agreed with SCC, leaving 76 sites for further analysis.
- 9.5 In determining the sites to be included in the ELR assessment process, a wide variety of data sources were explored, including both allocated and non-allocated sites without planning permission. This included:
- **Existing employment sites:** including 3 sites currently not allocated, but which contain operating employment uses.
 - **Committed/Allocated Employment Sites:** 67 sites including part developed and undeveloped sites, including those with extant planning permission for employment; and
 - **Potential Employment Sites:** 6 sites were not allocated within the adopted UDP for employment, otherwise vacant land allocated within the Core Strategy inside an area of transition, (where manufacturing should not expand within the Centre where it would detract away from regeneration). As a result these sites offer potential to be allocated for employment land uses.
- 9.6 The analysis was informed by a wide range of data sources ranging from flood risk to economic development benefits. In order to allow for the meaningful comparison of the allocated, and potential new sites, the assessed criteria were refined to 8 broad categories:
- 1 Local Road Access (including localised congestion)
 - 2 Proximity to urban areas and access to labour & services;
 - 3 Compatibility of adjoining uses (specifically relating to residential and other sensitive uses);
 - 4 Physical Characteristics (including topography, greenfield/PDL, shape and flood risk);
 - 5 Market attractiveness (quality and value);

- 6 Compliance with Planning Policy / Sustainability Issues (particularly the Development Plan, the NPPF, national wildlife designations and other known heritage or ecological constraints);
- 7 Infrastructure (including road constraints, car parking access, servicing required etc); and
- 8 Other barriers to development (including known landownership constraints, site remediation, site clearance required, presence of electricity cables over the site etc).

- 9.7 Each site was assessed against these criteria and, for each, given a ranking between 1 (poor) and 5 (best). This information and scoring for each site, along with photographs and comments to explain the score achieved, can be found on the Pro-Formas for each individual site contained in Appendix 3.
- 9.8 It should be emphasised that these categorisations are indicative to provide an estimation of the overall quality of the potential supply of sites. In addition, the types of uses for which each site was considered most suitable, and any constraints on delivering them, were noted.
- 9.9 Although these site 'scores' provide a reasonable indication of site quality and suitability, other considerations will also need to be taken into account in identifying a portfolio of sites such as their potential for a particular type of use and deliverability/timescale factors. The overall recommendations are not based solely on this numbering; other factors have also been taken into account. Nor does the numbering imply that the various criteria are of equal weight, thus the total score should not be used to compare sites against one another. In addition, not all businesses require a site which performs well on all these criteria, for example meeting rural/local needs.
- 9.10 The assessment provided and the recommended site portfolio in the following sections is presented on a "without prejudice" basis as evidence to reassess and inform Sheffield's current Core Strategy. It does not constitute Council policy. Future employment allocations will be determined through the formal consultation process as part of the City Polices and Sites document.

Breakdown of Sub-Areas in addition to Existing and Allocated sites.

Figure 9.1 Break Down of Six Sub-areas within Sheffield City



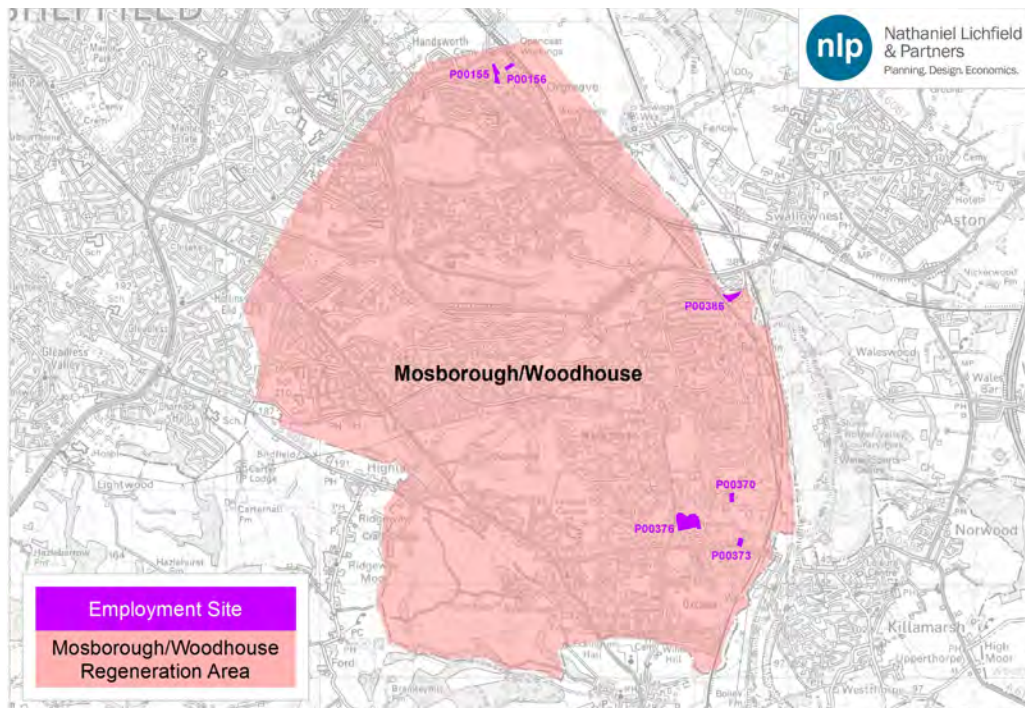
9.11 Figure 9.1 identifies the six sub-areas and indicates the location and number of sites within each.

9.12 The remainder of this section provides a summary of the locational characteristics of each of the sub areas, alongside a summary table which colour-codes the sites according to the study’s recommendations as follows:

- **Green** – Allocated employment sites recommended to retain their employment allocation;
- **Yellow** – Allocated employment sites recommended to be allocated for a mix of uses (alongside an indication of the recommended proportion of employment uses);
- **Orange** – Existing or fully developed allocated employment sites recommended to maintain employment protection; and
- **Red** – sites recommended for de-allocation.

SCC01: Mosborough /Woodhouse

Figure 9.2 Mosborough/Woodhouse Sub-Area



Overview

- 9.13 Mosborough and Woodhouse are located to the South East of the City Centre. Together, they form the most south-easterly part of Sheffield's urban area, between four and seven miles in distance from the City Centre, and have boundaries with the adjoining districts of North East Derbyshire and Rotherham to the South and East respectively.
- 9.14 The area was originally within Derbyshire, transferred to Sheffield in the 1960s. Since this time development of many Greenfield sites has taken place including the creation of industrial areas at Drakehouse, Holbrook and Oxclose. These catered for many new and relocated industrial and warehouse activities, providing local job opportunities. Nevertheless, despite local jobs being available, many residents have no choice but to travel to other parts of Sheffield, or even outside the City, to find jobs suited to their skills.
- 9.15 The Core Strategy recognises the need to provide local jobs for those who do not wish to travel far to work, highlighting the area as an outlying location suitable for manufacturing, distribution, warehousing and other non-office businesses. The Core Strategy states that a provision will be made for new jobs in the established industrial and business areas at the east side of Mosborough as well as the edge of Crystal Peaks District Centre (Policy CS13).

9.16 Mosborough/Woodhouse is accessed from the City Centre by two key routes, the A57 and A6135, as well as being serviced by the bus and Supertram. The area benefits from access to the strategic highway network including the A57. At peak times local road access can suffer from congestion and overcrowding on tram services³². The South Yorkshire Passenger Transport Executive (SYPTe) Transport Strategy highlights the A57 as a ‘congestion hotspot’ which will be targeted for a series of improvements to relieve congestion.

9.17 There is currently 8.88ha (gross) of employment land allocated over 6 assessed sites in this sub-area, mostly vacant land, including some greenfield land currently used for grazing. The sites surrounding areas are compatible for a number of employment uses including B1, B2 and B8. The infrastructure is of a good quality; however, the majority of sites would benefit from improved or through the addition of surrounding infrastructure, with most requiring on-site infrastructure development. Overall, the area has a moderate level of market attractiveness for a number of uses. Most are likely to be attractive to the local market only.

Table 9.2 Allocated Employment Sites Appraised in Mosborough/Woodhouse Sub-area

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00155: Former Asda site Orgreave Place 1	Allocated in a General Industry without Special industries	1.16 (1.04)	24	Retain Employment Allocation
P00156: Scaffold Yard, Orgreave Place	Allocated in a General Industry without Special industries	0.5 (0.48)	23	Retain Employment Allocation
P00370: New Street, Longacre Way	Allocated in a General Industry area with special industries	1.4 (1.26)	22	Retain Employment Allocation
P00373: Meadowbrook Park	Allocated in a General Industry area with special industries	0.6 (0.54)	25	Retain Employment Allocation
P00376: Mosborough Wood Business Park	Allocated in a General Industry area with special industries	4.16 (4.16)	24	Retain Employment Allocation
P00386: Rotherham Road, Beighton	Allocated in a Business Area	1.06 (0.85)	22	Retain Employment Allocation

Employment Area Summary

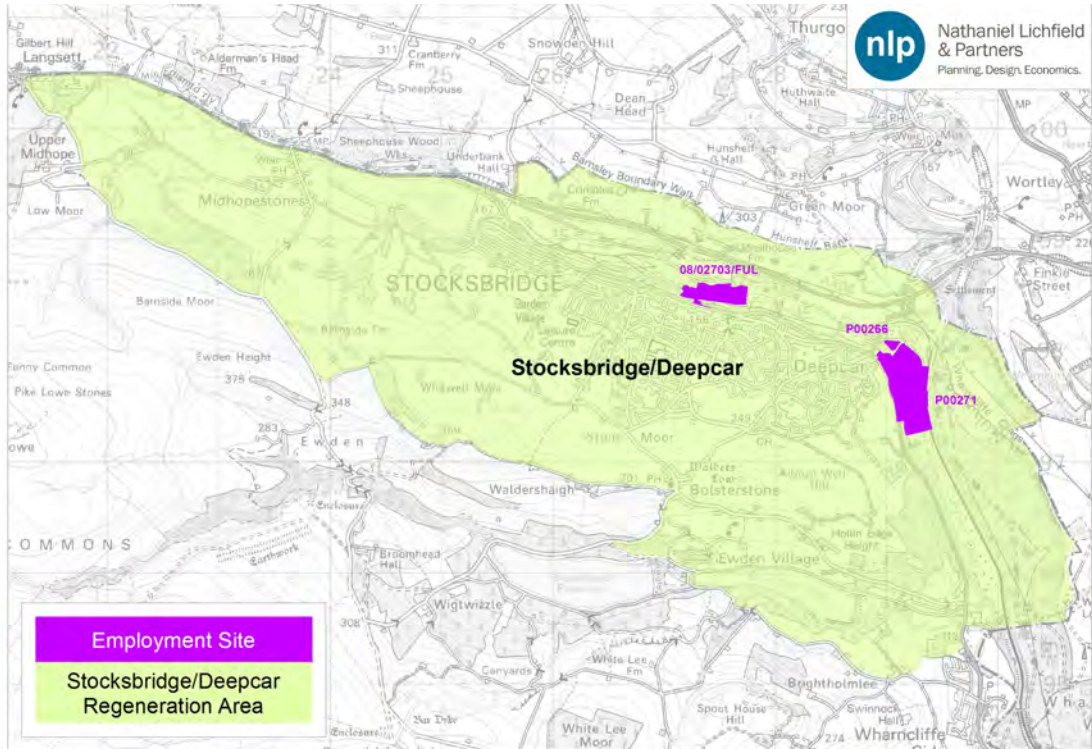
9.18 **The six assessed sites in Mosborough/Woodhouse provide approximately of 8.33ha (net) of developable employment land. It is recommended that the six sites within are retained as employment site allocations. These sites are considered to continue to offer**

³² Sheffield Development Framework - Core Strategy (March 2009)

appropriate opportunities for employment development. Any constraints could be managed and mitigated through the planning process.

SCC02: Stocksbridge/ Deepcar

Figure 9.3 Stocksbridge/Deepcar Sub-area



Overview

- 9.19 The Stocksbridge/Deepcar sub-area is located approximately 8 miles north west of Sheffield City Centre and is somewhat isolated from the rest of Sheffield. This area nonetheless makes an important contribution to employment land supply in Sheffield meeting a primary indigenous need.
- 9.20 Historically, the area has been intensively developed and Stocksbridge/Deepcar grew around heavy industry. The subsequent decline in these industries has seen a demand for the redevelopment of many parts of the area areas for housing. Many industrial businesses have since closed; Stocksbridge in particular has now taken on more of a commuter role.
- 9.21 The area is defined as a peripheral area in the Core Strategy. The Core Strategy states that new development will take place on previously developed land, providing local jobs on redeveloped sites reducing the need to travel to work. Under Policy CS5, Stocksbridge/Deepcar is highlighted as a location suitable for Manufacturing, Distribution / Warehousing and other non-office Businesses. Policy CS33 outlines that

industrial land identified in Stocksbridge/Deepcar which is surplus to operational requirements that could still provide employment and business opportunities for local people and should be safeguarded for business development.

- 9.22 The Core Strategy does not, however, expect that the overall total number of jobs in Stocksbridge will grow. Increasing demand for housing within the area is putting pressure on employment land and the Core Strategy sees its role growing as a commuter area.
- 9.23 The area is served by several main roads including the A616 (T) to M1 Junction 35A, the B6088 and the A6102. In terms of congestion, the Hillsborough area causes problems for those travelling to and from Stocksbridge at peak times.
- 9.24 The area is served by medium frequency bus routes from both Sheffield and Barnsley. The Woodhead Railway line runs from Deepcar through to Nunnery Square joining with the Midland Line. There is no passenger rail service along the Woodhead Line and only freight services operate from Rotherham to Corus Engineering Steel's Stocksbridge Works.
- 9.25 Overall, Stocksbridge/Deepcar currently has 11.7ha (gross) of allocated employment land over the 3 assessed sites. The allocated employment areas are generally large sites of previously developed land. Infrastructure is of a moderate quality. Most of the occupiers are local businesses, and wider market demand is generally poor, with any market interest generally indigenous. This employment area is evidently a less popular location for outside investment and there has been recent pressure for housing development on the allocated employment land.

Table 9.3 Allocated Employment Site Appraised in Stocksbridge/Deepcar

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
New Site: Corus And Outokumpu Works, Ford Lane / Manchester Road / Hunshelf Road	Allocated in a General Industry Area with Special industries	9.37 (7.965)	13	Allocate for Mixed Use (12.5% employment uses)
P00266: Ernest Thorpe's Lorry Park, Station Road, Deepcar	Allocated in a Fringe Industry and Business Area	0.95 (0.855)	16	Retain Employment Allocation
P00271: Station Road / Manchester Road, Deepcar	Allocated in a Fringe Industry and Business Area	1.38 (1.38)	16	De-allocate

Employment Area Summary

- 9.26 **The three currently allocated sites in the Stocksbridge/Deepcar could provide around 10.2ha (net) of developable employment land. It is recommended that the Ernest Thorpe's Lorry Park (P00266) should be**

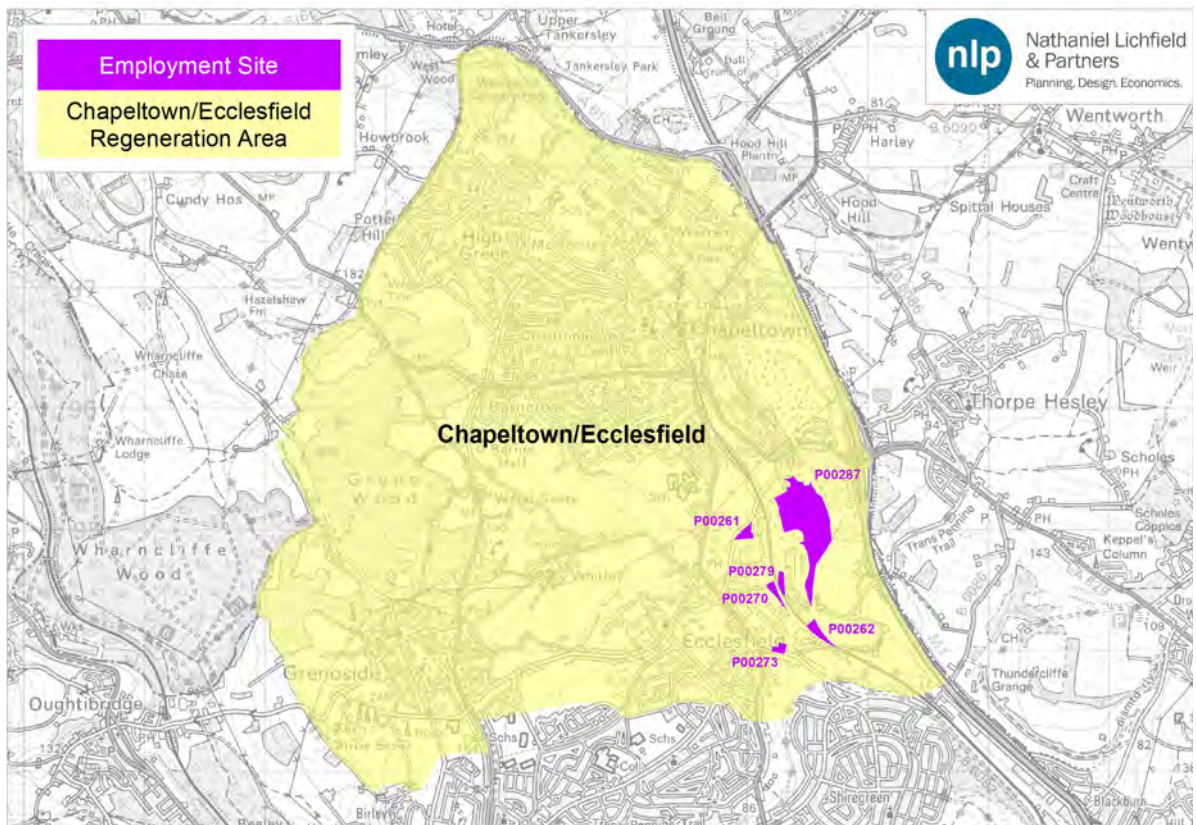
retained as an employment allocation. The Corus and Outokumpu Works is recommended to be allocated for mixed use, retaining an estimated 1ha for employment uses in line with the planning permission for mixed use (Ref: 08/02703/FUL), which includes B1 Office Use.

9.27 It is recommended that Station Road/ Manchester Road (P00271) should be deallocated from employment use. This site is highly constrained and the prospects of the site coming forward for employment uses is unlikely. The site currently has detailed planning permission for 405 dwellings, including an access road and bridge, as outlined in the City Polices and Sites document, thus it is deemed appropriate to de-allocate the site.

9.28 Out of the three sites assessed therefore, this adjustment to the portfolio would leave around 1.85ha of employment land to be allocated in the Stocksbridge/ Deepcar sub-area.

SCC03: Chapeltown / Ecclesfield

Figure 9.4 Chapeltown/Ecclesfield Sub-Area



Overview

9.29 Chapeltown and Ecclesfield are rural settlements located north of Sheffield City Centre, bordering on open countryside and bounded by the

M1 to the east. The area comprises of five distinctive communities: Chapeltown, High Green, Burncross, Ecclesfield and Grenoside. It is an area of mixed farmland, parks, housing and industrial locations.

- 9.30 The area is highlighted within the Core Strategy as being a key area for Manufacturing, Distribution/Warehousing and Non-Office business use area under Policy CS5. Chapeltown District Centre is identified under Policy CS3 as a location where smaller-scale office development will be deemed suitable.
- 9.31 The Core Strategy goes on to state that business and industrial development at Thorncliffe, Ecclesfield Common and Smithywood should be focused on brownfield land. These existing industrial estates have recently accommodated new development, and the construction of the first phase of development for new general industrial and warehousing units has taken place.
- 9.32 Access to these areas is relatively good, particularly to the strategic network including the M1 Junction Penistone Road (A61) to the West. The area is served by several main roads including the A6135 Sheffield to Barnsley via Chapeltown, the A629 Chapeltown to Wortley, the A629 Chapeltown to Rotherham via the M1 Junction 35, the Chapeltown to High Green local route (Loundside/ Lane End/ Mortomley Lane/ Wortley Road) and the A61 Hillsborough to M1 junction 36. Congestion is still a major issue, however, especially at peak times.
- 9.33 The area is served by high and medium frequency bus services serving Ecclesfield, Grenoside, Chapeltown and High Green. There is also a train station in Chapeltown, providing frequent train services into Sheffield.
- 9.34 Overall Chapeltown/Ecclesfield currently has 38.4 ha gross (34.94 ha net) allocated employment land over 6 assessed sites; the majority of which relates to SCC03/287 at Smithywood. The majority of the allocated sites are vacant or derelict land and due to their peripheral location, they are generally considered to have limited market attraction.

Table 9.4 Allocated Employment Sites Appraised within Chapeltown/Ecclesfield

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00261: Adjacent Former Hydra Tools, Nether Lane, Ecclesfield	Allocated in a General Industry area with Special Industries	1.18 (1.062)	25	Retain Employment Allocation
P00262: Adjacent to disused railway Butterthwaite Lane	Allocated in a General Industry area with Special Industries	1.48(1.33)	9	De-allocate
P00270: Former Petrol Depot, Johnson Lane/ Station Road	Allocated in a General Industry area with Special Industries	1.63(0.978)	13	Retain Employment Allocation
P00273: G Fishers Transport Yard, Green Lane, Ecclesfield	Allocated in a General Industry area with Special Industries	0.81(0)	18	Retain Employment Protection
P00279: Next to Arthur Lee Works, Loicher Lane, Ecclesfield	Allocated in a General Industry area with Special Industries	0.91(0.77)	17	Retain Employment Allocation
P00287: Smithywood, Cowley Hill, Chapeltown	Allocated in a General Industry area without Special Industries and proposed Business and Industrial site	32.42(30.799)	33	Retain Employment Allocation

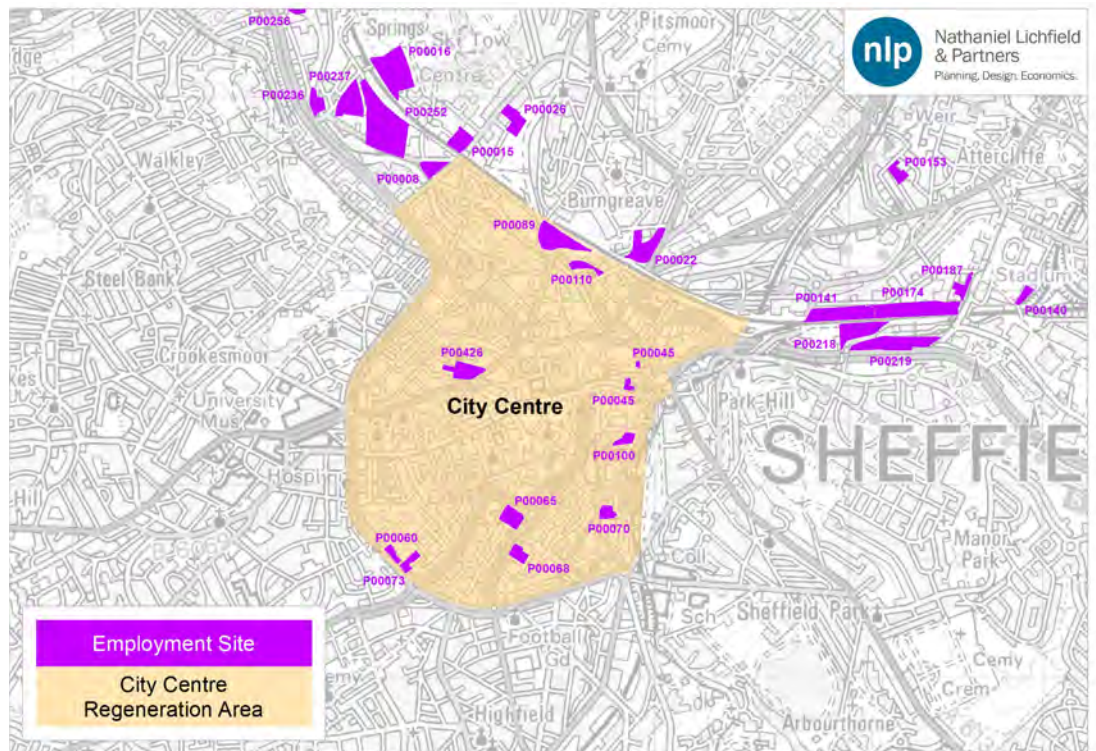
Employment Area Summary

9.35 **The Chapeltown/Ecclesfield Sub-area has an estimated 35ha (net) of developable employment land. Of the sites assessed, it is recommended that four retained their employment allocations, which is equivalent to 33.6ha (net). The G Fishers Transport Yard, Green Lane, Ecclesfield (P00273), which has no current available developable land, is recommended to be retain its protection for employment use although no developable land remains.**

9.36 **It is recommended that the site adjacent to the disused railway at Butterthwaite Lane (P00262) should be de-allocated. The site is a heavily constrained, land-locked greenfield site, which has very limited market attractiveness. These constraints are considered to outweigh any potential development opportunities and it is considered unlikely that any employment development would be suited to the location. The site's semi-isolated nature and poor accessibility offers little prospect of the site coming forward for the foreseeable future.**

SCC04: City Centre

Figure 9.5 City Centre Sub-area



Overview

- 9.37 The City Centre is defined as the area within the Inner Relief Road, together with the Kelham/Neepsend areas.
- 9.38 The Centre is recognised as a key economic driver for Sheffield City as well as the wider Sheffield City Region. Whilst Sheffield has historically been characterised as a heavy manufacturing city, in recent times the City Centre has undergone a transformation. Since the 2000 City Centre Masterplan, significant regeneration programmes have been undertaken across the City Centre. Employment in Sheffield is now concentrated in the distribution, hotel, restaurant and public services sectors of the economy, emerging from being a primarily manufacturing employer to a predominantly service employer.
- 9.39 The Core Strategy recognises the changes in employment within Sheffield and states that the City Centre is no longer suitable for B2 manufacturing purposes. Further office development is recognised as being crucial for the continued transformation of the City Centre and is prioritised under Policy CS3 which sets a target of focussing at least 65% of the City’s total office development within the City Centre or at its edge.

- 9.40 Access to Sheffield City Centre is very good. It benefits from a strong network of strategic routes converging on the City Centre, including strategic road connections from the A6109 to M1 Junction 34, and the A630 (Sheffield Park Way) link towards M1 Junction 33.
- 9.41 Sheffield is also highly accessible by sustainable means, and has a national reputation for its public transport. The train station provides regular and direct services to London (and other surrounding cities including Derby, Nottingham, Leeds and Doncaster) and has recently been refurbished. It is now set within high quality public realm on both sides. The three-line tram network provides a high frequency link between Sheffield City Centre and Meadowhall, Malin Bridge / Middlewood and Herdings Park / Halfway. Trains and trams are supplemented by a selection of high frequency bus services. It is considered that the City Centre's locational advantages can be used to attract new businesses.
- 9.42 Overall vacancy rates within the City Centre are moderate, although there are a number of vacant allocated employment sites around the City Centre, some of which are utilised as car parks. The market attractiveness for the employment sites within the City Centre is moderate, which may explain why certain sites are not coming forward for development. Nonetheless, they still offer excellent opportunities for employment development.
- 9.43 The City Centre is also an attractive location for other uses such as retail, leisure, culture and housing. In the current economic climate, employment land is coming under pressure for higher value uses such as residential.
- 9.44 Overall, the City Centre currently has 6.9 ha of allocated employment land and 2.1 ha of currently occupied land across 11 sites detailed in the table below. The City Centre is a key area of economic growth for both Sheffield and the wider City Region. Over the past decade, large-scale redevelopment has taken place, which has slowed in recent years due to the economic downturn. There remains, however, an acute shortage of Grade-A office accommodation within the City Centre.

Table 9.5 Allocated Employment Sites Appraised within the City Centre

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00045: Castlegate (Exchange Place)	Allocated in a Business Area	0.24(0.24)	27	Retain Employment Allocation
P00045/1: Castlegate (Commercial St/Broad St)	Allocated in a Business Area	0.2(0.18)	27	Retain Employment Allocation
P00060: Egerton Street / Hanover Way	Existing employment use	0.83(0.0)	23	Retain Employment Protection
P00065: Furnival Square / Matilda Way	Allocated Core Strategy Priority office area (now fully developed)	0.96(0.0)	26	Retain Employment Protection
P00068: Hallam Lane	Allocated in a Fringe Industrial and Business area (now fully developed)	0.616(0.0)	21	Retain Employment Protection
P00070: In front of Midland Station	Allocated in a Business Area	0.6(0.54)	24	Retain Employment Allocation
P00073: Land and Buildings, Hanover Way (Milton Street)	Allocated in a Fringe Industrial and Business area (Vacant land)	0.51(0.459)	25	Allocate for Mixed Use (50% employment uses)
P00089: Pitsmoor Road/Chatham Street/Swinton Street	Allocated in a General Industry Area without special Industries (Vacant Land)	2.582(1.8)	16	Allocate for Mixed Use (25% employment uses)
P00100: Sheaf Valley Digital Campus Site Phase 2, Pond Street	Allocated in a business institution: Leisure Area (Vacant Land)	0.39(0.35)	27	Retain Employment Allocation
P00110: Spitalfields/ Brunswick Road	Allocated General Industry Area without special Industries (Partly Vacant)	0.77(0.693)	28	Retain Employment Allocation
P00426: Footprint Tools & Synters	Existing employment use	1.3 (0)	20	Retain Employment Protection

Employment Area Summary

9.45

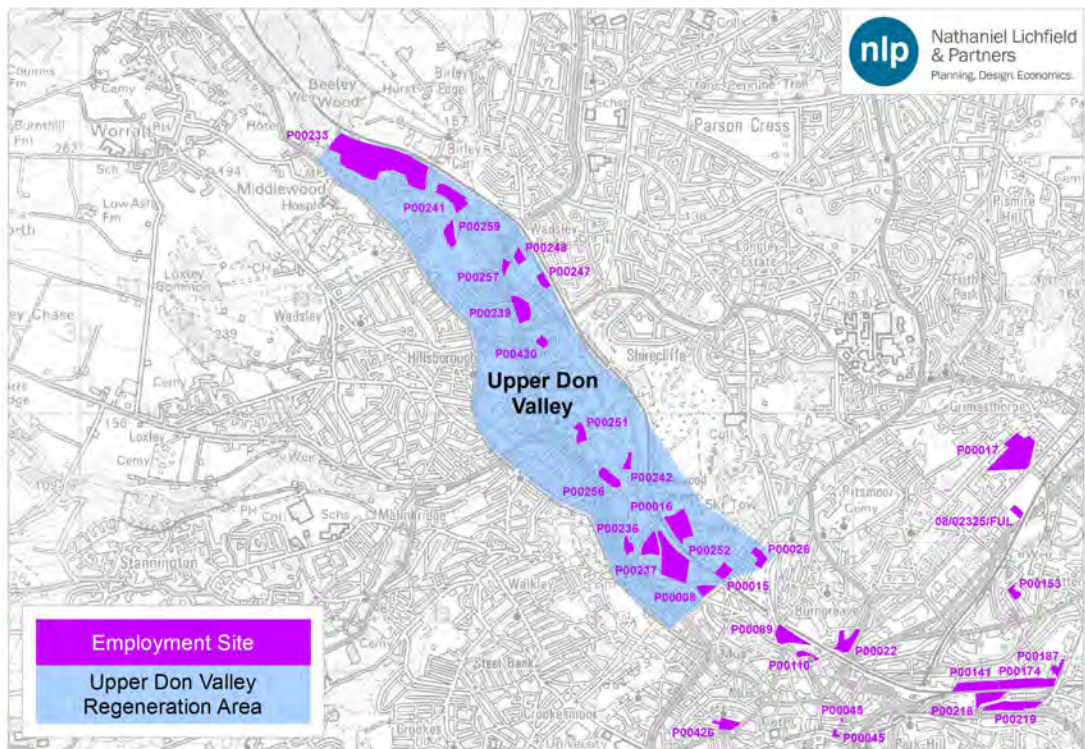
The City Centre currently has an estimated 4.3ha (net) of developable land for employment uses. Of the 11 City Centre sites assessed, it is recommended that five retain their employment allocations to help protect them from other higher value uses and particularly redevelopment for housing.

9.46 **It is recommended that four sites retain employment protection, including both existing sites (P00060 and P00426) and (fully developed) allocated sites P00065 and P00068. Although all four sites currently have zero net developable land, they offer an opportunity for long term future redevelopment within the City Centre.**

9.47 **The remaining two sites are recommended to be allocated for a mix of uses with varying proportions of employment land. These include Land and Buildings, Hanover Way, Milton Street (P00073) and Pitsmoor Road/Chatham Street/Swinton Street (P00089). Together, these could provide an estimated 0.68ha employment land to the overall City Centre Supply.**

SCC05: Upper Don Valley

Figure 9.6 Upper Don Valley Sub-Area



Overview

9.48 The Upper Don Valley sub-area is located to the North West of Sheffield City Centre. It follows the route of the River Don, extending from the Claywheels Lane industrial estate in the north, to Rutland Road in the south. It includes the land generally lying alongside Penistone Road (A61) and to the west of the railway line and Parkwood Springs in the east. Much of the area is industrial in character.

9.49 The Upper Don Valley is a large area, which has traditionally been a key area for employment in the City. It is particularly notably for steel manufacturing which despite substantial restructuring in recent years is

likely to continue to play an important role in the future of Sheffield's economy. The area has suffered in the past from decline both physically and economically.

- 9.50 The Upper Don Valley is identified as a strategic employment area in the Core Strategy. Its proximity to the City Centre enables B2 and B8 developments no longer suited to a central location to relocate within a reasonable distance. Policy CS5 of the Core Strategy recognises the Upper Don Valley as an area of opportunity for manufacturing, distribution/warehousing and other non-office business development.
- 9.51 The Upper Don Valley Regeneration Strategy³³ aims to support specialist material technologies and advanced manufacturing, whilst also developing a broader and more diverse mix of uses across the Upper Don Valley. It is also recognised that the quality of the environment and, in particular, its industrial character, will need to improve in order for it to attract inward investment.
- 9.52 Access to the Upper Don Valley is relatively good. The main strategic road, the A61 Penistone Road, links directly to the City Centre. However, it is recognised there is a need to upgrade this key route, which will further support enhanced the regeneration of the Upper Don Valley, alleviating congestion and supporting bus services to the City Centre.
- 9.53 Overall, the Upper Don Valley has 38.2ha (gross) of allocated employment land, over 17 sites as outlined in the table below. The Upper Don Valley is home to some of Sheffield's most well known firms. However, alongside many of these established companies there are significant areas of vacant/derelict land and buildings. The area is considered by many stakeholders to be underperforming as a business location. There is, however, a relatively low level of vacancy in comparison to other areas north of the City Centre. The area retains a high level of infrastructure (suited for an industrial-based market), making overall market attractiveness in the area relatively positive. Should future regeneration and environmental improvements come forward, this should improve further.
- 9.54 The 2007 Upper Don Valley background report³⁴ outlines that at that time, there was an increase in enquiries for residential development in the area, potentially in relation to vacant land. Given the changed nature of the housing market since that time, it is considered that some of these competing pressures may have reduced, but as the housing market recovers, they may return. Nonetheless, it is noted that the 2013 SHLAA identifies site P00026 as an opportunity site that is deliverable and developable for housing over the plan period.

³³ Upper Don Valley Physical Regeneration Strategy (October 2006)

³⁴ Upper Don Valley Background Report (2007)

Table 9.5 Allocated Employment Sites Appraised in the Upper Don Valley

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00008: Cannon Brewery Rutland Road	Allocated in a General Industry Area with Special Industries	0.8(0.72)	20	Retain Employment Allocation
P00015: Oakham Drive/ Rutland Road	Allocated in Core Strategy	1.07(0.91)	21	Retain Employment Allocation
P00016: Parkwood Springs Business Park	Allocated in a Business Area	3.38(2.54)	13	Retain Employment Allocation
P00026: Stanley Tools, Rutland Road	Allocated in a Fringe Industry and Business Area	1.1(0.88)	15	Allocate for Mixed Use (22.7% employment uses)
P00233: Airflow Site, Claywheels Lane	Allocated in a General industry Area with special industries	2.55(2.00)	16	Retain Employment Allocation
P00236: Former Clifton Steelworks, Club Mill Road / Hoyland Road	Allocated in a General industry Area with special industries	0.78(0.702)	21	Retain Employment Allocation
P00237: Gas Holder Site, Neepsend Lane / Parkwood Road	Allocated in a General industry Area with special industries	0.85(0.723)	17	Retain Employment Allocation
P00239: Herries Road, Herries Road South / Penistone Road North	Allocated in a Fringe Industrial and Business Area	2.25(2.025)	23	Retain Employment Allocation
P00242: Land at Club Mill Road / River Don A	Allocated in a General industry Area with special industries	0.63(0.535)	18	Retain Employment Allocation
P00247: Land at Wardsend Road	Allocated in a General industry Area without special industries	0.8(0.48)	15	Retain Employment Allocation
P00248: Land at Wardsend Road North	Allocated in a General industry Area without special industries	0.77(0.27)	13	Retain Employment Allocation
P00251: Livesey Street / Doncaster Lane	Allocated in a General industry Area with special industries	1.21(1.028)	22	Retain Employment Allocation
P00252: Neepsend Gas Works Tip	Allocated in a General industry Area with special industries	5.5(4.68)	18	Retain Employment Allocation
P00256: Site of Doncasters, between Rivers Loxley and Don	Allocated in a General industry Area with special industries	1.6(1.44)	16	Retain Employment Allocation

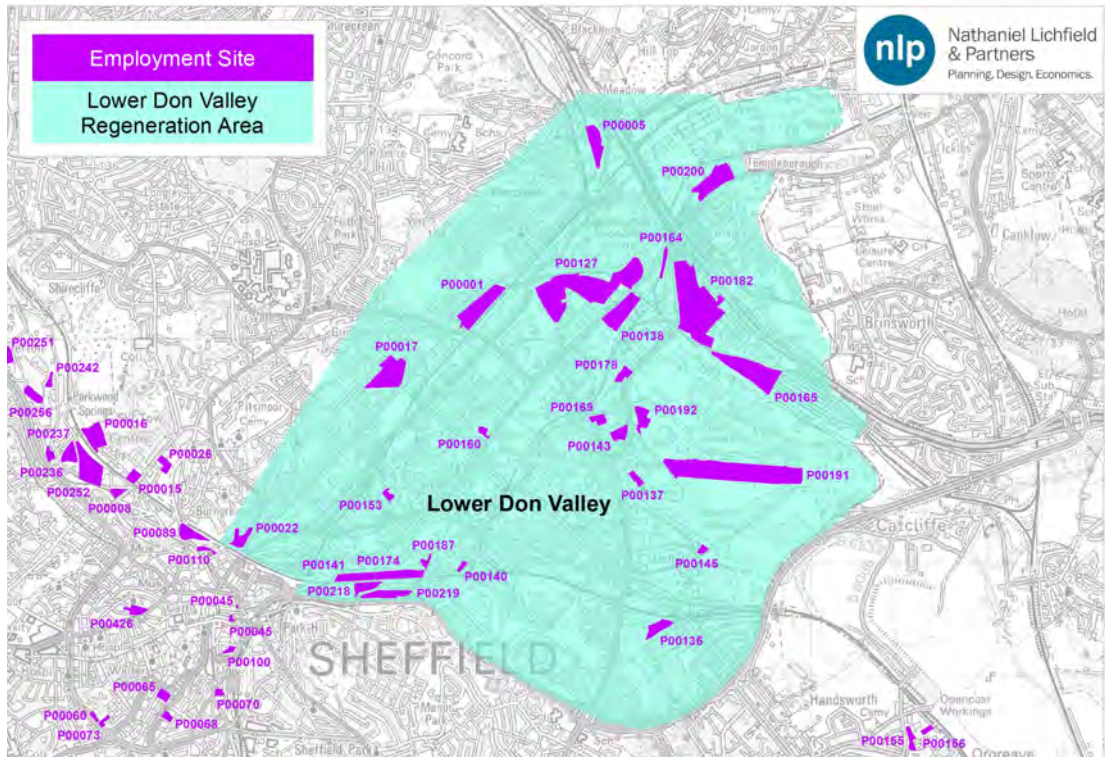
Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00257: Site of Hillfoot Steels, Pensitone Road North	Allocated in a General industry Area without special industries	0.58(0.522)	21	Retain Employment Allocation
P00258: Beeleywood, Claywheels Lane	Allocated in Core Strategy	13.34 (8.0)	19	Retain Employment Allocation
P00259: United Cranes Site, Claywheels Lane	Allocated in a General industry Area with special industries (now fully developed)	1.50(0)	20	Retain Employment Protection
P00430: Rawson Spring Road	Allocated in a General industry Area without special industries	0.63(0.56)	22	Retain Employment Allocation

Employment Area Summary

- 9.55 **The Upper Don Valley currently has an estimated 27.4 ha (net) of developable employment land. It is recommended that 16 of the sites assessed retain their employment allocations, with Stanley Tools, Rutland Road (P00026) recommended to allocation for mixed use. This site had a previous application for mixed use, including residential and offices, granted in 2008, which has since expired.**
- 9.56 **The constraints on the site, such as its sloping topography, lends itself more favourably to residential; however, it would also be suitable for some employment uses. Therefore, it is recommended that SCC should consider re-designating the site as a mixed use allocation to include around 0.2ha of employment land. With regards to the fully developed United Cranes Site, Claywheels Lane (P00259), it should retain its current employment land protection.**

Lower Don Valley

Figure 9.7 Lower Don Valley Sub-area



Overview

- 9.57 The Lower Don Valley is located to the north eastern side of Sheffield City Centre. The sub-area includes areas such as Attercliffe, Brightside, Darnall and the Tinsley area which borders Rotherham Borough and the Advance Manufacturing Park [AMP] to the east and south.
- 9.58 The Lower Don Valley area has historically been Sheffield’s traditional manufacturing heart, particularly for the steel industry. Although the manufacturing industry has declined over the years and the steel industry is now much smaller in size today, it still plays a very important role for the local economy. The Lower Don Valley is now home to many new sectors of employment including retail and leisure uses centred around Meadowhall and Sheffield Arena.
- 9.59 The Core Strategy identifies the Lower Don Valley as a strategic employment location which will complement the City Centre. The Lower Don Valley is seen as a primary location for a mixture of employment uses including manufacturing, distribution/warehousing and other non-office businesses as identified in Policy CS5. It is also highlighted as a location for major leisure development not appropriate for the City Centre under Policy CS15.
- 9.60 The vision for the Lower Don Valley is for a vibrant mix of community, leisure, retail, office and business uses capitalising on its unique and

authentic industrial heritage. The Lower Don Valley masterplan aims to attract new investment to the Lower Don Valley to meet the challenges of a new economy, by continuing to attract and develop successful, competitive businesses. It aims to safeguard viable existing businesses, whilst attracting new companies in the identified growth sectors.

- 9.61 The Lower Don Valley is one of the most accessible and strategically located areas of Sheffield. The M1 cuts across the northern edge of the area and enables it to connect with the rest of the City and beyond. Sheffield Parkway also runs to the south, providing access from the M1 to the City Centre.
- 9.62 As well as having excellent road access, the public transport links from the City Centre are generally very good. The Supertram route to Meadowhall follows a route through the Valley to the transport interchange at Meadowhall, which links to the a park-and-ride facility as well as a wide range of converging bus routes and the main-line railway station. However, public transport commuter routes from some areas (such as Mosborough /Woodhouse) require improvements.
- 9.63 The Lower Don Valley has by far the greatest supply of allocated employment land, of around 127ha (gross), over 26 sites as outlined in the table below. The Lower Don Valley benefits from relatively high levels of market attractiveness and remains a prime location for many businesses. However, despite this market attraction, there are still many under-utilised or vacant derelict sites, which could offer opportunities for a wide range of employment uses. It should, however, be noted that some sites are at risk of flooding, whilst other sites have land remediation issues associated with their industrial past.

Table 9.6 Allocated Employment Sites Appraised in the Lower Don Valley

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00001: Upwell Street/Colliery Road	Allocated in a General industry Area with special industries	6.26(5.6)	30	Retain Employment Allocation
P00005: Former ROM site, Meadowhall Road	Allocated in a Business Institution: Leisure Area	4.4(0.44)	26	Retain Employment Allocation
P00017: Prospect Business Park, Carlisle Street East	Existing employment use (now fully developed)	6.5(0.00)	15	Retain Employment Protection
P00022: Spital Hill employment zone (Cherry Tree and informal space)	Allocated in a Fringe Industry and Business Area	1.2(0.6)	15	De-allocate

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00127: Weedon St / Meadowhall Way ('River Don District')	Allocated in Fringe Industrial and Business area	25(22.5)	31	Allocate for Mixed Use (60% employment uses)
P00136: Rear of Davy McKee, Prince of Wales Road	Allocated in a General industry Area without special industries	2.1(1.4)	16	Retain Employment Allocation
P00137: Barleywood Road	Allocated in a General Industry Area with special industries	0.9(0.6)	17	Retain Employment Allocation
P00138: Betafence, Sheffield Road	Allocated in a Fringe Industry and Business Area	5.15(4.12)	28	Allocate for Mixed Use (70% employment uses)
P00140: Broadoaks	Allocated in a Mixed Use Area	0.6(0.36)	18	Retain Employment Allocation
P00141: Broadlands, Lumley St	Existing employment use, Allocated in a General Industry Area with special industries	2.5 (0.75)	23	Retain Employment Allocation
P00143: Calor site, Shepcote Lane	Allocated in a Fringe Industry and Business Area	1.5(1.2)	24	Retain Employment Allocation
P00145: Catley Road	Allocated in a General Industry Area with special industries	0.6(0.48)	18	Retain Employment Allocation
P00153: Faraday Rd /Trent Street	Allocated in a General Industry Area without Special Industries	0.78(0.7)	19	Retain Employment Allocation
P00160: Former Dr John Worrall School, Attercliffe	Allocated in a Fringe Industry and Business area	0.7(0.59)	21	Retain Employment Allocation
P00164: Former Sheffield Tipper's site, Sheffield Road	Allocated in a Business Area	0.93(0.47)	23	Retain Employment Allocation
P00165: Former Tinsley Marshalling Yards, Europa Link	Allocated in a General Industry Area with special industries	8.8(7.92)	34	Retain Employment Allocation
P00169: Huntsman's Gardens	Allocated in a Fringe Industrial and Business area	0.8(0.64)	20	Retain Employment Allocation

Site Reference and Name	Site Status and Planning Designation	Gross Site area, in hectares (Net area in brackets)	Total Ranking	Recommendations
P00174: Lumley Street	Allocated in a General Industry Area with special industries	3.38(2.7)	22	Retain Employment Allocation
P00178: Next to Shepcote House, Shepcote Lane	Allocated in a Business Institution: Leisure Area	1.3(1.1)	24	Retain Employment Allocation
P00182: Outokumpu, Shepcote Lane	Allocated in a General Industry Area with special industries	19.92(17.92)	29	Retain Employment Allocation
P00187: Ripon Street/Woodbourn Hill	Allocated in a General Industry Area with special industries	0.7(0.53)	20	Retain Employment Allocation
P00191: Sheffield Business Park Phase 2	Allocated in a Fringe Industrial and Business area	21.52(21.52)	33	Retain Employment Allocation
P00192: Shepcote Lane/Europa Link	Allocated in a Fringe Industrial and Business area	2(1.8)	28	Retain Employment Allocation
P00200: Vantage Riverside	Allocated in a Fringe Industrial and Business area	5.54(4)	26	Retain Employment Allocation
P00218: Nunnery Sidings - Dixons Site Phase 3 (Park and ride)	Allocated in a Fringe Industrial and Business area	1.83(1.83)	24	De-allocate
P00219: Nunnery Sidings (East)	Allocated in a Fringe Industrial and Business area	1.38(0.75)	20	Retain Employment Allocation

Employment Area Summary

9.64

The Lower Don Valley currently has an estimated 100ha (net) of developable employment land. The Lower Don Valley is a focus for employment and has high demand for employment land. Thus, it is essential to retain as much employment land as possible. 21 sites are recommended to retain their employment allocation as they continue to offer suitable opportunities for employment development. Likewise, the existing employment site at Prospect Business Park, Carlisle Street East is recommended to retain its employment protection despite the fact that no land remains to be developed in order to help maintain future employment land stock in the Lower Don Valley. A further two sites have been recommended to be allocated for mixed use. These include Weedon St/Meadowhall Way ('River Don District') and Betafence, Sheffield Road.

9.65 **It would not be reasonable to expect that a large site such as Weedon St / Meadowhall Way ('River Don District') would come forward solely for employment uses. Whilst this site would be appropriate for employment-led development, it is considered that some high value uses should be included to help bring the site forward. It is considered that 13.5ha (net) of this site should be allocated for employment uses. It is also recommended that the Council take a similar mixed use approach to the Betafence, Sheffield Road site, to allow a flexible approach to be taken on bringing this site forward, with an estimated 2.8ha of employment land allocated as a result.**

9.66 **There are two sites recommended for de-allocation. The first of these, Spital Hill employment zone (Cherry Tree and informal space), is not one of the lowest scoring sites; however, its poor site characteristics and market attractiveness make this site likely to be undeliverable for employment uses. It is considered that it would be more suited to residential uses and realistically, it has little prospect of coming forward for employment, and therefore, should be removed from the portfolio. The second site, Nunnery Sidings - Dixons Site Phase 3 (Park and ride), could accommodate employment uses; however, its current use as a park and ride provides a key role for the area and therefore any future re-designation should reflect this.**

Conclusions

9.67 This section has assessed in detail the characteristics and quality of provision of 70 existing, allocated and committed employment sites within six regeneration areas across the City. The additional 6 potential sites are assessed in further detail in Section 10.0.

9.68 The assessment resulted in recommendations as to whether the sites should retain an employment allocation, or protection for employment uses; be allocated for a mix of uses (with an element of employment land); or be de-allocated from the portfolio to inform future employment allocations across the City,

9.69 Of the 70 sites assessed, a total of 53 are recommended to retain their employment allocation; 7 existing and allocated employment sites are recommended to retain policy protection for employment uses; 6 sites are recommended to maintain an element of employment land alongside a mix of other uses; and 4 sites are identified for de-allocation from the employment land portfolio.

9.70 These recommendations are considered in further detail in Section 10.0.

10.0 Demand/Supply Balance

Context

10.1 This section draws together the earlier forecasts of future employment space needs for both B and Non B-Class uses, as well as the estimates of available development land and committed supply identified in the preceding sections. This then enables this study to identify the balance of demand and supply of employment space. This analysis will enable the need for any further allocations of employment space, or the removal of any surpluses, to be identified in both quantitative and qualitative terms.

Quantitative Balance

10.2 As noted in Section 8.0, it is considered that to meet Sheffield's needs in isolation, around 305 ha of employment land should be provided between 2013 and 2031, of which almost half (150ha) should be for B1c/B2; 63ha for B1a/b, and a further 92ha for B8 warehousing. This is in line with the requirements identified under the Past Take Up Scenario and equates to an annual employment land requirement of 17 ha per year over the 18 year plan period, or a five year requirement for 85 ha.

10.3 The land supply required to meet this need will come from the following sources:

- a) Allocated employment land without planning permission;
- b) Undeveloped plots within industrial estates without planning permission;
- c) Employment space with extant planning permission; and
- d) Windfall sites, underused employment sites and the intensification of existing employment premises. The amount of land likely to come forward from such sources is not clear, nor is it sufficiently certain to come forward to justify it being quantified as part of the demand/supply balance.

Available Land vs. Demand

10.4 Table 10.1 provides a summary of indicative demand by market area, as identified in the preceding sections, as well as an overview of available employment land. It should be noted that the previous take up rates, which have formed one aspect of assessing future demand, have only been recorded on a City-wide basis rather than by sub-areas of the City. Consequently it is not possible to provide a quantitative analysis of potential demand at this small-area level.

Table 10.1 Available Employment Land, by Sub-Area

Sub-Area	Potential Demand	Assessed Allocated Employment Land 2013 (net)	Other Employment sites (gross)	Vacant Land within existing Employment Areas (net)	TOTAL AVAILABLE LAND
Mosborough / Woodhouse	Weak	8.32ha (6 sites)	0.46ha (1 site)	0	8.78ha (7 sites)
Chapelton / Ecclesfield	Moderate	34.94ha (6 sites)	2.2ha (5 sites)	0	37.14ha (11 sites)
City Centre	Strong	4.26ha (9 sites)	13.43ha (30 sites)	0ha (net) (2 sites)	17.69ha (41 sites)
Upper Don Valley	Strong	28.02ha (18 sites)	12.02ha (11 sites)	0	40.04ha (29 sites)
Lower Don Valley	Strong	100.55ha (25 sites)	19.34ha (9 sites)	0ha (net) (1 site)	119.89ha (35 sites)
Stocksbridge / Deepcar	Weak	10.2 ha (3 sites)	0	0	10.2 ha (3 sites)
Elsewhere in Sheffield	Weak	0	2.32ha (4 sites)	0	2.32ha (4 sites)
Sheffield Total	Moderate	186.29 ha (67 sites)	49.77ha (60 sites)	0ha (net) (3 sites)	236.06 ha (130 sites)

- 10.5 The above analysis demonstrates that in purely quantitative terms, there appears to be an undersupply between the amount required (around 305ha) and the total supply of land in Sheffield City overall (which totals around 236ha). In general terms, the supply of land is skewed towards those areas where demand is perceived to be strongest, i.e. the Lower Don Valley (with just over 50% of the total available employment land) and the Upper Don Valley (17% of available land supply).
- 10.6 As noted elsewhere in the report, these two traditional manufacturing areas continue to benefit from a critical mass of industries, good road connectivity and excellent industrial infrastructure. Land remains in demand in both locations, with parts of the **Upper Don Valley** particularly well suited to ‘bad neighbour’ uses due to the locational characteristics of many of the sites, whilst demand continues to exceed supply in the **Lower Don Valley** as illustrated by the maintenance of rental values despite the ongoing economic downturn. It could be argued that the Upper Don has a disproportionately small supply of available land given its historic economic role within Sheffield.
- 10.7 The **City Centre** has less land available (18ha), albeit this supply is spread across a considerable number of sites (41) to reflect the constrained nature of the City Centre and the likely higher densities achieved here. As noted in Section 4.0, the challenge for the City Centre is reconciling the high supply of space and voids, particularly of ageing poorer quality stock, with the need to provide additional Grade A floorspace to support and sustain Sheffield’s position as the premier office location in South Yorkshire.
- 10.8 As noted in Section 8.0, there remains a strong emphasis in planning policy (both at a national and local level) towards the concentration of office space in the City Centre, with a target of at least 65% of the total

office development in this location moving forward. This has been broadly achieved (on the basis of floorspace rather than land) over the past 20 years or so and would suggest a rate of around 295,000 sqm (or around 14.7 ha at a plot ratio of 200%). This represents a reasonable match with the current availability of land in the City Centre.

- 10.9 In the weaker office/industrial markets of Sheffield, the imbalances are more pronounced. **Chapelton/Ecclesfield** is a case in point. Whilst there have been very successful developments in recent years, such as the Smithywood site, much of the stock is of a generally poor quality. Whilst there is always a certain level of demand for indigenous uses, it is questionable as to whether this level of demand could justify a current supply of around 37ha across 11 sites, which will equate to 16% of the City's total.
- 10.10 In terms of the other areas, namely Mosborough/Woodhouse and Stocksbridge/Deepcar, where it could be argued that demand is weaker and more indigenous, the 19ha of land available over 10 sites would appear to be a closer 'fit' with needs, particularly if there are superior sites with a greater range of sizes available in areas of greater demand elsewhere in Sheffield.
- 10.11 In general therefore, whilst there remains a substantial stock of employment land in Sheffield, it is lower than past take up rates would suggest is needed over the Plan period. The supply also includes a number of sites which are no longer fit for purpose, or for which alternative uses could be more appropriate, restricting supply further. Hence the initial shortfall of around 69ha is likely to increase, potentially justifying further provision.
- 10.12 The study has given appropriate consideration to whether certain sites could be de-allocated or otherwise removed from employment protection, as well as the need to provide new sites better suited to providing a portfolio of around 305ha that can support future economic growth in Sheffield.

The Portfolio of Sites

- 10.13 Economic modelling has identified a net-contraction of manufacturing (B1c/B2) and the growth of offices (B1a/b) and distribution (B8). In overall terms, there is a need to ensure that there are sufficient allocations for office and warehouse development, whilst recognising that there can be a reduction (or more accurately, a rebalancing) in the amount of land available for general industry.
- 10.14 Within the City, land is available for the development of employment premises within six separate locations (as per the City Policies and Sites DPD). Many of these comprise established industrial estates; others are allocations where there has been no development to date. Within these six locations, NLP was asked to analyse 76 sites in detail, as discussed

in Section 9.0. The site assessment work highlighted that a proportion of this stock does not meet the requirements of the market as it is either of a poor quality; in the wrong location; or both.

10.15 Furthermore, the market evidence clearly points toward a need to release more good quality new sites in areas such as the City Centre and the Upper Don Valley. Hence, although there is currently an under-supply of land overall, the need to rebalance the stock and provide more, better quality sites will require measures to be taken to rebalance the portfolio by encouraging the release to alternate uses of a number of the less commercially attractive sites.

10.16 This study has not necessarily sought to focus on those sites recording the lowest scores in identifying candidates for de-allocation or release. This reflects the fact that sites can often perform poorly because of a (relatively) remote location, isolation from strategic roads or the poor quality of occupiers. Nevertheless, such sites can often perform a vital role in supporting local employment and bad neighbour uses and may still be important in meeting local premises' needs.

10.17 In recognition of the above, this study has adopted a delivery-focused approach to identifying candidates for de-allocation or release. Sites have been recommended for release if it is considered that they are unlikely to be developed for B class uses over the Local Plan period, having regard to a variety of considerations including:

- The strength of demand in the area relative to supply;
- Consultation with commercial agents regarding the relative attractiveness of regeneration areas and key industrial sites; and
- Site-specific delivery constraints.

10.18 This approach is considered to be in accordance with The Framework, which (under paragraph 22), states that:

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

10.19 The adoption of this delivery-focused approach has resulted in a number of sites being recommended for de-allocation or release. Whilst it is recognised that in some cases these sites are unlikely to be suitable for alternative uses, they have only been identified where the prospects of delivery for B class uses over the Plan period are considered remote or, alternatively, there is strong pressure for alternative non-B class uses that is supported by both the landowner and the Local Authority, notably where a planning application for alternative uses remains extant.

10.20 Consequently, this study does not consider it appropriate for SCC to necessarily rely upon and plan for these sites to meet their employment land needs. Removing these sites from the future portfolio of land does not, however, prohibit SCC from granting permission for B-class development should an application be received.

10.21 Within this context, Table 10.2 presents the following summary recommendations concerning the total amount of land available at present, and how this portfolio might change following the removal of certain sites from the employment land portfolio, or the need to allow for an element of mixed use development on certain employment sites.

Table 10.2 Recommended adjustments to the Portfolio of Employment Land

Sub-Area	Current Portfolio of 'available' sites		Deductions from the portfolio		Potential New Sites (for B uses)	Adjusted Employment Land Portfolio
	Remaining Allocated Employment Land Feb 2013	Vacant Land within existing Employment Areas (net)	De-allocations (net)	Mixed use with no employment		
Mosborough / Woodhouse	8.78ha (7 sites)	0	0	0	0	8.78 ha (7 sites)
Chapelton/Ecclesfield	37.14ha (11 sites)	0	1.33 ha (1 site)	0	0	35.81 ha (10 sites)
City Centre	17.69ha (39 sites)	0ha (net) (2 sites)	0	1.58 ha (2 sites)	2.27 ha (5 sites)	18.38 ha (46 sites)
Upper Don Valley	40.04ha (29 sites)	0	0	0.68 ha (1 site)	0	39.36 ha (29 sites)
Lower Don Valley	119.89ha (34 sites)	0ha (net) (1 site)	2.43 ha (2 sites)	10.24 ha (2 sites)	2.51 ha (1 site)	109.73 ha (34 sites)
Stocksbridge/Deepcar	10.2 ha (3 sites)	0	1.38 ha (1 site)	6.97 ha (1 site)	0	1.85 ha (2 sites)
Elsewhere in Sheffield	2.32ha (4 sites)	0	0	0	0	2.32 ha (4 sites)
Sheffield Total	236.06 ha (127 sites)	0ha (net) (3 sites)	5.14 ha (4 sites)	19.47 ha (6 sites) (plus 18.26 ha for B-use)	4.78 ha (6 sites)	216.23 ha (132 sites)

De-Allocated Sites

10.22

It is recommended that some 5.14ha across four of the existing allocations / available employment land be de-allocated as follows:

- **Chapelton/Ecclesfield** – Within this Regeneration Area is a poorly performing allocated employment land adjacent to the disused railway at Butterthwaite Lane (Site reference P00262). This comprises a greenfield site, much of which is located within an area of flood risk. The site is isolated with poor local road access and is landlocked by virtue of the adjacent railway line. The site falls within an area with very weak market attractiveness and it is not considered capable of attracting an employment use. It is therefore not recommended that the site should retain its employment allocation.
- **Stocksbridge/Deepear** – One site within this Regeneration Area is recommended for de-allocation at Station Road/Manchester Road (P00271). The site has extant planning permission for housing and is proposed for allocation within the Sites and Places DPD for housing and open space. These would comprise more suitable and viable uses on this constrained site, as it is located within an area of weak market demand.
- **Lower Don Valley** – Two sites are recommended for de-allocation within this Regeneration Area. The first comprises a 1.83 ha site at Nunnery Sidings, or Dixons Site Phase 3 (P00218) which is currently in use as a park and ride, and provides an important function which is unlikely to be replaced by future employment uses. The site is therefore recommended for de-allocation in favour of residential use. The second comprises a small site of 0.6 ha at the Spital Hill Employment Zone (Site reference P00022). Although close to the strategic highway network, local road access is problematic and the site topography is unsuitable for employment use. The site is therefore recommended for de-allocation in favour of residential uses.

10.23

Overall, those areas proposed for de-allocation for the most part fall within areas of limited demand for employment uses, are allocated or subject to planning permissions for alternative uses, or are affected by site specific delivery constraints.

Mixed Use Sites

10.24

A further 37.73 ha is proposed to be re-allocated from B-class employment use only, to incorporate a mix of uses (potentially including an 18.26 ha employment land component). This leaves Sheffield with a dedicated employment land portfolio totalling around **211.45 ha**, or an employment land supply of 12 years, and increases the initial shortfall identified to around **94 ha**.

- 10.25 Two sites are recommended for allocation as mixed use sites within the **City Centre** Regeneration Area, at Hanover Way (P00073) and Pitsmoor Road (P00089). Land and buildings at **Hanover Way** was previously granted planning permission for mixed use development, reflecting the viability issues associated with development of the site for solely employment use. The site forms a suitable site on the edge of the City Centre to deliver a mixed use scheme, and is allocated for office and housing development within the City Policies and Sites DPD. It is recommended that around 50% of this site should be retained for employment uses.
- 10.26 Land at **Pitsmoor Road** is identified within the adopted Core Strategy as a location for the expansion of 'City Centre living' as part of mixed use developments, with the draft City Policies and Sites DPD allocating the site for office use within a flexible policy area. The site is considered to be more suitable for residential use, and is considered that it is unlikely to come forward for office use without an element of cross funding from a higher-value use. It is therefore recommended that the site be allocated for a mix of uses in order to cross-subsidise around 25% for employment use.
- 10.27 Two sites are also proposed for mixed use allocations within the **Lower Don Valley** Regeneration Area. Betafence at Sheffield Road (Site reference P00138) comprises a prominent employment site with very good access to both the strategic and local road network. Land at Weedon Street/Meadowhall Way (P00127) comprises a very large site of 22.5 ha (net) allocated for office development within the Core Strategy, and a flexible business area in the sites and places DPD, and was granted outline planning permission for mixed use development comprising mainly office and residential uses. We are aware that both sites are the subject of planning applications and/or developer interest for retail development. Betafence is currently the subject of pre-application discussions regarding the potential development of a new IKEA store, whilst the Weedon Street/Meadowhall site is currently the subject of a planning appeal for development of a Next Home and Garden store, that was heard in May 2013. Whilst both sites have good market potential and are appropriate for employment use, it is likely that both may require a commercial element in order to cross-subsidise the delivery of employment land. Overall, therefore, it is recommended that the Council adopts a flexible approach to the development of a mix of uses at these two sites in order to deliver employment led development. There will be a range of commercial uses which could provide the level of cross-subsidisation required to bring the site forward and it will be for the Local Authority to consider which is/are the most appropriate in accordance with national and local planning policy requirements.
- 10.28 The Stanley Tools site at Rutland Road (Site reference P00026) within the **Upper Don Valley** has been previously granted planning permission for mixed use development. Due to the site's poor access to the

strategic and local road network, as well as its unfavourable topography, it is considered that it would be better suited for development for a mix of employment and residential uses. Around 0.2 ha of land is recommended to be provided for employment uses in line with the previous planning permission.

- 10.29 The Corus and Outokumpu Works site is an 8ha site within **Stocksbridge/Deepcar** has an existing planning permission for mixed use development comprising 1 ha of employment. The necessary infrastructure required to facilitate development of any kind of employment development at the site is likely to necessitate a mix of higher value uses here.
- 10.30 Overall, the sites recommended for mixed use allocations for the most part provide suitable employment sites which require a higher value element in order to cross fund delivery of the employment element. SCC should adopt a flexible approach regarding the need to accommodate housing and other land uses on part of these sites in order to provide cross-subsidisation of lower value uses. Determination of the amount of employment land capable of being delivered can be further assessed through the Council's Local Plan, additional masterplanning work and/or as part of an assessment of the site's viability (as discussed in further detail below).

Potential Employment Sites

- 10.31 This analysis has demonstrated that Sheffield as a whole has an undersupply of employment land. In planning for an 18 year plan period (to 2031), the analysis therefore indicates that there is scope for bringing forward new or unallocated employment sites elsewhere in the City to address the shortfall. Nine additional potential employment sites have been identified and could, in whole or in part, be allocated to provide additional employment land.
- 10.32 As reflected in Tables 10.1 and 10.2, three of these sites are already in employment use but are currently afforded no policy protection. Whilst there is currently no net vacant land available on which to deliver employment uses, these sites are located within important employment areas in the City and should retain the employment policy protection that Policy CS1 of the Core Strategy provides them in planning terms. It is therefore proposed that these sites are allocated as employment uses to ensure their continued contribution to the employment land supply in future years.
- 10.33 In addition to these existing sites, a number of other potential sites not currently in employment use have been identified as potential employment allocations either within the Council's emerging City Policies and Sites DPD, or through Officer's knowledge of the area. Six potential

new sites have been identified (see Appendix 3) totalling an estimated 4.78ha net as follows:

- 1 **Doncaster Street/Shepherd Street** (Site reference P00057) – This site has a net area of 0.99ha net which could provide additional employment land within the City Centre Regeneration Area. The site currently comprises a large vacant site which was originally allocated as a Business Area within the Sheffield Unitary Development Plan, but is highlighted as a transitional area in Sheffield’s Core Strategy to encourage the relocation of industrial uses away from the City Centre. Detailed site assessments concluded that alternative uses are unlikely to be attracted to this site in the current economic climate. However, the site boasts a prominent location at a ‘gateway’ site and is generally unconstrained. The site is therefore considered to provide the opportunity to deliver a number of employment uses as a forthcoming employment allocation.
- 2 **Carver Lane/Holly Street** (Site reference P00043) – This site is 0.54 ha (net) in size and is located within the City Centre Regeneration Area and is currently in use as a car park. The site is allocated within the Sheffield UDP as a Central Shopping Area and City Centre Housing Priority Zone, and falls within the Core Retail Area within the adopted Core Strategy. Consideration of this site has confirmed its appropriateness for office use as per the draft City Policies and Sites DPD. Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.
- 3 **West Bar Triangle** (Site reference P00121) – This 0.5 ha (net) site is located within the City Centre Regeneration Area. Around half of the site is currently built-out as a mixture of manufacturing and office uses, alongside areas of car parking. The site was allocated as a General Industry Area without special industries within the Sheffield UDP, and subsequently highlighted as a Transition Area within the adopted Core Strategy. The West Bar Interim Planning Guidance [West Bar IPG] comprises a material consideration in determining planning applications for this City Centre site and provides key principals for new development proposals which promotes the highest quality urban design and architecture through the comprehensive redevelopment of the site. This guidance will inform progression of the Sheffield Local Plan [City Policies and Sites DPD] which currently proposes the allocation of the site for office use within a Business Policy Area. Overall, the site is considered to provide a good opportunity within a prominent location suitable to provide new office development within the City Centre whilst also contributing to the regeneration of the site.

- 4 **Hamer Lane/Sheaf Street** (Ref P00470) – This 0.15 ha (net) site is located within the City Centre Regeneration Area, and allocated within the UDP as open space. The Draft City Policies and Sites DPD allocates the area for office development within an Office Policy Area. The site is accessible from both the strategic and local highway network, and is in close proximity to Sheffield railway station which will increase the site’s accessibility via a range of transport modes. The site is within an area of strong market demand and is well located in relation to other business uses within an established office area. Indeed, the site was included within the area applied for exemption from permitted change of use to residential as a priority office area. The site is therefore considered to offer the opportunity for development of a range of employment uses and is recommended to be carried forward as an employment allocation.

- 5 **Nelson Mandela Building, Pond Street** (Site reference P00083) – This site is 0.23 ha (net) in size and is located within the City Centre Regeneration Area. The UDP allocates the site as Open Space; however, the preferred use within the City Policies and Sites DPD is stated as office development within a Business Policy Area. The site is well positioned in a prominent location within an area of known demand and has no known development constraints. A previous planning permission (now expired) proposed the site for development of a mix of uses. It is considered that this would appear to be the most appropriate approach to bring the site forward for development. The site is therefore proposed for allocation as a mixed use site to incorporate an element (40%) of employment uses (comprising 0.09 ha of land).

- 6 **Alsing Road** (Site reference P00129) – This site provides an additional 2.51 ha net employment land within the Lower Don Valley Regeneration Area. The site is currently in use as a car park and is allocated within the UDP as a Regional Shopping Centre. The site is proposed to be allocated for general employment use within the City Policies and Sites DPD to allow a range of employment uses to be developed. The site is considered to be under-utilised at present, and provides a suitable site for the development of a range of employment uses by virtue of its location within an area of strong market demand and benefiting from access to the strategic road network. The site is therefore recommended for allocation as an employment site.

10.34

In summary, the additional six sites identified within the City Centre and Lower Don Valley Regeneration Areas could accommodate 4.78 ha of the total employment land requirement of 305 ha for the period to 2031. It is recommended that all of the above sites are allocated to provide additional employment land. This would increase Sheffield’s dedicated employment land portfolio to around **217 ha**, or an employment land

supply of around 13 years, and reduce the undersupply of employment land in total to around 88 ha.

10.35 As referred to above, and particularly in the case of the Nelson Mandela Building, in determining an appropriate amount of employment land to be delivered on each site, SCC may need to consider accommodating an element of alternative land uses, such as retail on the ground floor below office uses, where this will help to facilitate the desired employment uses.

Proposed Portfolio of Sites

10.36 The summary matrix at Appendix 4 identifies site-specific recommendations for the existing, allocated/available and potential employment sites in Sheffield City as discussed in detail above. These are summarised in Table 10.3.

10.37 Clearly, any site-specific recommendations contained within this document cannot be viewed in isolation. Recommendations will need to be taken forward and tested through the proper preparation of policy by SCC and subject to suitable consultation as part of its Local Plan preparation process.

Table 10.3 Resultant Portfolio of Employment Land (net) in Sheffield City to 2031

Proposal	Number of Sites	Site Area (ha)	Developable Area (ha)	Employment Area (ha)
Retain Current Employment Allocation – Un-assessed sites	60	49.77	49.77	49.77
Retain Current Employment Allocation – Assessed sites	57	175.41	143.43	143.43
Allocate vacant land within existing employment area for B-Class use	3	8.18	0	0
Employment land component of re-allocated Mixed Use sites	6	43.71	37.72	18.26
Employment Land Portfolio	126	277.07	230.92	211.46
De-allocate	4	5.89	5.14	5.14
Sites to be Excluded From Portfolio	4	5.89	5.14	5.14
TOTAL	136	282.96	236.06	216.60

10.38 Section 8.0 identified that around 305 ha of employment land was required over the 18 year plan period 2013 to 2031. Table 10.3 indicates that retention of all existing employment allocations provides a total of around 236ha. This leaves a shortfall of employment land of 69 ha.

10.39 The above analysis (Table 10.3) recommends that the current portfolio of land should be re-adjusted slightly (through de-allocations and re-allocation to mixed use sites) resulting in around 211 ha net of land to be allocated in the Local Plan specifically for B-class employment use. This would leave a shortfall of around 94ha.

- 10.40 Should the additional potential of the sites referred to above come forward as proposed, this would help to address some of the quantitative shortfall and provide 4.78 ha of land for B-class employment use, increasing Sheffield's dedicated employment land portfolio to around 217 ha and reducing the undersupply to around 88 ha.
- 10.41 However, in purely quantitative terms, the adjusted portfolio recommended above is still insufficient to meet Sheffield's requirements over the plan period, providing an employment land supply of around 13 years. The next step for SCC will be to identify new locations or 'areas of search', where new employment sites could be accommodated over the plan period.
- 10.42 Furthermore, as the sub-area analysis has revealed, whilst existing supply is well matched to demand in some of the most strongly performing areas (particularly the Lower Don Valley), there is a need for future proposals to attempt to re-balance the future portfolio of sites in order to increase opportunities within Upper Don Valley and the City Centre relative to areas of weaker market demand in Chapeltown / Ecclesfield, Mosborough/Woodhouse and Stocksbridge/Deepcar. This is discussed in further detail below.

Proposed Areas of Search

- 10.43 As referred to above, even with the inclusion of additional identified sites, there remains a significant shortfall in available employment land of around 90ha. It is therefore important that a number of 'areas of search' are identified by SCC as suitable locations where additional employment land could be brought forward over the plan period. Such areas must be sustainable, in areas of strong market demand and identified areas of need, in order to re-balance the existing portfolio of land in order to provide better employment sites in more appropriate locations throughout the City.
- 10.44 As identified within Table 10.1, the strongest areas of market demand are located in the City Centre and in the Upper and Lower Don Valleys. The supply of employment land is generally skewed towards the Lower Don Valley, which contains over 50% of the total available employment land, but the proportion of available land within the Upper Don Valley is considered to be low at just 17% of total available land. The City Centre provides a lower proportion of 7.5% of the employment land supply, albeit this is considered to be appropriate in light of the higher densities achieved in this location. Chapeltown/Ecclesfield is identified as having a disproportionately high proportion of the City's employment space (16%) considering this area's moderate demand for employment uses. The proportion of employment land in Mosborough/Woodhouse and Stocksbridge/Deepcar is considered appropriate to provide for local and indigenous employment needs within these areas of weak market demand.

10.45 Overall, therefore, the Lower and Upper Don Valleys, and to some extent the City Centre, are the main areas where the identified shortfall in employment land is most pronounced relative to demand, and suggests there is some scope to increase the supply of employment land within these locations relative to land within Chapeltown/Ecclesfield in order to rebalance the portfolio of sites to towards those areas of stronger market demand.

10.46 To this end, Table 10.4 assigns each sub-area with an indicative land requirement (as a proportion of the total undersupply) that the Council could adopt to inform the location of potential areas of search:

Table 10.4 Indicative Land Requirements within future Areas of Search

Sub-Area	Potential Demand	Indicative Land Requirement (ha/% of total requirement)
Upper Don Valley	Strong	35 ha (40%)
Lower Don Valley	Strong	30 ha (35%)
City Centre	Strong	10 ha (10%)
Stocksbridge / Deepcar	Weak	5 ha (5%)
Mosborough / Woodhouse	Weak	5 ha (5%)
Chapeltown / Ecclesfield	Moderate	0 ha (0%)
Elsewhere in Sheffield	Weak	5 ha (5%)
TOTAL		89 ha (100%)

10.47 It is important that future allocations (or identified land) within these areas are clustered together, rather than be dispersed across a wide portfolio of sites, in order to provide a sufficient concentration or agglomeration of employment uses in order to achieve the critical mass required to secure the necessary investment, business infrastructure and occupier interest.

Sub-Regional Employment Land Considerations

10.48 The Framework sets out a requirement for Local Authorities to meet their own employment land supply needs in accordance with economic aspirations. Sheffield's employment land requirement is identified as 305 ha over the period 2013-2031. As we have set out above, Sheffield is able to accommodate around 211 ha of this requirement, and it is recommended that additional areas of search are identified in which the remainder of the City's employment land requirements might be delivered.

10.49 In addition to this, consideration has been given to the employment land supply in the neighbouring authorities, and in particular those sites and sectors directly affecting Sheffield, to assess the extent to which Sheffield's employment land requirement may be met within adjoining authorities. Reference is made to the joint Sheffield/Rotherham

functional economic area and the roles that sites such as the AMP play in contributing towards provision.

- **Rotherham** – As referred to in Section 6.0, Rotherham and Sheffield are acknowledged as functioning as a single economic unit, with the Enterprise Zone and key employment locations straddling the boundary of the two authorities. In particular, the Advanced Manufacturing Park (AMP) which adjoins Sheffield’s authority boundary has direct implications for job creation and economic activity within Sheffield. Recently announced expansion plans at the AMP to provide an additional 18,500 sqm of industrial units on a 5 ha site can therefore genuinely be considered to contribute to meeting some of Sheffield’s employment needs. It follows that the additional 32 ha of land available across the remainder of the park will also contribute to an element of Sheffield’s employment land requirement.
- **Doncaster** – Doncaster does not directly adjoin Sheffield, and demonstrates weaker relationships with the City in terms of in-commuting and direct economic links. Having said this, the remaining supply of employment land in the town is extremely high (547 ha) as a result of a number of large scale extant planning permissions for distribution and logistics uses, and the town has a vast future supply of large scale distribution uses and logistics terminals against a more limited amount of high quality office or advanced manufacturing sites. Doncaster therefore has the potential to accommodate an element of Sheffield’s requirement for additional land for large scale B8 uses, particularly given that Sheffield’s topography prevents it from providing many suitable large, flat sites, whilst complementing the provisions of high quality office development and advanced manufacturing facilities in Sheffield.

10.50 Further discussions will need to be undertaken by officers at SCC and Rotherham MBC, as well as Doncaster MBC, in accordance with the Duty to Cooperate, to discuss and agree whether land within these nearby authorities may effectively contribute to meeting Sheffield’s employment land needs, and how this would be feed into the preparation of any future sub-regional employment land position statement.

Non-B Class Uses

10.51 Growth of Non B Class uses is likely to make an important contribution to employment growth in Sheffield by 2031. The growth needs of a number of Non B sectors have been considered where job growth is forecast, and there is potential for this to create additional pressures on employment land. These sectors include retail, healthcare, residential care homes, and institutional uses.

- 10.52 As set out in Section 6.0, Sheffield has previously experienced pressure on employment areas for retail, and to a lesser extent leisure, uses with annual losses totalling 3 ha per annum since 2001. The majority of additional retail requirements within Sheffield will be directed to the Primary Shopping Area of Sheffield City Centre (within the Sevenstone development), and the defined District Centres thereafter. However, even after the Sevenstone development, a significant amount of capacity for additional retail floorspace will remain. Furthermore, we are aware of two large scale retail proposals on allocated employment sites on land within the Lower Don Valley (as discussed in paragraph 10.27 above).
- 10.53 Given the shortfall of employment land and current low values for industrial development created by the prevailing economic conditions, it is important that retail/quasi retail uses do not put undue pressure on the remaining employment land supply, whilst recognising that a flexible approach may need to be adopted in order to cross fund the delivery of the desired employment uses. Whilst provisions within the Core Strategy and The Framework resist large scale retail development in out of centre sites not allocated for retail purposes (without adequate justification), it may be possible to strengthen local plan policy in order to prevent the development of employment land for retail uses unless this can be justified in relation to a number of delivery focused criteria. An alternative approach is to engage in masterplanning exercises and viability assessments to inform more detailed allocations and site specific policies in areas of known risk within the forthcoming City Policies and Sites DPD.
- 10.54 In relation to land pressures from other non-B class uses, most of the future growth needs of the healthcare and education sectors are likely to be met within existing sites in such use, and the scale will be limited by continuing constraints on public sector spending. Sheffield does not have a history of losing employment land to residential care homes, and most future needs are likely to be met through expansion of existing facilities or re-use of other institutional premises rather than development on Sheffield's employment areas where the environment is not always appropriate.
- 10.55 Sheffield currently has sufficient capacity to accommodate all waste requirements up to 2019, following which any additional need would be met through agreement with adjoining authorities, rather than through the identification of additional sites. The City's future land requirement for waste purposes is therefore minimal. There has been some historical loss of employment space within Sheffield to institutional uses such as education and training, but the scale has been relatively small and future growth is likely to be limited.

Policy Advice and Delivery Mechanisms

10.56 As this study has shown, given the shortfall in available employment land to meet the identified requirement, Sheffield should be seeking to protect its existing employment land supply and should take a strong line in resisting pressure on such land in order to avoid the loss of any significant amounts of employment land in the future. This section considers policy measures relating to qualitative employment land issues, such as how to renew and upgrade existing sites, and how to encourage modern employment development within the constraints of a limited supply of potential new sites, which may be required to support Sheffield's economic growth objectives.

Current Council Policies and Policy Choices

10.57 As referred to in Section 2.0, Sheffield's adopted Core Strategy (Policy CS1) requires maintenance of a five year supply of employment land totalling 145 ha. This equates to a requirement for 493 ha over the 17 year plan period. This study has identified a requirement for 305 ha over the plan period, or a five year rolling supply of 85 ha. There is therefore a significant discrepancy between the land requirement proposed within the Core Strategy, and the recommendations of this study which will subsequently inform the City Policies and Sites DPD.

10.58 The approach undertaken within the Core Strategy's evidence base to calculating the employment land requirement was based on a similar approach to this study, i.e. of past take up rates whilst making an allowance for flexibility and choice, the need for redevelopment, relocation and modernising of businesses, and the potential to accommodate identified growth sectors and encourage economic growth. Whilst adopting the same overall approach, this study utilises more up to date information and, significantly, factors in the impact of the economic downturn which explains the significant reduction in the land supply requirement identified. It is noted within the Core Strategy that a revision to Policy CS1 will be undertaken if required following the review of actual take up rates. Since the two studies are consistent in terms of their overall approach, it is entirely appropriate that the overall employment land requirement figure be reduced in light of this most recent study, with allocations made accordingly through progression of the City Policies and Sites DPD.

10.59 Policy CS6 of the Core Strategy identifies a series of 'Transition Areas' comprising manufacturing sites in and around the City Centre, and resists the continuation and/or expansion of these uses in favour of allowing businesses with a City Centre requirement to locate here. This policy provides an appropriate strategy to re-balance employment uses to more appropriate areas of market demand to help achieve Sheffield's economic strategy. The approach will be strengthened by forthcoming

allocations within the City Policies and Sites document (as informed by this study) as well as the identification of proposed areas of search which respond to areas of required need and strong market demand.

10.60 In more general terms, Core Strategy Policy CS1 aims to safeguard land within identified industry and business areas, unless industry or business uses would no longer be appropriate. Otherwise, adopted Core Strategy policies provide limited resistance against the loss of employment land (by use) to alternative uses, and there is a case for strengthening the protection afforded to allocated employment sites (for example by the inclusion of policies within the City Policies and Sites DPD which require a minimum period of marketing to be undertaken to justify lack of demand; the need for a viability assessment to justify cross-subsidisation; and an assessment to be undertaken of the potential impact on the future operation and function of the employment area and the local employment land supply).

10.61 In addition, developing agreed masterplans or planning briefs for key office sites, where the viability of the required mix of uses has been tested, would also provide greater clarity of what is required and achievable whilst providing a greater focus as to where future office development should be concentrated taking into account national and local planning policy objectives.

Other Delivery Mechanisms

10.62 As referred to in earlier Sections of this report, Sheffield has a large number of previously developed and brownfield sites which could provide opportunities for additional employment development. However, within the City, as experienced elsewhere in the country, relatively low levels of demand and rent generated in the current economic climate undermines the viability of the speculative development of employment premises. Developers and those businesses seeking to develop bespoke employment premises will avoid sites with high levels of abnormal cost. A range of interventions may be therefore be required before brownfield plots are readily available for development, including demolition, grubbing up foundations, levelling, remediation of contamination, renewal of infrastructure and utility supplies etc.

10.63 The 'site constraints' criterion of the qualitative assessment distinguishes between sites with no, modest or major remediation requirements. Only two sites were scored as having no visible barriers to development in terms of site constraints. These are:

- A small site (0.54 ha net) on Meadowbrook Park (Site reference P00373) in the Mosborough/Woodhouse Regeneration Area.
- The large (22.5 ha net) site at Weedon Street/Meadowhall (Site reference P00127).

- 10.64 A further 14 sites have minor infrastructure and/or remediation requirements. Ten of the sites assessed were identified as requiring significant remediation and were given the lowest score of 1 to reflect this.
- 10.65 The qualitative assessment also considered whether significant investment in infrastructure would be required to bring sites forward for development. Three sites were considered to require no (or very limited) investment in additional infrastructure as follows:
- Smithywood, Cowley Hill, Chapeltown (Site reference P00287);
 - Former Tinsley Marshalling Yards, Europa Link LDV (Site reference P00165); and
 - Upwell Street/Colliery Road LDV (Site reference P00001).
- 10.66 Sites at Corus and Outokumpu (New Site); land at Parkwood Springs Business Park (P00016); and land to the rear of Davy McKee (Prince of Wales Road) (P00136) are all identified as having significant abnormal costs associated with the provision of site infrastructure. Land at Wardsend Road (P00247) is predominantly greenfield with limited existing infrastructure and will therefore require major infrastructure provision.
- 10.67 With limited funding available for site servicing and remediation, regard should be had to the use of cross-subsidisation to bring forward employment sites (as discussed in more detail above). If the market alone is unable to deliver these improvements, encouragement for owners/developers may be necessary, and could be aided by a range of planning and economic development interventions including:
- a A Local Plan policy encouraging such forms of upgrading, although this will only work in combination with other actions;
 - b Continued and stronger Local Plan policy protection for certain employment sites reducing the potential for residential 'hope value' pricing out development;
 - c Encouragement of mixed use developments to help facilitate and cross-subsidise the creation of B class premises where appropriate in planning policy terms (as referred to above);
 - d The use of funding sources associated with the LEP and fiscal incentives associated with the Sheffield City Region Enterprise Zone (discussed in further detail below);
 - e SCC involvement in instigating opportunities for Business Improvements District (BID) schemes in suitable areas (as with the Lower Don Valley Flood Defence Project BID);
 - f Use Creative Sheffield and other marketing initiatives to publicise success stories and case studies of successful upgrading of business premises, including costs, local contractors involved and rental or other benefits achieved; and

g SCC economic development officers engaging directly with owners on upgrading of premises.

10.68 The establishment of the Sheffield City Region Enterprise Zone provides a range of incentives to help facilitate development including fiscal incentives and tax relief, fast Broadband connectivity and relaxation of planning laws. A significant opportunity also exists in relation to the significant funding resources which will be made available to the Sheffield City Region Local Enterprise Partnership [LEP] and which could contribute to the delivery of difficult, or constrained, potential employment sites.

10.69 There may also be the potential to explore different funding sources (e.g. Tax Increment Financing and the designation of Business Improvement Districts) and other potential sources of grant aid to enable small/medium firms to upgrade premises or develop new premises if the market does not deliver these improvements. This could also include a number of forms of direct Council financial support such as a Business Improvement Grant, direct lending to small firms and/or mortgage support, as well as grants to install renewable energy equipment. It is recognised that such measures will be harder to fund in the current economic climate and rolling back of public expenditure.

10.70 Figure 10.1 summarises a range of site delivery approaches applying to different situations, some of which may be appropriate to Sheffield’s key employment sites.

Figure 10.1 Potential Mechanisms to Encourage Employment Development

Approach	Deliver New Sites		Deliver New Employment Space		Renew / upgrade employment space	
	Low	High	Low	High	Low	High
Regional Growth Fund						
Growing Places Fund						
Community Infrastructure Levy						
Tax Increment Funding						
Joint Venture						
Enabling Development						
LDO						
BID						
Rent Guarantees						
Business Improvement Grants						

Source: NLP Analysis

limited potential some potential good potential

Attracting New Office Occupiers

- 10.71 As referred to above, a key challenge for the City Centre office market is reconciling the supply of space and voids, particularly of ageing poorer quality stock, with the need to provide additional Grade A floorspace to support and sustain Sheffield's position as the premier office location in South Yorkshire.
- 10.72 In this context, it will be key to ensure that Sheffield has an adequate supply of good quality, modern offices of the right scale, type and location to meet the demand and attract new occupiers. As we have identified above, this means providing new, Grade A office schemes within the City Centre, either in established office areas or in other areas which are in close proximity to business services, main town centre uses and public transport where a sufficient cluster of office development might be delivered. Locations such as the West Bar Triangle remain important sites for the future development of City Centre office space, but must be subject to a flexible approach to development proposals to incorporate complementary uses (including non-employment creating uses such as residential) to establish a destination location.
- 10.73 The required rebalance may involve re-setting the Sheffield office market by allowing some older, obsolete, and vacant large office blocks to be redeveloped for residential, mixed use schemes or for other town centre uses, particularly high quality leisure operations, seen as important stimulators of interest in City Centre investment. At the same time, planning policy could help support a greater office role for the City by providing clarity and certainty for investors about potential development sites, and encouraging a range of sites and premises to meet office needs. Re-allocation of poor office sites, or a more flexible approach to alternative development proposals, would enhance strong sites in strategic locations and areas of demand and hasten the desired rebalance of supply and demand. Given the difficulty with speculative office development in the current economic climate, the Council may need to give consideration to those delivery mechanisms referred to above to help bring forward such development.

Other Delivery Mechanisms

- 10.74 Firstly, **Section 106 agreements** from larger developments could potentially be used, either directly or indirectly, to deliver workspace. This would be subject to the regulations governing these mechanisms. This particularly applies to schemes which involve a mixed-use redevelopment of existing employment land. Provision could be either on-site or, in some cases, at an alternative location. It should be noted that the ability for projects to generate sufficient profit to enable such levies may be limited in all but the most buoyant of markets.

- 10.75 Where the development lies within an area of low industrial and office demand (i.e. areas with high vacancy rates at present), subject to the legal provisions governing such approaches, funding from sources such as S106 contributions could be pooled and used to develop workspace on other sites, perhaps including those in Council ownership, and loans or grants to firms to support upgrading of premises. This could also potentially be used to fund further enterprise or incubation workspace.
- 10.76 As referred to above, if there are areas where large-scale change may be required in order to deliver workspace, a **Planning Brief or Development Brief** or an **Area Action Plan (AAP)** could be considered as a tool for identifying how new development should come forward.
- 10.77 The use of **Local Development Orders (LDO)** is another potential mechanism that could be considered in some appropriate situations. These allow Councils to identify specific areas/sites where express planning permission is not required for certain types of development. Examples applying to industrial estates could include alterations or certain levels of extensions to premises; construction of new employment premises within specified limits; and some types of change of use. In some situations, this approach could provide benefits to occupiers/developers through greater flexibility, speed, certainty of outcome and reduced cost.

Summary

- 10.78 Previous sections of this report have highlighted the need for a quantitative increase in the office and industrial stock to around 305 ha (gross) to 2031. In quantitative terms, therefore, Sheffield has an undersupply of employment land against a total supply for the City of 236 ha overall. Furthermore, the sub-area analysis has revealed that whilst existing supply is, for the most part, well matched to demand, there is the opportunity to rebalance the portfolio of employment sites to provide more sites within areas of identified need and strong market demand relative to weaker market areas, particularly in relation to the Chapeltown/Ecclesfield area. In addition, barriers to the redevelopment / improvement of industrial sites remain as a result of suppressed commercial values and competing higher value uses in some locations.
- 10.79 Based on the site analysis work, the portfolio has been refined to around 217ha (net). This includes 57 sites with a retained allocation (alongside the additional 60 sites not considered in detail by the study), plus the potential for 1 more mixed use site and an additional 8 employment allocations (three new and five existing) which together could provide additional employment land element totalling around 4.83 ha (net).
- 10.80 Even with the inclusion of additional sites, there remains a significant shortfall in available employment land of around 90ha. It is therefore important that a number of 'areas of search' are identified by SCC as

suitable locations where additional employment land could be brought forward over the plan period. Such areas must be sustainable, in areas of strong market demand and identified areas of need, in order to re-balance the existing portfolio of land in order to provide better employment sites in more appropriate locations throughout the City.

10.81 A number of planning and economic development interventions could significantly improve the level of development and premises renewal activity including strengthened policy protection for B-class land, use of BID schemes, and engaging with land owners. A significant opportunity exists to harness funds associated with the Sheffield City Region LEP which could contribute to the delivery of unviable or constrained employment sites, as well as the fiscal incentives associated with the Enterprise Zone.

10.82 A number of mechanisms can be used to facilitate the delivery of workspace, including using mixed use developments and S106 agreements to pay for workspace either on-site or off-site, as well as other planning tools such as Area Action Plans and Planning/Development Briefs. However, any new provision should ensure that the layout, location and type of space is attractive to the market rather than purely focusing on the quantum of space delivered.

Conclusions

The following conclusions can be drawn from this study on the future requirements for employment space and commercial leisure in Sheffield City.

Sheffield's economy has undergone significant structural change in recent years, with substantial employment losses in metal based manufacturing. Even prior to the recession(s) the local economy grew at rates below national and regional averages. Despite this, manufacturing remains as a significant employer, and growth sector, making an important contribution to Sheffield's economy.

Restructuring of the steel industry has led to a massive reduction in traditional manufacturing jobs in Sheffield, with employment in the metal industry forecast to decline further still, equating to a reduction in employment within this sector of 90% between 1997 and 2031. Having said this, manufacturing is still a significant employer in Sheffield and makes an important contribution to Sheffield's economic output.

Unemployment has noticeably risen in Sheffield as a result of the recession in line with regional averages. Prior to the recession, the local economy in Sheffield was characterised by lower levels of growth, business health and entrepreneurial activity than regional and national averages, albeit the post recessionary period has seen an improvement in the number of business births and deaths indicating increased resilience amongst the business community. Employment in Sheffield is dominated by the retail, health and education sectors, with health and education comprising the City's fastest growing sectors alongside public administration and defence. The legacy of the recession(s) and public sector cuts will therefore undoubtedly place strains on the local economy over the short to medium term, with Sheffield being vulnerable to further public sector job cuts.

Whilst Sheffield ranks as the least deprived authority within South Yorkshire, pockets of high deprivation levels are present within the City Centre, Ecclesfield and Chapelton/High Green areas in stark contrast to highly affluent areas to the south and west of the City in suburbs such as Hallam. The presence of a number of local universities results in a higher than average proportion of highly skilled worked educated to degree level or above, and a corresponding high proportion of local firms operating in knowledge based industries. Furthermore, Sheffield's level of out-commuting in 2001 was low at just under 20%.

Alongside predicted job growth (based on past performance) in professional services, administration and support and education and health sectors, Sheffield provides a number of high value priority growth sectors that will influence employment land and premises requirements

in the City. These specifically include Advanced manufacturing and materials; Business, professional and financial services; Creative and digital industries; Energy, environmental and low carbon industries; and Healthcare technologies. These sectors build on Sheffield's established reputation and track record which, alongside other factors such as the Sheffield City Region and Enterprise Zone, offer optimism for future growth in revenue and jobs.

Past take up of land in the pre-recession period was high, but has significantly declined in the post-recession period.

- 11.6 Past take up of employment land in Sheffield has historically been high, averaging 14.0 ha over the past 22 years, and around 13 ha over the past 10. However, unsurprisingly the last five years has seen a significant decline in the amount of land developed, with annual rates falling to just 5.95 ha, reflecting the recession and subsequent low levels of growth.
- 11.7 The take up of employment uses has fluctuated over the period 1989 to 2011 in terms of both amount and use type. Development rates were historically dominated by general industrial (B2) uses but this is now declining against a generally rising pattern of office floorspace development.
- 11.8 The take up figures for B2 and B8 uses are distorted by an unusually large development in 2006 – the 17 ha 'SIRFT' (Sheffield International Rail Freight Terminal) development on the former Tinsley Marshalling Sidings, Europa Link, which resulted in higher levels of delivery of B2 and B8 uses than have been experienced either before or since this date. Otherwise, past take up rates are considered to provide a reasonable representation as the basis for future planning as they cover a period which includes both strong growth and recession in the City.
- 11.9 Historic losses of land within Sheffield's Business and Industrial Policy Areas lost to non-B class uses in the City have historically been high. Such losses appear to be on a downward trend, although this is likely to be masked by overall reductions in construction given the prevailing economic conditions, and higher value development remains a potential barrier to employment development.
- 11.10 From discussions with stakeholders and commercial agents it is generally considered that there is a strong market for both industrial and office floorspace within Sheffield. Demand is particularly high in the City Centre (for office uses) and the Upper and Lower Don Valleys for industrial use. However, high vacancy rates in the City suggest that the quality of available office space does not meet occupier standards and requirements, and there is a need to provide quality industrial and office sites in areas of strong market demand in order to retain and

accommodate existing businesses and attract new occupiers to Sheffield.

The City requires around 305ha (gross) to meet employment land needs up to 2031.

11.11 Based on projecting forward past trends and allowing for the re-provision of likely losses to non-B-class uses, it is suggested that Sheffield City could require in the order of **305 ha gross 2013-31**. This equates to an annual employment land requirement of 17 ha per year over the 18 year plan period, or a five year requirement for 85 ha.

11.12 This stands in contrast to the demand forecasts based on the Experian Baseline econometric model which indicates a requirement for 101.0ha gross over the same time period, with a bias towards B8 warehousing and B1a office. A scenario based solely on projecting forward past job growth levels indicates a level of need around 51ha (weighted more towards B8 provision).

Table 11.1 Summary Employment Land Scenarios 2011-29

Scenario		Net	Gross
Econometric Labour	Experian Baseline Job Growth	+5.69ha	+101.0ha
Demand Forecasting	Policy On	+32.82ha	+128.1ha
Past Take Up Continues		209.52ha	+304.8ha
Labour Supply Growth		104.56ha	+199.8ha

11.13 Economic modelling has identified the net-contraction of manufacturing (B1b/B1c/B2) and the growth of offices (B1a) and distribution (B8). On the basis of these considerations, it is considered that almost half of Sheffield’s identified employment land requirement (150ha) should be for B1c/B2; 63ha for B1a/b, and a further 92ha for B8 warehousing.

11.14 In overall terms, there is a need to ensure that there are sufficient allocations for office and warehouse development, whilst recognising that there can be a reduction (or more accurately, a rebalancing) in the land available for general industry. This figure accommodates opportunities for Sheffield to develop its competitive advantage in the five identified growth sectors (referred to above) alongside its established manufacturing strength and reputation, whilst factoring in the uncertainty of the ongoing economic downturn and public sector relocations.

The City has a shortfall of available employment land in quantitative terms over the period 2013-2031

11.15 The City currently has a total of around 236ha of land for B-class employment use comprising allocated and 'available' vacant sites within existing employment areas. In general therefore, whilst it appears that there remains a substantial stock of employment land in Sheffield, it is lower than past take up rates would suggest is needed over the Plan period.

11.16 In basic quantitative terms, the City therefore has a shortfall of employment land of 69 ha. This undersupply increases to 94ha when adjustments are made to de-allocate existing allocations and employment land and re-allocate employment land to incorporate a mix of uses (including an element of B-class employment use).

11.17 The location of employment sites in Sheffield has largely been determined by historic factors. Whilst existing supply is for the most part well matched to demand (particularly in relation to the Lower Don Valley), it could be argued that the Upper Don Valley has a disproportionately small supply of available land given its historic economic role within Sheffield, whilst the area of Chapelton/Ecclesfield contains a disproportionately high amount of the City's employment land supply.

Following a detailed review of 67 committed employment sites and allocations in the City, it is recommended that 57 of these are carried forward to the employment land portfolio, totalling 143ha (net) of employment land. There is the potential for a further 16ha (gross) of further land to be added to the portfolio through the allocation of existing (but unallocated) employment sites, and other newly identified employment sites (either in whole or in the part).

11.18 The characteristics and quality of provision of 81 individual employment sites were assessed within six separate 'regeneration areas' of the City (as identified within the City Policies and Sites DPD). Of the 81 sites, 67 were committed employment allocations within the Sheffield UDP or adopted Core Strategy; three were existing, but unallocated, employment sites, and six comprised new sites with the potential to deliver employment uses. Five sites were removed from the assessment on the basis that they were fully developed and could add nothing further to the employment land supply.

11.19 Issues reviewed included each area's locational context; accessibility; constraints; existing sectoral mix; size and type of businesses; amount of floorspace required; compliance with planning policy; market attractiveness and likelihood and viability of site redevelopment. The full assessment is summarised in Appendix 4, with the individual site pro-

formas in Appendix 3.

- 11.20 As indicated in Table 11.2, it is recommended that the majority of sites (57 in total) are retained as employment allocations, with some limited adjustment to the current portfolio to accommodate de-allocations and mixed use sites. It is recommended that some 5.14ha of the existing identified sites/available employment land be de-allocated. A further 37.72 ha would be reallocated from B-class employment use only, to incorporate a mix of uses (potentially including a 18.26 ha employment land component). It is assumed that all 60 of those sites not assessed by NLP will be carried forward as allocations to continue to contribute to Sheffield's employment land supply. This results in around 211 ha land identified in the Local Plan specifically for B-class employment use. This would leave a shortfall of around 94ha.
- 11.21 To partly address this shortfall, nine additional potential sites were assessed with the potential to accommodate to the future employment land supply, either in whole or in part. This included three existing but unallocated employment sites, and six further sites identified either within the City Policies and Sites DPD or through discussions with Officers. This included five sites within the City Centre and one within the Lower Don Valley. Of these sites, it was recommended that all should be carried forward as employment allocations. The Nelson Mandela building was recommended for allocation as a mixed use site as the most appropriate approach to bringing the site forward for development.
- 11.22 Allocating these sites as recommended provides an additional 4.83 ha of land for B-class employment use, increasing Sheffield's dedicated employment land portfolio to around 217 ha and reducing the undersupply to around 88 ha.

Table 11.2 Resultant Portfolio of Employment Land in Sheffield to 2031

Proposal	Number of Sites	Gross Site Area (ha)	Net Developable Area (ha)	Net Employment Area (ha)
Retain Current Employment Allocation – Un-assessed sites	60	49.77	49.77	49.77
Retain Current Employment Allocation – Assessed sites	57	175.41	143.43	143.43
Allocate vacant land within existing employment area for B-Class use	3	8.18	0	0
Employment land component of re-allocated Mixed Use sites	6	43.71	37.72	18.26
Existing Employment Land Portfolio	126	277.07	230.92	211.46
Potential New Employment Sites	5	7.27	4.69	4.69
Employment land component of Mixed-Use redevelopment at Nelson Mandela Building, Pond Street	1	0.27	0.23	0.09
Potential Employment Land Portfolio	6	7.54	4.92	4.78
De-allocate	4	5.89	5.14	5.14
Sites to be Excluded from Portfolio	4	5.89	5.14	5.14
TOTAL	136	290.5	240.98	221.38

11.23 Clearly, any site-specific recommendations contained within this document cannot be viewed in isolation. Recommendations will need to be taken forward and tested through the proper preparation of policy by SCC and subject to suitable consultation as part of its Local Plan preparation process.

SCC should identify additional areas of search where new employment sites could be accommodated. Such areas should correspond to areas of identified need and strong market demand to rebalance the future portfolio of employment sites to increase opportunities in the City.

11.24 Even with the addition of newly identified employment and mixed use sites, the adjusted portfolio recommended in Table 11.2 is still insufficient to meet Sheffield's employment land requirements over the plan period, and the next step for SCC is to identify some new locations in which to provide additional 'areas of search' where new employment sites could be accommodated.

11.25 As the sub-area analysis has revealed, the Lower and Upper Don Valleys, and to some extent the City Centre, are the main areas where the identified shortfall in employment land is most pronounced relative to demand, and suggests scope to increase the supply of employment land within these locations relative to land within Chapeltown/Ecclesfield in order to rebalance the portfolio of sites to towards those areas of stronger market demand.

11.26 In assembling a new portfolio of sites, a strategic approach should be adopted to manage the competing pressures on potential employment sites within Sheffield in order to re-balance the portfolio of employment (industrial and distribution) sites in favour of those areas with strong market demand whilst facilitating the development of additional Grade A office floorspace in the City Centre to support and sustain Sheffield's position as the premier office location in South Yorkshire in line with the Core Strategy approach.

11.27 Future allocations, or identified land, within potential areas of search should be clustered, rather than provided over a dispersed portfolio of sites, in order to provide a sufficient concentration of employment uses and achieve the critical mass required to secure the necessary investment, business infrastructure and occupier interest.

The Council should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth.

11.28 Alongside making new allocations and identifying appropriate areas of search for additional employment development, SCC should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth. Renewal and intensification

on older sites with available land should be encouraged to ensure that they contribute positively to meeting some of the City's employment land requirements, alongside perusing the strategy already adopted within the Core Strategy in order to increase opportunities within the City Centre for high quality office development and focus industrial and manufacturing uses in within the Upper and Lower Don Valleys.

11.29

With limited funding available for site servicing and remediation, regard should be had to the use of cross-subsidisation to bring forward employment sites. A number of other planning and economic development interventions could also significantly improve the level of development and premises renewal activity, including strengthened policy protection for B-class land, use of BID schemes, and engaging with land owners. A significant opportunity exists to harness funds associated with the Sheffield City Region LEP which could contribute to the delivery of unviable or constrained employment sites, as well as the fiscal incentives associated with the Enterprise Zone.

Appendix 1 **List of Consultees**

- Creative Sheffield
- Sheffield City Region Local Enterprise Zone
- South Yorkshire Passenger Transport Executive
- Crosthwaite Commercial
- CBRE
- BNP Paribas
- Knight Frank
- Fowler Sandford
- St Pauls (Developers)
- Henry Boot Developments
- Cordwell Developments
- Rotherham Metropolitan Borough Council
- Barnsley Metropolitan Borough Council
- Chesterfield Borough Council
- Doncaster Metropolitan Borough Council

Appendix 2 Definition of B Class Sectors

The method used for categorising the industrial employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

Experian Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco	0%	100%	0%
Textiles & Clothing	0%	100%	0%
Wood & Paper	0%	100%	0%
Printing and Recorded Media	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals	0%	100%	0%
Pharmaceuticals	0%	100%	0%
Non-Metallic Products	0%	100%	0%
Metal Products	0%	100%	0%
Computer & Electronic Products	0%	100%	0%
Machinery & Equipment	0%	100%	0%
Transport Equipment	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities	0%	70% ¹	0%
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	44% ²	0%
Wholesale	0%	22% ³	70% ⁴
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	67% ⁵
Air & Water Transport	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	26% ⁶	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10% ⁷	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Experian / NLP analysis

- 1 Sheffield City 2011 BRES (SIC 38 & 39) as % of Sections D (Electricity, gas, steam and air conditioning supply) and E (Water supply; sewerage, waste management and remediation activities).
- 2 Sheffield City 2011 BRES (SIC 43.22 to 43.39) as % of Specialised Construction Activities (SIC 43).
- 3 Sheffield City 2011 BRES (SIC 45.2 to 45.4) as % of (SIC 45 & 46).
- 4 Sheffield City 2011 BRES Wholesale, less SIC 45.11, 45.19 and car repair (above)
- 5 Sheffield City 2011 BRES (SIC 49.41, 52.10, 52.24, 52.29, 53.10, 53.20) as % of (SIC 49, 52 and 53)
- 6 Sheffield City 2011 BRES (SIC 82.1, 82.2, 82.3, 82.9) as % of (SIC 77, 78, 79, 80, 81, 82)
- 7 10% of Experian Public Administration & Defence total

Appendix 3 Site Proformas

EMPLOYMENT ALLOCATION:

**Corus and Outokumpu Works, Ford Lane
Manchester Road Hunshelf Road
Stocksbridge**

Reference

SCC02/N

9.37 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Offices, Laboratories, Steel stock yard and vacant land	
<i>Strategic Access</i>	1km from A616 to the north of the site	3
<i>Local Road Access</i>	B6085 Manchester Road is a narrow road running through residential areas.	2
<i>Proximity to urban areas, and access to labour & services</i>	An urban settlement to the north of Sheffield, with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Surrounding area open space, industrial and the town centre to the south. The consented scheme comprises a strategic regeneration of a substantially redundant site adjacent to the town centre. Uses are to include retail (supermarket and comparison shopping), offices and leisure.	2
<i>Site characteristics and development constraints</i>	Large flat site occupying the width of the valley bottom and falls partially within Flood Risk Zone 2. Development is constrained by ground conditions including contamination and as such grant funding may be required for any development.	1
<i>Market Attractiveness</i>	Wholly dependant to implementation of the consented scheme.	1
<i>Infrastructure</i>	The established infrastructure will be enhanced to accommodate the new development.	3
<i>Planning / Sustainability Comments</i>	The site falls within the Unitary Development Plan, under a General Industry Area, with no restrictions on employment uses. It is highlighted in the Core Strategy as a location for manufacturing, distribution, warehousing and other non-office businesses. A small part of the site is designated open space, however, there are no other planning policy restrictions or landscape designations.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Without the proposed enhancements to infrastructure necessary to facilitate the new development the poor road infrastructure and abnormal costs of development would make development for other employment uses unlikely in the foreseeable future.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 15

EMPLOYMENT ALLOCATION:

30 Atlas Way

Reference

New Site

0.58 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>		
<i>Strategic Access</i>		
<i>Local Road Access</i>		
<i>Proximity to urban areas, and access to labour & services</i>		
<i>Compatibility of adjoining uses</i>		
<i>Site characteristics and development constraints</i>		
<i>Market Attractiveness</i>		
<i>Planning / Sustainability Factors</i>	Full planning permission - 08/02325/FUL for 2,400 sq.m. mixed office / light industrial building.	
<i>Infrastructure</i>		
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>		

[Scoring: 5 = best, 1 = worst

TOTAL SCORE:

EXISTING EMPLOYMENT SITE

**Thorncliffe Park Estate Newton Chambers
Road Chapeltown**



Reference

New Site

Area (ha)

2.44 ha



Criteria	Comment	Score (out of 5)
Current Use		
Strategic Access		
Local Road Access		
Proximity to urban areas, and access to labour & services		
Compatibility of adjoining uses		
Site characteristics and development constraints		
Market Attractiveness		
Planning / Sustainability Factors	Full planning permission - 08/03467/FUL for Five storey office building (6,500 sq.m.), four storey 378 space car park and 3,300 sq.m. of 'hybrid' office/industrial units (Class B1/B2).	
Infrastructure		
Other Comments (i.e. ownership factors, barriers to development where available)		

FULLY DEVELOPED NOW WITH OWN

FOR EXISTING SITES ONLY

Type of Existing Use (B1/B2/B8 other)	
Existing Vacancy Levels	
Age of existing Premises (pre war; 1945-1970; 1970-90; 1990-00; post 2000)	
Condition of Existing Premises	
Amount of Development Land Available	
Potential for Alternative Employment Use	
Existing Occupiers	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:

Fully Developed Now Withdrawn

EMPLOYMENT ALLOCATION:**Upwell Street / Colliery Road (Victory Park)**

Reference

P00001**6.26 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Substantially vacant land part developed to the rear	
<i>Strategic Access</i>	1km from the M1 J34 North	4
<i>Local Road Access</i>	A6109 Brightside lane	4
<i>Proximity to urban areas, and access to labour & services</i>	Site within an urban area with good access to labour and services.	4
<i>Compatibility of adjoining uses</i>	Appropriate for B1/2/8	4
<i>Site characteristics and development constraints</i>	Large level and fully serviced site. The only constraint on the site relates to it being located within a Flood Risk Zone 2.	4
<i>Market Attractiveness</i>	Excellent	5
<i>Infrastructure</i>	Excellent and on site	5
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses. The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses (B1b, B1c, B2 and B8) within a Business and Industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p> <p>Sheffield City Council has indicated that full planning permission was granted in August 2007 for industrial/warehouse units. An alternative planning application for waste recovery facility was submitted in May 2008.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is a large level site ready for development, remediated and substantially fully serviced. No barriers to development.</p> <p>Ownership: Property Alliance Limited</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 30

EMPLOYMENT ALLOCATION:**Former ROM Site Meadowhall Road****Reference****P00005****4.4 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Manufacturing with small vacant area	
<i>Strategic Access</i>	Less than 1km from M1 J34 North	5
<i>Local Road Access</i>	A6109 Meadowhall Road	4
<i>Proximity to urban areas, and access to labour & services</i>	Within the urban area with very good access to labour and services	4
<i>Compatibility of adjoining uses</i>	Appropriate for B1/2/8	4
<i>Site characteristics and development constraints</i>	Level site with shared access. The whole site is within a Hazardous Installations - Consultation Zone and parts of the site falls within Flood Risk Zone 2 and Flood Risk Zone 3A.	2
<i>Market Attractiveness</i>	Moderate	3
<i>Infrastructure</i>	Established on site	4
<i>Planning / Sustainability Comments</i>	The Unitary Development Plan allocates the site within a Business Institution: Leisure Area, which excludes General Industry (B2), Warehousing and open storage (B8), Garage and transport depots and Scrapyards. There are no other planning policy restrictions or landscape designations.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a small portion of an otherwise fully developed manufacturing site likely to be of use for further expansion of the existing occupier operation.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**26**

EMPLOYMENT ALLOCATION:

Cannon Brewery

Reference

P00008

0.8



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Redundant brewery with storage	
<i>Strategic Access</i>	A61 Penistone Road	3
<i>Local Road Access</i>	Rutland Road and Neepsend Lane. Adequate for allocated use but this is triangle of junctions and the poor quality of road condition could be a restraining factor on development.	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Appropriate for redevelopment for a broad range of employment uses, including B1/2/8.	4
<i>Site characteristics and development constraints</i>	Large level site comprising partially derelict occasionally utilised brewery buildings. The whole site falls within Flood Zone Risk 2.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established in the area, though assume enhancement on site will be required.	2
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy key diagram identifies the site within the area for manufacturing, distribution, and warehousing and other non-office businesses in line with Policy CS5.</p> <p>The pre-submission Sheffield Local Plan Proposals Map designates the site as part of a wider Business Area, which supports the above uses but also allows residential to be developed across up to 40% of the Policy Area in suitable locations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	The extent of demolition required and possible contamination could compromise the viability of development in the medium to short term.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE:

20

EMPLOYMENT ALLOCATION:**Oakham Drive****Reference****P00015****1.07**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	A61 Penistone Road compromised by low level bridge.	3
<i>Local Road Access</i>	B6070 Rutland Road, low baring bridge (4.8m)	2
<i>Proximity to urban areas, and access to labour & services</i>	Within the urban area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Very Good	4
<i>Site characteristics and development constraints</i>	A sloping over grown site. The Sheffield Energy and Water Infrastructure Study shows that there is a 275kV cable under the site which may be expensive to relocate. No other obvious constraint on development for smaller industrial units.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Adequate for small scale industrial development.	3
<i>Planning / Sustainability Comments</i>	<p>The Core Strategy identifies the site as a location for manufacturing, distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for flexible uses within a General Employment Policy Area; this type of allocation is grouped after those with specific requirements.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	No significant barriers to development.	

[Scoring: 5 = best, 1 = worst**TOTAL SCORE:****21**

EMPLOYMENT ALLOCATION:**Parkwood Springs Business Park****Reference****P00016****3.38**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant though occupied by well established 'New Age' Travellers camp.	
<i>Strategic Access</i>	A61 Penistone Road difficult to access from site.	3
<i>Local Road Access</i>	Douglas Road Wallace Road extremely low bridge (3.4m).	1
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Compatible with B1 (manufacturing) and B2.	3
<i>Site characteristics and development constraints</i>	Steeply sloping site to which road infrastructure is heavily compromised. The whole site falls within a Hazardous Installation- Consultation Zone.	1
<i>Market Attractiveness</i>	Limited	1
<i>Infrastructure</i>	Poor	1
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a Business Area, preferred use B1. Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The Core Strategy highlights the site as a location for manufacturing, distribution, warehousing and other non-office businesses.</p> <p>The Sheffield Local Plan Proposals Map (pre-submission 2013) designates this area as part of the General Employment Area which gives flexibility for the above uses and also leisure uses subject to national policy.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>Theoretically suitable for employment use, but practically the sites challenging topography and poor access make it unlikely to be a viable development site for anything other than low impact marginal uses.</p> <p>Ownership: Sheffield City Council (BILS, 2006)</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**13**

EXISTING EMPLOYMENT SITE

Prospect Business Park Carlisle Street East

Reference

P00017

Area (ha)

6.5 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Demolition and ground works material processing and recycling	
<i>Strategic Access</i>	M1 J34 North over 2km away.	3
<i>Local Road Access</i>	B6083 Carlisle St East a long road running essentially all the way from the motorway to the fringe of the city largely carrying traffic destined for somewhere on the road.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Appropriate for B1 non-offices and B2/8 and other sui generis industrial processes.	2
<i>Site characteristics and development constraints</i>	Multi-level site with significant fall from back to front, which is the principle constraint on development.	1
<i>Market Attractiveness</i>	Limited	1
<i>Infrastructure</i>	Established services onsite, adequate only for the low intensity of current use.	2
<i>Planning / Sustainability Comments</i>	<p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses requiring B1b, B1c B2 and B8 uses within this Business and Industrial policy area.</p> <p>Part of the site is designated for local nature conservation. However, there are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is a fully operational waste recycling site the remediation would need to be undertaken. Compromises presented by level changes make it a difficult site to develop.</p> <p>The owner of the site is Martin Hague Plant.</p>	

FOR EXISTING SITES ONLY

<i>Type of Existing Use (B1/B2/B8 other)</i>	Sui generis waste recycling
<i>Existing Vacancy Levels</i>	nil
<i>Age of existing Premises (pre war; 1945-1970; 1970-90; 1990-00; post 2000)</i>	Plant and nominal buildings only
<i>Condition of Existing Premises</i>	N/A
<i>Amount of Development Land Available</i>	none
<i>Potential for Alternative Employment Use</i>	Limited
<i>Existing Occupiers</i>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:	15
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EMPLOYMENT ALLOCATION:

Spital Hill Employment Zone



Reference

P00022

1.2



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Derelict buildings, vacant land, vehicle repairs and others	
<i>Strategic Access</i>	A61 Inner Ring Road	4
<i>Local Road Access</i>	A6135 Spital Hill and Brunswick Road (Residential)	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban site adjacent to but outside Inner Ring Road with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Incompatible	2
<i>Site characteristics and development constraints</i>	Derelict and run down fire damaged property with haphazard occupation by low value businesses. Steeply sloping and on multiple levels.	1
<i>Market Attractiveness</i>	Limited	1
<i>Infrastructure</i>	Good road infrastructure, inadequate services on site to support significant regeneration or development.	2
<i>Planning / Sustainability Comments</i>	<p>The site is identified in the Unitary Development Plan as a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for flexible uses within a Business Policy Area.</p> <p>There is a designated Grade II Listed building/structure on this site. However, there are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>Other than possibly along the Spital Hill periphery this site is unsuitable for employment creating uses and more suited to residential development and compatible community uses.</p> <p>In multiple ownership.</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 15

EMPLOYMENT ALLOCATION:

Stanley Tools Rutland Road

Reference

P00026

1.1



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant offices and manufacture	
<i>Strategic Access</i>	A61 Penistone Road,	3
<i>Local Road Access</i>	Rutland Road low bridge (4.8m)	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	Good including light manufacture, storage, trade counter and motor repairs.	3
<i>Site characteristics and development constraints</i>	Sloping site comprising partially derelict manufacturing and office buildings accessed from steep secondary road	1
<i>Market Attractiveness</i>	Limited for employment creating uses. On the B6070 which is a busy route between Walkley and the Northern General Hospital.	1
<i>Infrastructure</i>	Assume only adequate for previous use. See above comment regarding road access.	2
<i>Planning / Sustainability Comments</i>	<p>The site is identified in the Unitary Development Plan as a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage) and unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates site for flexible uses within a Flexible Use Area.</p> <p>Planning permission was granted in December 2008 for 172 dwellings and 829 sq.m. for offices which was not implemented within 3 years and has now expired.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>The nature of this site and poor quality access make it unsuitable for any employment creating use other than small scale B1 light industry and other factors make this unlikely other than as part of a mixed use scheme to include residential development similar to the present planning consent.</p> <p>Ownership: Fitzgerald</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 15

EMPLOYMENT ALLOCATION:

Carver Lane Holly Street

Reference

P00043

0.6



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Car parking	
<i>Strategic Access</i>	A61 Inner Ring Road	4
<i>Local Road Access</i>	West St which is a busy road along which the Super Tram runs	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban city centre site with very good access to labour and services	5
<i>Compatibility of adjoining uses</i>	Appropriate for broad range of employment creating uses excluding B2/8	4
<i>Site characteristics and development constraints</i>	Level site in accessible location beneficially used for car parking. No constraints to development	4
<i>Market Attractiveness</i>	Very Good	4
<i>Infrastructure</i>	Established adjacent but assume none to site that would be adequate for significant development	3
<i>Planning / Sustainability Comments</i>	<p>Within the Unitary Development Plan the site is located in the Central Shopping Area. This allocation seeks to exclude under this policy: General industry (B2), Warehouses and open storage (B8), Car showrooms, Garage and transport depots, Petrol filling stations and Scrapyards are unacceptable forms of development. It is also designated within the City Centre Housing Priority Zone where housing (C3), will be expected to form a significant proportion of any new development.</p> <p>The Core Strategy highlights the site within the Core Retail Area. The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for offices within a business policy area.</p> <p>The site is located within a designated Conservation area; however there are no other landscape designations or planning policy requirements.</p>	

<i>ther Comments (i.e. ownership factors, barriers to development where available)</i>	This is a well located site which though heavily used for car parking as a temporary measure would be readily brought into use for development of employment creating uses including B1 A1/2/3/4/5 C1 D1 Leisure. Ownership: Sheffield City Council/Private (2006)
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[Scoring: 5 = best, 1 = worst

TOTAL SCORE:	27
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EMPLOYMENT ALLOCATION:

Castlegate (Exchange Place)

Reference

P00045

0.24



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Temporary surface level Car park.	
<i>Strategic Access</i>	Less than 1km from Sheffield Parkway. This site is also close to the coach station, the train station and supertram.	4
<i>Local Road Access</i>	Exchange Street narrow road, with access from one end only.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban city centre. Very good access to labour and services	4
<i>Compatibility of adjoining uses</i>	Adjoining uses compatible with B1 offices, A1/2/3/4/5 and present use	5
<i>Site characteristics and development constraints</i>	Prominent small City Centre site heavily used for parking in association with markets. This situation will change on relocation of the markets. Parts of the site fall within Flood Risk Zone 2.	3
<i>Market Attractiveness</i>	Very good for broad range of employment uses.	4
<i>Infrastructure</i>	Well established	4
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within the Business Area, preferred use B1. Unacceptable uses include: Other shops (A1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The Core Strategy Policy CS75c highlights the site as a Gateway Location.</p> <p>There is also a Grade II listed building on the otherside of Exchange Place (Sheffield united Gas Light Company offices).</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for office uses within an office priority area.</p> <p>Outline Planning Permission for 3700 sq.m. offices of B1 Office.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a prominent site in a location that makes it suitable for a broad range of alternative development uses. Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 27

EMPLOYMENT ALLOCATION:

Castlegate Commercial St / Broad Street

Reference

P00045

0.2



Criteria	Comment	Score (out of 5)
Current Use	Landscaped open space	
Strategic Access	Less than 1km to Castle Square, with access to SuperTram stop with connections to the Park and Ride and the train station. In addition to the train station it is located near to the coach station and the Parkway.	4
Local Road Access	Broad Street	4
Proximity to urban areas, and access to labour & services	Urban City Centre site.	5
Compatibility of adjoining uses	Appropriate for B1 offices, A1/2/3/4/5, C1 and D2	4
Site characteristics and development constraints	Small accessible site beneficially used to enhance present environment. The whole of the site is in Flood Risk Zone 3A.	3
Market Attractiveness	Good	3
Infrastructure	Established	4
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site within a Business Area, preferred use B1. Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for office uses within an office priority area. There are no other planning policy restrictions.</p> <p>There is also a Grade II listed building opposite the site (Sheffield United Gas Light Company offices).</p> <p>Current permission is for temporary landscaping prior to redevelopment. Outline Planning Permission for 10500 sq.m. office space.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	This City Centre site is suitable for a broad range of employment creating uses. Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:

27

EMPLOYMENT ALLOCATION:

Doncaster St / Shepherd St

Reference

P00057

1.1 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Largely vacant site	
<i>Strategic Access</i>	Excellent adjacent to A61 Shalesmoor	5
<i>Local Road Access</i>	As above	5
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with excellent access to labour and services	5
<i>Compatibility of adjoining uses</i>	Suitable for use compatible with adjacent uses including B1, Residential and Hotel	4
<i>Site characteristics and development constraints</i>	Level partly cleared, part still developed, site split by a road in a very prominent location.	4
<i>Market Attractiveness</i>	Very Good	4
<i>Infrastructure</i>	Excellent to site but not on site	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a Business Area, preferred use B1. Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The Core Strategy highlights the site within a transition area where manufacturing in City Centre should not expand where it would detract from the regeneration of the centre and it will be encouraged to relocate.</p> <p>Part of the site does fall within a designated conservation area; however, there are no other landscape designations or planning policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is an important prominent site suitable for a broad range of alternative uses and employment creating uses suitable for a 'gateway' site.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 30

EXISTING EMPLOYMENT SITE

Egerton Street Hanover Way

Reference

P00060

Area (ha)

0.38



Criteria	Comment	Score (out of 5)
Current Use	Manufacturing and storage	
Strategic Access	Site is on the A61 Ring Road	4
Local Road Access	Milton Street and Edgerton Street which is quite narrow.	3
Proximity to urban areas, and access to labour & services	Urban edge of City Centre with very good access to labour and services.	5
Compatibility of adjoining uses	Appropriate including light manufacturing, storage and residential.	3
Site characteristics and development constraints	Level with 100% site coverage	2
Market Attractiveness	Reasonable for continuation of uses similar to present	3
Infrastructure	Established on site for present use	3
Planning / Sustainability Comments	<p>The site is allocated in the Unitary Development Plan within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The Core Strategy Policy CS76e highlights the site within an area of transition, where manufacturing in City Centre should not expand if it would detract from the regeneration of the centre. Such uses are will be encouraged to relocate.</p> <p>The emerging Local Plan, Proposal Maps (2013) allocates the site within an Business Area, which highlight B2 and B8 as unacceptable uses.</p> <p>There are a number of Grade II listings adjacent to the site: Number 94,96 and 100 on Milton Street in addition to the Beehiveworks.</p> <p>The block in the site to north west of Edgerton Street currently has a decision pending on an application for student accommodation.</p> <p>The site is also highlighted within the SHLAA as being deliverable/developable for housing over the Plan Period.</p>	
Other Comments (i.e. ownership factors,	The site is in two parts and ownerships. Part fully utilised for the manufacture of marking tools and partly now used for storage.	

<i>barriers to development where available)</i>	Existing value of manufacturing space. The space and price paid for buildings now used for storage may compromise development. Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.
FOR EXISTING SITES ONLY	
<i>Type of Existing Use (B1/B2/B8 other)</i>	B1 B8
<i>Existing Vacancy Levels</i>	nil
<i>Age of existing Premises (pre war; 1945-1970; 1970-90; 1990-00; post 2000)</i>	1945 - 1970
<i>Condition of Existing Premises</i>	Part good part poor
<i>Amount of Development Land Available</i>	none
<i>Potential for Alternative Employment Use</i>	Modest see earlier comment
<i>Existing Occupiers</i>	Pryor Marking and Stokes Tiles

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:	23
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EXISTING EMPLOYMENT SITE

Furnival Square Matilda Way

Reference

P00065

Area (ha)

0.96



Criteria	Comment	Score (out of 5)
Current Use	Mixed, offices, retail, leisure and car parking	
Strategic Access	A61 Inner Ring Road	4
Local Road Access	Eyre St	4
Proximity to urban areas, and access to labour & services	Urban city centre with very good access to labour and services	5
Compatibility of adjoining uses	Appropriate to present uses	4
Site characteristics and development constraints	Large city centre site in prominent location and area of recent development. Existing property values likely to be a constraint on development.	3
Market Attractiveness	Limited attractiveness for employment on the remainder of the site due to revenue earning multi-storey car park.	2
Infrastructure	Established	4
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site with the Central Shopping Area under this policy: General industry (B2), Warehouses and open storage (B8), Car showrooms, Garage and transport depots, Petrol filling stations and Scrapyards are unacceptable forms of development.</p> <p>The Core Strategy allocates the site with a Priority Office Area.</p> <p>The emerging Local Plan, Proposal Maps (2013) allocates 60% of the site within Central Shopping Area and the other 40% within the Priority Office Area.</p> <p>The site currently has to extant planning permissions Ref: 12/0277/FUL Use of basement and part of ground floor as gym (use class D2) or restaurant/café (use class A3) and division of A1 retail at ground and first floor into two retail units, plus external works including glazed frontage on the corner of Matilda Street/Matilda Way (amended description) and Ref: 11/02250/FUL Partial demolition of buildings, retention of facades to Nos 7-9 The Moor, erection of three-storey mixed use development comprising of A1(Shops), A2 (Financial and Professional Services), A3 (Restaurants and Cafes) uses, provision of a digital screen and associated infrastructure and ancillary facilities.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	Notwithstanding the empty spaces within the buildings on this site, the present land values are likely to be an insurmountable barrier to redevelopment other than as part of a major publicly funder regeneration project for the foreseeable. Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 26

EXISTING EMPLOYMENT SITE

Hallam Lane

Reference

P00068

Area (ha)

0.616



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Mixed Car repairs, public house, manufacturer	
<i>Strategic Access</i>	A61 Inner Ring Road	4
<i>Local Road Access</i>	Eyre Street	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban City centre site with very good access to labour and services.	5
<i>Compatibility of adjoining uses</i>	Appropriate	4
<i>Site characteristics and development constraints</i>	Level, fully developed and occupied site. Narrow established roads	2
<i>Market Attractiveness</i>	Limited	2
<i>Infrastructure</i>	Established and adequate for present uses	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site with a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage) and unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards. There are no other planning policy restrictions.</p> <p>The Core Strategy Policy CS76f highlights the site within an area of transition, where manufacturing in City Centre should not expand if it would detract from the regeneration of the centre. Such uses are will be encouraged to relocate.</p> <p>The emerging Local Plan, Proposal Maps (2013) allocates the site within a Business Area.</p> <p>The site is also highlighted within the SHLAA.</p> <p>Whole site sits within a designated Conservation area.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Multiple ownerships and uses. All buildings in beneficial use. Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 21

EMPLOYMENT ALLOCATION:

In front of Midland Station

Reference

P00070

0.6



Criteria	Comment	Score (out of 5)
Current Use	Vacant site, former British Rail administrative offices	
Strategic Access	Site on Sheaf Street (A61)	4
Local Road Access	Cross Turner St poor access	2
Proximity to urban areas, and access to labour & services	Urban city centre site	5
Compatibility of adjoining uses	Appropriate for broad range of employment creating alternative uses.	4
Site characteristics and development constraints	Level, prominent site of good size for city centre possibly constrained by compromised access. Part of the site is within Flood Risk Zone 2 and 3A	3
Market Attractiveness	Good subject to access improvement	3
Infrastructure	Established	3
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site in a Business Area, preferred use B1. Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for office uses within a priority office area.</p> <p>The site is also highlighted within the SHLAA as being deliverable/developable for housing over the Plan Period.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>This is a good sized site in a prominent location but access to it is presently shared with the Railway Station traffic which itself can be compromised. Improvement to an otherwise strong site would be required.</p> <p>Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.</p> <p>Ownership Homes and Communities Agency.</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 24

EMPLOYMENT ALLOCATION:

Land and Buildings Hanover Way Milton Street

Reference

P00073

0.51



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land. Former car sales and repairs	
<i>Strategic Access</i>	Site backs on to the A61 Ring Road	5
<i>Local Road Access</i>	Milton Street and Hodgson Street	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban edge of city centre site	5
<i>Compatibility of adjoining uses</i>	Appropriate for broad range of employment creating uses though and residential	3
<i>Site characteristics and development constraints</i>	Level prominent site on the ring road but with no direct access there from.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established to adjacent roads but assume none to site suitable for significant development.	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site in a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for offices and housing uses within a Business and Central Housing policy area, where mixed uses developments are encouraged.</p> <p>The site is highlighted within Sheffield City Council's SHLAA.</p> <p>The site has previously benefited from planning permission for, 1,000 sq.m. of mixed A1, A3, and D2 uses, 1,500 sq.m. B1 office uses with 233 apartments and 9 live/work units. (REF: 03/03677/FUL) This permission expired in October 2009.</p> <p>Sheffield City Council's considered the site as a retail warehouse allocation, however, Highways advised against because of problems with traffic congestion and access.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where)</i>	<p>This site was speculatively bought towards the end of the recent property boom. Major write down in value is likely to be required before redevelopment is possible.</p> <p>The site has recently changed ownership.</p>	

<i>available)</i>	Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.
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[Scoring: 5 = best, 1 = worst

TOTAL SCORE:	25
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EMPLOYMENT ALLOCATION:

Nelson Mandela Building Pond Street

Reference

P00083

0.27



Criteria	Comment	Score (out of 5)
Current Use	Vacant land	
Strategic Access	Site on Sheaf Street	4
Local Road Access	Good access on Pond street and Howard Street	4
Proximity to urban areas, and access to labour & services	Urban city centre site with very good access to labour and services	5
Compatibility of adjoining uses	Suitable for broad range of employment creating uses inc B1, A1/2/3/4/5 C1,D2	4
Site characteristics and development constraints	Level, irregular shaped, prominent site with no known development constraints	4
Market Attractiveness	Very Good	4
Infrastructure	Established adjacent to site	4
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates this site as an area of Open Space.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) preferred use for the site is B1a Office uses. The site also sits in a Business policy area.</p> <p>Outline Permission was previously granted for 9,700 sq.m. B1 Offices, 200 bed Hotel (12,530 sq.m.) and 528 sq.m. of A1 retail. (REF: 07/02073/OUT) This permission has now expired.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>This is a well located and prominent site for which there will be ongoing demand.</p> <p>Ownership: Homes and Communities Agency.</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE:

29

EXISTING EMPLOYMENT SITE

Pitsmoor Rd/Chatham St/Swinton St

Reference

P00089

Area (ha)

2.582



Criteria	Comment	Score (out of 5)
Current Use	Vacant land, car parking, car wash and repair	
Strategic Access	Close to A61 Inner Ring Road but poor access.	3
Local Road Access	The site is difficult to access from Mowbray St.	2
Proximity to urban areas, and access to labour & services	Urban with very good access to labour and services	5
Compatibility of adjoining uses	Adjoining uses are separated from the site by railway and major road infrastructure.	2
Site characteristics and development constraints	Part steeply sloping with development platforms. The complex road infrastructure and access compromises the development of the site at present. The whole site falls within Flood Risk Zone 2,	1
Market Attractiveness	Limited	1
Infrastructure	Established in adjacent roads but assume insufficient service capacity for significant regeneration and development.	2
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates this site within a General Industry Area without special industries, which restricts Open storage (B8) and Scrapyards uses with these allocated areas.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates site for within a Flexible use policy area with no preferred uses. Unaccepted uses include B2 and B8.</p> <p>Sheffield City Council highlights this site within the SHLAA.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>This is a prominent but somewhat inaccessible site. Suitable for employment creating uses at a small scale and to include B1 (light manufacture) only. Otherwise suitable for residential development</p> <p>Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.</p> <p>Ownership National Grid and Sheffield City Council</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 16

EMPLOYMENT ALLOCATION:

**Sheaf Valley Digital Campus Site Phase 2
Pond St**

Reference

P00100

0.39



Criteria	Comment	Score (out of 5)
Current Use	Vacant Site	
Strategic Access	Site backs on to Sheaf Street	4
Local Road Access	Pond Hill has reasonable access to Sheaf Street.	3
Proximity to urban areas, and access to labour & services	Urban city centre.	5
Compatibility of adjoining uses	Appropriate for broad range of employment creating uses	4
Site characteristics and development constraints	Prominent level vacant site part of which sits within Flood Risk Zone 3A. No other known constraints.	3
Market Attractiveness	Very good	4
Infrastructure	Established	4
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site within a Business Institution: Leisure Area, which excludes General Industry (B2), Warehousing and open storage (B8), Garage and transport depots and Scrapyards.</p> <p>The Core Strategy identifies the site as being located within a location for office development. The emerging Local Plan, City Policies and Sites DPD (2013) also allocates the site for office uses within a priority office policy area. There are no other planning policy restrictions.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	Ownership: Homes and Communities Agency.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 27

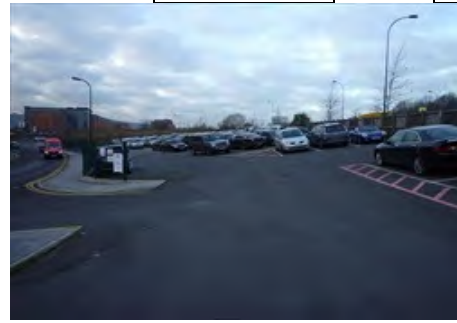
EMPLOYMENT ALLOCATION:

Spitalfields Brunswick Road

Reference

P00110

0.77



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Car parking and vacant land	
<i>Strategic Access</i>	Large proportion of the site fronts onto the A61 Inner Ring Road	4
<i>Local Road Access</i>	Nursery St off A61	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban city centre site with very good access to labour and services	5
<i>Compatibility of adjoining uses</i>	These include offices, major road infrastructure and manufacture and this use is compatible with these.	4
<i>Site characteristics and development constraints</i>	Gently sloping and part of the site is in Flood Risk Zone 2 and another part is within zone 3A.	3
<i>Market Attractiveness</i>	Very Good	4
<i>Infrastructure</i>	Established in the area but assume none to site sufficient for significant development	4
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this area for General Industry without special industries, which outlines that Open storage (B8) and scrapyards are not acceptable development under this policy.</p> <p>The Core Strategy CS6c highlights the site within a transition area where manufacturing in City Centre should not expand if it would detract from the regeneration of the centre.</p> <p>The site is also adjacent to a conservation area and it opposite Aizlewood Mill Grade II listed building.</p> <p>Part of the site is included within Sheffield City Council's SHLAA.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is a prominent accessible site beneficially used as car parking for adjacent offices, which could act as a future constraint on the site. The area of vacant land would be suitable for a small bespoke development for a range of employment creating uses except B2/8.</p> <p>Where City Centre sites are considered for alternative uses (such as retail), such sites should be considered pragmatically and policies adopted with a flexible approach where, for example, retail uses with office floorspace above will help to facilitate the desired employment uses.</p> <p>Ownership in 2006 Sheffield City Council/Unregistered (2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 28

EXISTING EMPLOYMENT SITE

West Bar Triangle

Reference

P00121

Area (ha)

2.63



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Car parking, offices, manufacturing, car hire, vacant land and roads	
<i>Strategic Access</i>	Very good access to A61 Inner Ring Road	4
<i>Local Road Access</i>	A number of local road directly off on to A61	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban city centre site with very good access to labour and services	5
<i>Compatibility of adjoining uses</i>	Appropriate, major road infrastructure, housing, Combined Courts, light manufacture and 'big block' offices.	4
<i>Site characteristics and development constraints</i>	Large level site at a strategic location on the Inner Ring Road. Multiple ownership. Part of the site is in Flood Risk Zone 2 and another part is within Flood Risk Zone 3A.	3
<i>Market Attractiveness</i>	Very Good	4
<i>Infrastructure</i>	Established for former uses but redevelopment would require major enhancement	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this area for General Industry without special industries, which outlines that Open storage (B8) and Scrapyards are not acceptable development under this policy.</p> <p>The Core Strategy highlights the site within an area of transition area where manufacturing in City Centre should not expand where it would detract from the regeneration of the centre and it will be encouraged to relocate.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) identifies the preferred land use as office within a business policy area. There are no further planning policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a very important site suitable for major regeneration and development to provide a mix of uses appropriate to the location and in line with the existing current planning masterplan. In Multiple ownership.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 27

EMPLOYMENT ALLOCATION:

Weedon Street / Meadowhall Way

Reference

P00127

25 ha



Criteria	Comment	Score (out of 5)
Current Use	Vacant site including derelict buildings	
Strategic Access	The site is within 1km of the M1 J34 North and South	5
Local Road Access	A6178 Sheffield Road and A6109 Meadowhall Road offer excellent access.	5
Proximity to urban areas, and access to labour & services	Urban area with excellent access to labour and services.	5
Compatibility of adjoining uses	Dominant adjoining use is A1 plus car sales and B1/2. Suitable for very broad range of employment creating uses and residential.	5
Site characteristics and development constraints	Large important level site largely cleared for development. Part of the site falls in Flood Risk Zone 2. Subject to ground conditions and demolition specification no other known development constraints.	4
Market Attractiveness	Excellent	3
Infrastructure	Well established road and service to but no long on site	4
Planning / Sustainability Comments	<p>With the Unitary Development Plan this site falls within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A I) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The Core Strategy allocates the site as a location for office development. The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site within a Business policy area, for flexible uses, with no required use. There are no further planning policy restrictions.</p> <p>Part of this site is designated for local nature conservation, another part falls within a designated Wildlife Corridor. There are no other landscape or policy designations.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) outlines that the site has outline planning permission for a mixed-use development, including mainly business (60 - 120,000 sq.m.) and residential uses (800 to 1300 units) and a cluster of neighbourhood centre uses; due to its complexity the permission is valid until May 2019. The planning consent specifies a wide range of measures to deliver infrastructure and services, including transport (including contribution to the Tinsley Link) and a strategy to remedy past industrial contamination. Also, contributions would be made to travel planning, community facilities, open space/play and education. Part of the site also has planning permission for a car showroom.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>This is a very important strategic site suitable for a very broad range of development including those that are employment creating. The size of the site suggests that piecemeal development will be required to an adopted masterplan in line with current consent.</p> <p>Ownership: British Land and YWA (BILS, 2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE:

31

EMPLOYMENT ALLOCATION:

Alsing Road Meadowhall Sheffield

Reference

P00129

2.79 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Car parking	
<i>Strategic Access</i>	Less than 1km form M1J 34 north	5
<i>Local Road Access</i>	Excellent access on A6109 Meadowhall Road	5
<i>Proximity to urban areas, and access to labour & services</i>	Urban area good access to labour and services	4
<i>Compatibility of adjoining uses</i>	Very good, adjoining uses include B1/2/ A1 suitable for B1/2/8 A1 and other employment creating uses.	4
<i>Site characteristics and development constraints</i>	Large level site hard surfaced for overflow and temporary car parking. The whole site is in Flood Risk Zone 3B. Subject to ground conditions no other known development constraints. Proximity of sewage treatment plant	2
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Good well established road and service infrastructure	3
<i>Planning / Sustainability Comments</i>	The Unitary Development Plan allocates this site as part of the Regional Shopping Centre. The emerging Local Plan, City Policies and Sites DPD (2013) allocates this site for flexible uses within a general employment policy area. There are no further landscape or policy designations.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Proposed location for HS2 Rail Station Ownership: British Land	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE:

26

EMPLOYMENT ALLOCATION:**Rear of Davy McKee Prince of Wales Road**

Reference

P00136**2.1 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Largely Vacant Land	
<i>Strategic Access</i>	Over 1km from A57 Sheffield Parkway, with difficult access	3
<i>Local Road Access</i>	A6102 Prince of Wales Road, through a residential area	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	At the interface with heavy industry and residential estate suitable for B1/8	3
<i>Site characteristics and development constraints</i>	NOT PERSONALLY INSPECTED. Land locked	2
<i>Market Attractiveness</i>	Limited due to land-locked situation	1
<i>Infrastructure</i>	Given existing user one can assume a reasonable level of infrastructure to adjacent site but none on site. No access other than through adjacent site.	1
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this area for General Industry without special industries, which outlines that Open storage(B8) and Scrapyards are not acceptable development under this policy.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses including B1b, B1c, B2 and B8 where appropriate within a business and industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Ownership: David McKee	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**16**

EMPLOYMENT ALLOCATION:

Barley Wood Road

Reference

P00137

0.9 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant overgrown site	
<i>Strategic Access</i>	A6102 Greenland Road gives good access to M1 but is over 2km away.	3
<i>Local Road Access</i>	Barley Wood Road is a cul-de-sac containing a residential use.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	Good for B1/2/8 and other sui generis industrial processes.	3
<i>Site characteristics and development constraints</i>	Elevated site at the end of a short cul-de-sac. Barley Wood Road is narrow but very short. Topography will favour smaller units.	2
<i>Market Attractiveness</i>	Low	1
<i>Infrastructure</i>	None on site adequate provision adjacent	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	A quiet position and undoubtedly the topography of the site will compromise development but otherwise no known barriers to development, other than possibly ground conditions and or contamination.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE:

17

EMPLOYMENT ALLOCATION:**Betafence Sheffield Road**

Reference

P00138**5.15 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant site	
<i>Strategic Access</i>	1km from the M1 J34 South	5
<i>Local Road Access</i>	Good access via A6178, Sheffield Road	5
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with excellent access to labour and services	5
<i>Compatibility of adjoining uses</i>	Adjoining uses include car sales, A1 and B1/2. Compatible with these and other employment creating uses.	4
<i>Site characteristics and development constraints</i>	Cleared level site and subject to ground conditions no known development constraints.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Well established road and services to site but removed from site as part of demolition clearance.	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates area for Business or Industry uses required uses include research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial / processing uses) or warehouses and open storage (B8), as appropriate, within a Business and industry policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a large and important development opportunity.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**28**

EMPLOYMENT ALLOCATION:

Broadoaks

Reference

P00140

Area (ha)

0.6



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant, overgrown	
<i>Strategic Access</i>	Attercliffe Common A6178, Staniforth Road B6200, Arterial and secondary roads.	3
<i>Local Road Access</i>	Constricted roads affording access to individual locations only.	2
<i>Proximity to urban areas, and access to labour & services</i>	Within 1 km of residential areas to the east and of the city.	3
<i>Compatibility of adjoining uses</i>	Adjoining land use exclusively industrial.	3
<i>Site characteristics and development constraints</i>	Broadly rectangular site on multiple levels adjacent to railway.	2
<i>Market Attractiveness</i>	Limited principally due to challenging topography.	2
<i>Infrastructure</i>	Site not serviced. Fronts secondary road within which there are all main services.	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a Mixed Use Area. The Core Strategy allocates the site as a location for manufacturing, distribution, warehousing and other Non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates land for industry uses which include general industrial (B2 or other, unclassified industrial/processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Principal barrier to development is the topography and road access. Suitable for low value dirty uses.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 18

EXISTING EMPLOYMENT SITE
Broadlands / Lumley Street

Reference
P00141

Area (ha)
2.5



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Waste management and vacant land	
<i>Strategic Access</i>	Sheffield Parkway A57 is less than 1km away, however, there is a low level bridge (4.7m) in between.	3
<i>Local Road Access</i>	Bernard Road has a low level bridge (4.7m), Effingham Road, Lumley Street.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Appropriate for present use. Surrounding uses include incinerator plant, railway, mixed industry and manufacturing.	4
<i>Site characteristics and development constraints</i>	Level, linear, elevated site.	3
<i>Market Attractiveness</i>	Good for expansion of present use.	3
<i>Infrastructure</i>	Established for existing use and assume adequate for expansion thereof	4
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing, distribution, warehousing and other non-office businesses. The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for waste management in a waste management policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This site is substantially developed and the remainder is suitable for an expansion of or complementary use.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 23

EMPLOYMENT ALLOCATION:

Calor Site Shepcote Lane Sheffield

Reference

P00143

1.5 ha



Criteria	Comment	Score (out of 5)
Current Use	Vacant Land	
Strategic Access	1km to M1 J34 South	5
Local Road Access	This site is accessed off the A631 Shepcote Lane which runs directly from J34S .	3
Proximity to urban areas, and access to labour & services	Urban area with access to labour and services	3
Compatibility of adjoining uses	Very good for B1/2/8	4
Site characteristics and development constraints	Large broadly level site substantially overgrown. The whole site is within a Hazardous Installation - Consultation Zone. No other known development constraints subject to ground conditions including contamination.	3
Market Attractiveness	Good	3
Infrastructure	The established services and infrastructure on the road if not to the site itself, are suitable for redevelopment.	3
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage) and unacceptable uses include: Other shops (A I) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks and Scrapyards.</p> <p>The Core Strategy identifies the site as being a location for manufacturing, distribution, warehousing and other Non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area.</p> <p>There are no further landscape or planning policy restrictions.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>This is an infill plot that all other considerations aside should be attractive and suitable for employment uses B1/2/8. Subject to points above no known barriers to development.</p> <p>Ownership: Gas and Hire Ltd (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 24

EMPLOYMENT ALLOCATION:**Catley Road****Reference****P00145****0.6 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Stables paddock and ménage	
<i>Strategic Access</i>	From J34S via the A631 Shepcote Lane and A6102 Greenland Road.	3
<i>Local Road Access</i>	Catley Road and Coleford Road both constrained by cars parked on side of the road.	3
<i>Proximity to urban areas, and access to labour & services</i>	Fringe industrial and open space including golf course. Good access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Compatible with for B1/2/8	3
<i>Site characteristics and development constraints</i>	Sloping site adjacent being the last undeveloped plot on an industrial estate. The topography of the site makes it unsuitable for large footprint development.	2
<i>Market Attractiveness</i>	Moderate	2
<i>Infrastructure</i>	Cately Road is narrow for an industrial estate road and susceptible to blocking whilst vehicles manoeuvre, load and unload. Established services in the roads.	2
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy identifies the site as a location for manufacturing, distribution, warehousing and other Non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Despite the narrowness of Catley and Coleford Roads strategic roads are good and this is a well established mixed industrial area. Subject to the comments above no known barrier to development.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**18**

EMPLOYMENT ALLOCATION:

Faraday Road / Trent Street

Reference

P00153

0.78



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant previously developed site	
<i>Strategic Access</i>	Attercliffe Common A6178 is a main arterial route carrying a high volume of mixed traffic.	3
<i>Local Road Access</i>	Constricted servicing specific sites only	2
<i>Proximity to urban areas, and access to labour & services</i>	Within 2 km of residential areas to the east of the city centre	3
<i>Compatibility of adjoining uses</i>	Good, light to heavy manufacture, open storage.	4
<i>Site characteristics and development constraints</i>	The site is enclosed by the perimeter walls that formed the built structure of the original industrial user now demolished. Level and hard surfaced for the most part. The whole site is within a Flood Risk Zone 2.	3
<i>Market Attractiveness</i>	Reasonable for low value land use industry.	2
<i>Infrastructure</i>	Assume no services to site but adequate provision in the road to meet all anticipated uses.	2
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and Scrapyards are not acceptable development under this policy.</p> <p>The Core Strategy allocates the site as a location for manufacturing, distribution, warehousing and other Non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>Anticipate that the site will be contaminated though this may not be a significant barrier to lower value land uses. There may be below ground infrastructure from the previous use.</p> <p>Ownership: Emma Harrison</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 19

EMPLOYMENT ALLOCATION:**Former Asda site Orgreave Place**

Reference

P00155**1.16**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	2km to the A630 Sheffield Parkway	4
<i>Local Road Access</i>	B6066 Rotherham Road and B6200 Handsworth Road. Both good roads carrying a high volume of traffic.	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area at the interface between an industrial estate and residential estate with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Compatible with B1/2/8 uses	3
<i>Site characteristics and development constraints</i>	Broadly level site remediated and ready for development. Though local roads are good the site is some distance from strategic roads.	4
<i>Market Attractiveness</i>	Moderate/good	3
<i>Infrastructure</i>	Established services in the roads, none to site. Local road access compromised.	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and scrapyards are not acceptable development under this policy.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. The required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>Notwithstanding the slight disadvantage of the distance from strategic roads this is a good level site with no other barrier to development and suitable for a broad range of employment uses.</p> <p>Ownership: Ackroyd and Abbott</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**24**

EMPLOYMENT ALLOCATION:**Scaffold Yard Orgreave Place****Reference****P00156****0.51 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant Land	
<i>Strategic Access</i>	2km to A630 Sheffield Parkway	4
<i>Local Road Access</i>	B6066 Rotherham Road and B6200 Handsworth Road. Both good roads, however, carry a high volume of traffic.	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area. Fringe of popular industrial estate with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	B1/2/8	3
<i>Site characteristics and development constraints</i>	Broadly level, previously developed but remediation specification unknown.	3
<i>Market Attractiveness</i>	Moderate	3
<i>Infrastructure</i>	Services all established in the road assume none on site. Local road access is a slight compromise.	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and scrapyards are not acceptable development under this policy.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. The required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Notwithstanding the slight disadvantage of distance form strategic road network this is a popular industrial estate.	

[Scoring: 5 = best, 1 = worst**TOTAL SCORE:****23**

EMPLOYMENT ALLOCATION:**Former Dr John Worrall School Attercliffe**

Reference

P00160**0.7 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	Over 2km away from M1 J34 South	3
<i>Local Road Access</i>	A6083 Attercliffe Common a major arterial route which carries a high volume of mixed traffic.	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Good and suitable for broad range of employment uses including B1/2/8 Specialist retail e.g. engineering supplies, trade counter, car or commercial vehicle sales or hire etc	3
<i>Site characteristics and development constraints</i>	Broadly level site, cleared and ready for development, however, part of the site is within Flood Risk Zone 2. With no other known development constraints subject to ground conditions including contamination.	3
<i>Market Attractiveness</i>	Moderate to good	3
<i>Infrastructure</i>	Established in the area and adjacent roads.	2
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions, or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>		

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**21**

EMPLOYMENT ALLOCATION:**Former Sheffield Tipper's Site Sheffield Road****Reference****P00164****0.93 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	Less than 1km from M1 J34 south.	5
<i>Local Road Access</i>	Good access via A6178 Sheffield Road.	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services.	4
<i>Compatibility of adjoining uses</i>	Adjoining uses include B1/2/8 A4 C1 compatible with these and other employment creating uses.	3
<i>Site characteristics and development constraints</i>	Narrow sloping site running down to the canal. The shape of the site makes development relatively expensive. Part of the site falls within a Hazardous Installation - Consultation Zone and part also sits within Flood Risk Zone 2.	2
<i>Market Attractiveness</i>	Moderate	3
<i>Infrastructure</i>	Good well established to site but not on site.	2
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a Business Area, preferred use B1. Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area.</p> <p>Part of the site is designated for local conservation importance.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Single developer ownership responsive to demand, no known barriers to development subject to ground conditions including contamination.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**23**

EMPLOYMENT ALLOCATION:**Former Tinsley Marshalling Yards Europa Link****Reference****P00165****8.8 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	1km from the M1, A630 Sheffield Parkway	5
<i>Local Road Access</i>	Good access via Europa Link	5
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with very good access to labour and services.	5
<i>Compatibility of adjoining uses</i>	Given surrounding B1/2/8 uses, the site is wholly compatible.	5
<i>Site characteristics and development constraints</i>	Large level site supported by excellent established infrastructure. No known development constraints assuming that ground remediation was completed at the same time as the adjacent now developed SIRFT site. Part of the site is within a Hazardous Installation - Consultation Zone.	4
<i>Market Attractiveness</i>	Very Good	5
<i>Infrastructure</i>	Good, well established	5
<i>Planning / Sustainability Comments</i>	The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses. The Core Strategy allocates the site as a location for manufacturing, distribution, warehousing and other Non-office businesses. There are no other planning policy restrictions.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	An important site being one of few large level sites supported by good established road infrastructure. At the time of inspection it appeared that on-site infrastructure was under construction. Possibly affected by HS2 Rail line.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**34**

EMPLOYMENT ALLOCATION:**Huntsman's Gardens**

Reference

P00169**0.8 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	Access to the site is via the A631 from M1 J34	3
<i>Local Road Access</i>	A631 Shepcote Lane then Huntsman's Gardens which is a cul-de-sac	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Compatible with uses B1/2/8 and other sui generis industrial processes	3
<i>Site characteristics and development constraints</i>	Previously developed and substantially vacant broadly level site. Situated at the end of a cul-de-sac and subject to ground conditions suitable no known barriers to development. Part of the site is within a Hazardous Installation - Consultation Zone.	3
<i>Market Attractiveness</i>	Moderate	2
<i>Infrastructure</i>	Established infrastructure to site but would expect previous onsite services to have been removed.	3
<i>Planning / Sustainability Comments</i>	The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards. There are no landscape designations, or planning policy restrictions.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	In need of some demolition this site is mad less attractive by the poor condition of Huntman's Gardens and the feeling of dereliction. Otherwise a site suitable for a range of employment uses including B1/2/8 and other sui generis industrial processes.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**20**

EMPLOYMENT ALLOCATION:

Lumley Street

Reference

P00174

3.38



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant site including derelict buildings	
<i>Strategic Access</i>	Difficult access to Sheffield Parkway A57 Staniforth Road	3
<i>Local Road Access</i>	Woodbourne Road narrow road, Bernard Road low level bridge (4.7m) and Effingham Road.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	Very good for industrial redevelopment.	4
<i>Site characteristics and development constraints</i>	Linear elevated site previously developed with compromised existing access from 2 points along Lumley St.	4
<i>Market Attractiveness</i>	Reasonable subject to improvement of access and enhanced if in conjunction with adjacent site.	3
<i>Infrastructure</i>	Assume none to site, but sufficient in the road to accommodate most forms of development.	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>		

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 22

EMPLOYMENT ALLOCATION:**Next to Shepcote House Shepcote Lane
Sheffield****Reference****P00178****1.3 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	Just over 1km from M1 J34 South	4
<i>Local Road Access</i>	This site is accessed off the A631 Shepcote Lane which runs directly from J34S .	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	Very good, suitable for B1/2/8 commercial vehicle sales or similar.	4
<i>Site characteristics and development constraints</i>	Broadly level site cleared ready for development no known development constrains subject to ground conditions including contamination.	4
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established infrastructure adjacent to site not on site	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a Business Institution: Leisure Area, which excludes General Industry (B2), Warehousing and open storage (B8), Garage and transport depots and Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	A site suitable for a range of employment creating development purposes with good infrastructure and subject to points made above no known barrier to development	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**24**

EMPLOYMENT ALLOCATION:**Outokumpu Shepcote Lane**

Reference

P00182**19.92ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant site	
<i>Strategic Access</i>	Less than 1km from M1 J 34 South	5
<i>Local Road Access</i>	Direct access from site to A631 Shepcote Lane	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with excellent access to labour and services	5
<i>Compatibility of adjoining uses</i>	Widespread employment allocated area predominantly B1/2/8	4
<i>Site characteristics and development constraints</i>	Very large cleared level site. No apparent constraint on development, subject to ground conditions including contamination following the demolition of all above ground structures. The whole site is in a hazardous installation consultation zone.	4
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Well established road and services in the road and formerly onto site.	4
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other landscape designations or planning policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a site of strategic importance being one of few large level sites with excellent established infrastructure in the region. Suitable for a broad range and mix of employment creating uses	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**29**

EMPLOYMENT ALLOCATION:**Ripon Street / Woodbourne Hill**

Reference

P00187**0.7**

Criteria	Comment	Score (out of 5)
Current Use	Vacant land	
Strategic Access	Attercliffe Common A6178 to M1 and Staniforth Road B6200 to Sheffield Parkway	3
Local Road Access	Woodbourne Road and Woodbourne Hill. Roads servicing specific sites only.	3
Proximity to urban areas, and access to labour & services	Urban location with access to labour and services.	3
Compatibility of adjoining uses	Appropriate for broad range of industrial uses.	4
Site characteristics and development constraints	The site is in two parts, steeply sloping and on a number of levels. Remnants of previous development and contamination may have a bearing on future development. Part of the site is within a Hazardous Installation - Consultation Zone.	2
Market Attractiveness	Good for uses combatable with existing dominant land use.	3
Infrastructure	Established existing in the road, assume none to site.	2
Planning / Sustainability Comments	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other landscape designations, or planning policy restrictions.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>Given the division of the site and sloping nature it is suitable for small scale individual industrial buildings.</p> <p>Sheffield City Council owns a small section of this site.</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**20**

EMPLOYMENT ALLOCATION:

Sheffield Business Park Phase 2

Reference

P00191

**21.52
ha**



Criteria	Comment	Score (out of 5)
Current Use	Disused airport runway	
Strategic Access	Direct access to the A630 Sheffield Parkway.	5
Local Road Access	Europa Link provides excellent access.	5
Proximity to urban areas, and access to labour & services	Urban area with excellent access to labour and services.	5
Compatibility of adjoining uses	Excellent. Suitable in market terms for B1/2/8 A1/3/4 and leisure.	5
Site characteristics and development constraints	Very large level site. No know development constraints subject to ground suitability. This is made ground following open cast mining and back fill specification and high wall position may have bearing on positioning of built form.	4
Market Attractiveness	Excellent	5
Infrastructure	Well established adjacent to, but not on site.	4
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses including required uses: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area.</p> <p>There are no other planning policy restrictions or landscape designations.</p> <p>The site benefits from outline planning permission for a mixed use development, including offices (B1a), general industry and distribution uses. This is valid until 2015. The permission was secured under the Local Development Order for land uses that support the Sheffield City Region Enterprise Zone.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	This is an important strategic site being one of few available large level sites with excellent established road infrastructure. Subject to points raised above, no known barrier to development.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 33

EMPLOYMENT ALLOCATION:**Shepcote Road Europa Link****Reference****P00192****2 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	Just over 1km from M1 J34 South or J33	4
<i>Local Road Access</i>	Good access via Europa Link or A631 Shepcote Lane	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	4
<i>Compatibility of adjoining uses</i>	Very Good for B1/2 A4	4
<i>Site characteristics and development constraints</i>	Remediated level site ready for development being part of a larger site now substantially developed out. Part of the site falls within a hazardous installation consultation zone.	4
<i>Market Attractiveness</i>	Very Good	4
<i>Infrastructure</i>	Very good and well established	4
<i>Planning / Sustainability Comments</i>	The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards. There are no other planning policy restrictions.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	A well located site ready to be developed for a range of employment uses.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**28**

EXISTING EMPLOYMENT SITE

Vantage Riverside

Reference

P00200

Area (ha)

5.54 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Part developed part vacant land	
<i>Strategic Access</i>	Access straight onto the M1 J 34 South, less than 1km.	5
<i>Local Road Access</i>	Site fronts onto A6178 Sheffield Road.	4
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Compatible with the dominant adjoining use which is residential.	4
<i>Site characteristics and development constraints</i>	Large remediated level site possibly to be affected by the proposed Halfpenny Link Road. Sewage treatment plant.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Good established on site	4
<i>Planning / Sustainability Comments</i>	The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards. There are no other planning policy restrictions or landscape designations.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Proximity to the sewage treatment plant has been a factor in the relatively slow pace of letting the offices. Site is affected by the Tinsley Link but all necessary acquisitions are agreed, and should not affect the remainder from coming forward.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:	26
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EXISTING EMPLOYMENT SITE

Nunnery Sidings Dixon Site Phase 3

Reference

P00218

Area (ha)

1.83



Criteria	Comment	Score (out of 5)
Current Use	Park and Ride	
Strategic Access	A57 Sheffield Parkway	5
Local Road Access	Access 1km from the B6071 Bernard Road a reasonable quality road but with convoluted route to it from the Parkway	3
Proximity to urban areas, and access to labour & services	Urban Area with access to labour and services	3
Compatibility of adjoining uses	Good suitable for B1/2/8	3
Site characteristics and development constraints	Level hard surfaced site presently used for park and ride	3
Market Attractiveness	Good	3
Infrastructure	Well established	4
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards. The current park and ride use conflicts with the policy above.</p> <p>There are no other planning policy restrictions or landscape designations.</p> <p>The site has previously benefited from full planning permission for a 3/4 storey, 8,000 sq.m. B1 office development. (Ref: 07/01312/REM)</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	The present use is well established and appears at least superficially to be well used. No known barriers to development.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 24

EXISTING EMPLOYMENT SITE

Nunnery Sidings East

Reference

P00219

Area (ha)

1.38



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Offices and Manufacture and part vacant	
<i>Strategic Access</i>	Site backs onto Sheffield Parkway A57 and connects to Parkway Avenue.	4
<i>Local Road Access</i>	Access to the site is via Staniforth Road B6200 and then Woodbourne Road.	3
<i>Proximity to urban areas, and access to labour & services</i>	Within urban, predominantly industrial area.	3
<i>Compatibility of adjoining uses</i>	Adjacent land uses sharing the site, see above, and those in the wider area, Park and Ride and tram marshalling are appropriate for the further development of this site.	3
<i>Site characteristics and development constraints</i>	Linear site with narrow access point and road frontage. Back land accessible only from the road frontage.	2
<i>Market Attractiveness</i>	Reasonable for expansion of existing development.	2
<i>Infrastructure</i>	Fully serviced and established for existing use.	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates the site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area. There are no other planning policy restrictions.</p> <p>The undeveloped part of the site is Greenfield; however, there are no other landscape designations, or policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	The existing buildings were being improved at the time of writing. Multiple ownership	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 20

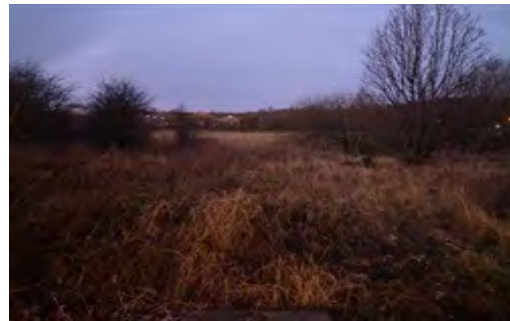
EMPLOYMENT ALLOCATION:

Airflow Site Clay Wheels Lane

Reference

P00233

2.55



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant Land	
<i>Strategic Access</i>	The A61 Penistone Road is a major trunk road that is periodically congested.	3
<i>Local Road Access</i>	This site is at the end of Claywheels Lane a long and effectively dead end road.	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with poor access to labour and services. Though this is an urban industrial area it forms part of a tongue of land with undeveloped land to the north and west.	2
<i>Compatibility of adjoining uses</i>	Good for uses B1/2/8 and other sui generis uses such as metals and waste recycling etc. However, residential is less than 200m from the site at Winn Gardens and there is a history of noise disturbance up the valley towards Northwood Drive.	2
<i>Site characteristics and development constraints</i>	Steeply sloping site the topography of which could inhibit development requiring a larger platform.	2
<i>Market Attractiveness</i>	Good for prescribed uses.	2
<i>Infrastructure</i>	Adequate for prescribed uses.	3
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses. The Sheffield Local Plan Proposals Map (pre-submission 2013) designates the site as part of the Business and Industrial Area in recognition of the need to expand the range of preferred uses as opposed to an Industrial Area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>Other than the topography of the site there are no apparent barriers to development.</p> <p>Ownership was identified as Airflow World Group Ltd (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 16

EMPLOYMENT ALLOCATION:**Former Clifton Steel Works Club Mill Road**

Reference

P00236**0.78**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Fully occupied and utilised waste transfer and recycling yard	
<i>Strategic Access</i>	Access to A61 Penistone Road from site.	4
<i>Local Road Access</i>	Neepsend Lane and Hillfoot Bridge narrow road which suffer due to congestion.	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	Suitable for present and related uses and B1/2/8 and other sui generis industrial processes.	4
<i>Site characteristics and development constraints</i>	Level hard surfaced yard with secure perimeter. The whole site is within a Hazardous Installations - Consultation Zone and also sits within Flood Risk Zone 2 and Flood Risk Zone 3a.	2
<i>Market Attractiveness</i>	Good for present use	3
<i>Infrastructure</i>	Established although local road access can be congested due to narrowness of roads.	3
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses without required uses. The preferred uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a Business and Industrial Area.</p> <p>The site is visible from Penistone Road which is listed as a key gateway route into the city by the Core Strategy. The Penistone Road Gateway Action Plan (2010) is a further material planning consideration.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Consent for the present use was granted some 2 years ago and is an appropriate use of this now fully utilised site. Ownership was S D Maher, P C Singleton, Rea Brothers Trustee Ltd (BILS,2006)	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**21**

EMPLOYMENT ALLOCATION:**Gas Holder Site Neepsend Lane Parkwood Road**

Reference

P00237**0.85**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Gas holder, gas plant and pipe work, part vacant	
<i>Strategic Access</i>	The A61 Penistone Road is a major trunk road that is periodically congested.	3
<i>Local Road Access</i>	Neepsend Lane and Parkwood Road narrow road which suffer from congestion.	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services	3
<i>Compatibility of adjoining uses</i>	Good for all employment uses except B1 offices.	3
<i>Site characteristics and development constraints</i>	Stepped site with only average road infrastructure. The whole site within a Hazardous Installations - Consultation Zone.	2
<i>Market Attractiveness</i>	Moderate	2
<i>Infrastructure</i>	Established services in the road. Only average road infrastructure compromised by access at Hillfoot and congestion at Rutland Road	2
<i>Planning / Sustainability Comments</i>	The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses. The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area.	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	The presence on site of existing gas plant and pipes allied to poor road access will limit the attractiveness of this site for development purposes. Owned by National Grid	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**17**

EMPLOYMENT ALLOCATION:**Herries Road Herries Rd South Penistone Road****Reference****P00239****2.25**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land seasonally a football pitch and a car park for car sales	
<i>Strategic Access</i>	The A61 Penistone Road provides reasonable access to the site but is remote from the motorway and congested at certain times of the day.	3
<i>Local Road Access</i>	The site fronts the A61 Penistone Road with Herries Road South to the rear which suffers from congestion at certain times of the day.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services.	4
<i>Compatibility of adjoining uses</i>	Compatible with mixed range of adjacent employment uses including B1/2 A1/4 car sales other leisure quasi retail and sui generis uses.	4
<i>Site characteristics and development constraints</i>	Level site with good access from 2 sides. Main water and gas infrastructure running through the site could impact adversely on some forms of development. The site is partially within Flood Risk Zone 3A and other parts are identified in Flood Zone 2.	3
<i>Market Attractiveness</i>	Very good	4
<i>Infrastructure</i>	Road infrastructure is moderate and there are no services to the site.	2
<i>Planning / Sustainability Comments</i>	<p>Core Strategy policy CS57 provides for remotely located long stay car parking in the Penistone Road Corridor. The site is allocated in the City Policies and Sites (2013) without required uses, listing research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses/ storage (B8).</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for a park and ride scheme within a Business and Industrial policy area.</p> <p>The site has been identified as suitable for park and ride but it is subject to funding which has not been forthcoming.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	Owned by Tesco	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**23**

EMPLOYMENT ALLOCATION:**Land at Clay Wheels Lane**

Reference

P00241**4.23**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Demolition waste recycling and associated offices	
<i>Strategic Access</i>		
<i>Local Road Access</i>		
<i>Proximity to urban areas, and access to labour & services</i>		
<i>Compatibility of adjoining uses</i>		
<i>Site characteristics and development constraints</i>		
<i>Market Attractiveness</i>		
<i>Planning / Sustainability Factors</i>		
<i>Infrastructure</i>		
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>		

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:

EMPLOYMENT ALLOCATION:

Land at Club Mill Road River Don A

Reference

P00242

0.63



Criteria	Comment	Score (out of 5)
Current Use	Open ad-hoc storage and parking.	
Strategic Access	Just under 1km from A61 Penistone Road both directions, however these are somewhat constrained.	3
Local Road Access	Hillfoot Bridge and Clubmill Road are narrow congested roads.	1
Proximity to urban areas, and access to labour & services	Urban area with access to labour. However the elongated nature of Club Mill Road makes some services harder to access.	3
Compatibility of adjoining uses	Good with B1/2/8 and other sui generis industrial processes.	4
Site characteristics and development constraints	Level site, however, site sits in a Flood Risk Zone 2.	3
Market Attractiveness	Moderate, though attractive to small sector of users particularly with noxious use.	2
Infrastructure	Established in Clubmill Road but assume none to site. Poor road infrastructure.	2
Planning / Sustainability Comments	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses includes: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area. There are no other planning policy restrictions.</p> <p>It is understood that the site has planning permission subject to conditions for industrial use.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>Notwithstanding the disadvantages of the accessibility of this site it will have an appeal to some users and is suitable for B1c (industrial), B2 and sui generis industrial processes.</p> <p>Ownership in 2006 was Lane Brothers Engineering Industries Ltd (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 18

EMPLOYMENT ALLOCATION:

Land at Wardsend Road

Reference

P00247

0.8



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	The A61 Penistone Road is a major trunk road that is periodically congested.	3
<i>Local Road Access</i>	Wardsend Road from the site onto A6102 Herries Road is a difficult junction.	1
<i>Proximity to urban areas, and access to labour & services</i>	The site is within a urban area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Appropriate uses B1/2/8. Surrounding uses include light manufacture, associated offices and steel stock holding? Resident property is above the subject site and separated from it by the railway.	3
<i>Site characteristics and development constraints</i>	Steeply sloping site running up to railway and over to the opposite side. On the opposite side there are houses.	2
<i>Market Attractiveness</i>	Limited	2
<i>Infrastructure</i>	Very limited infrastructure for comprehensive development.	1
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial area. Development will depend on how much other greenfield land has been developed in the previous five years in accordance with Core Strategy policy CS2.</p> <p>Predominantly greenfield, although there are no other restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	The topography and constrained steep access of this site will compromise development for employment creating uses.	

[Scoring: 5 = best, 1 = wors

TOTAL SCORE: 15

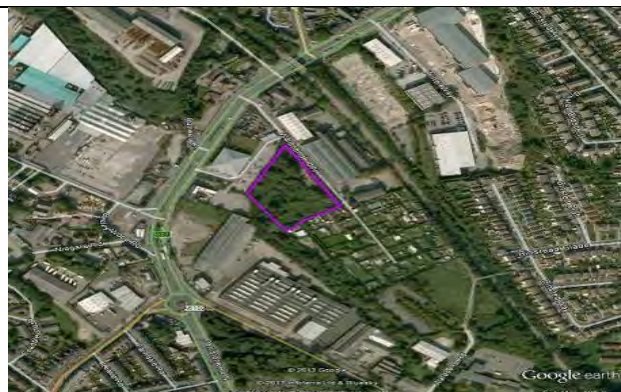
EMPLOYMENT ALLOCATION:

Wardsend Road North

Reference

P00248

0.77



Criteria	Comment	Score (out of 5)
Current Use	Car parking and open storage	
Strategic Access	The A61 Penistone Road is a major trunk road that is periodically congested.	3
Local Road Access	Wardsend Road North is a narrow road with a difficult junction onto the A61.	1
Proximity to urban areas, and access to labour & services	Within an urban area with poor access to labour and services.	2
Compatibility of adjoining uses	Appropriate for uses B1/2/8. Surrounding uses include low quality manufacturing space with offices.	3
Site characteristics and development constraints	Small area to side of road forms a level useable platform, otherwise the site slopes steeply and could be costly to develop.	1
Market Attractiveness	Limited	1
Infrastructure	Adequate for existing use but limited for further development.	2
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and scrapyards are not acceptable development under this policy.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area. Development will depend on how much other greenfield land has been developed in the previous five years in accordance with Core Strategy policy CS2. There are no other planning policy restrictions.</p> <p>The City Sites and Policies DPD identifies the site as underused greenfield.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>The topography of this site could compromise its development for any employment creating uses.</p> <p>Ownership in 2006 Receivers of Richard W Carr & Co Ltd. (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 13

EMPLOYMENT ALLOCATION:**Livesey St Doncaster Lane****Reference****P00251****1.21**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Manufacture and storage	
<i>Strategic Access</i>	The A61 Penistone Road is a major trunk road that is periodically congested.	3
<i>Local Road Access</i>	Livesey St runs directly off the A61 at the complex light controlled junction with Owlerton Green and Bradfield Road	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Whilst the use to the south is industrial the uses, all other sides are not. Other uses include education, leisure and car sales.	3
<i>Site characteristics and development constraints</i>	Level site which sits within Flood Risk Zone 2, however no other known development constraints.	3
<i>Market Attractiveness</i>	Good potential for a broad range of employment uses.	3
<i>Infrastructure</i>	The area including Livesey St is served by good established services.	4
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates for the site is for flexible uses within policy area for general employment.</p> <p>There are no other planning policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	A site which might be suitable for a range of employment uses, although possible compromised by its location. Uses that require prominence may be concerned.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**22**

EMPLOYMENT ALLOCATION:**Neepsend Gas Works Tip**

Reference

P00252**5.5**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant Site	
<i>Strategic Access</i>	From the A61 Penistone Road North which is a trunk road that is periodically congested.	3
<i>Local Road Access</i>	Neepsend Lane and Parkwood Road both narrow roads access to both of which are constrained by the tight junction at Hillfoot Bridge.	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Compatible with B1 (non-office) B2/8 and other sui generis industrial processes.	3
<i>Site characteristics and development constraints</i>	Large site which is on two levels and has been extensively remediated but contains a large gas pipe. In April 2012 National Grid confirmed to the Council that they have remediated the site ready for open storage and commercial/industrial use. The whole site is within a Hazardous Installations - Consultation Zone and part of the site is within Flood Risk Zone 2.	3
<i>Market Attractiveness</i>	Moderate	2
<i>Infrastructure</i>	Established services in adjacent roads but assume no onsite services. Compromised local roads.	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a large site that depending on remediation standards should be suitable for a broad range and scale of industrial development and employment creating uses. Existing major pipe work and gas plant will inhibit development interest, Owned by National Grid	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**18**

EMPLOYMENT ALLOCATION:

Site of Doncaster between Rivers Loxley and Don

Reference

P00256

1.6



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Parking and open storage	
<i>Strategic Access</i>	A61 Penistone Road	3
<i>Local Road Access</i>	Site access from A61 is via a very tight private road running between car dealerships and over a narrow bridge.	1
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services. Bus stop on A61 north west and south bound.	3
<i>Compatibility of adjoining uses</i>	Adjoining uses are car sales and manufacture possible broad range of employment uses compatible	3
<i>Site characteristics and development constraints</i>	Level site with narrow private road and bridge over the river may compromise some forms of development. Much of the site is identified as Flood Risk Zone 2 with a further part of the site identified as Flood Risk Zone 3A.	2
<i>Market Attractiveness</i>	Moderate	2
<i>Infrastructure</i>	Road infrastructure is poor. Assume that given heavy manufacturing to adjacent site adequate services are to site for most forms of development	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site with the following required uses: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses/ storage (B8).</p> <p>There are no other planning policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This site is heavily compromised by its back land characteristics and compromised infrastructure.</p> <p>Ownership in 2006 Doncaster PLC (2006)</p>	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 16

EMPLOYMENT ALLOCATION:**Hillfoot Steels Penistone Road North**

Reference

P00257**0.58**

Criteria	Comment	Score (out of 5)
Current Use	Steel stock yard	
Strategic Access	Site borders the A61 Penistone Road North a good road that is periodically prone to congestion.	3
Local Road Access	Same as Strategic	3
Proximity to urban areas, and access to labour & services	Urban area with access to labour and services. Very good access to a number of bus services to the South, and North of the site.	3
Compatibility of adjoining uses	Appropriate for B1/2/8 and other employment uses including A1/3/4 C1 and other leisure.	3
Site characteristics and development constraints	Level triangular site adjacent to steel stock holder with high prominence to A61.	3
Market Attractiveness	Good	3
Infrastructure	Good road access and established services.	3
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and scrapyards are not acceptable development under this policy.</p> <p>The Core Strategy lists this location as suitable for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site without required uses and lists the following uses as preferred: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a Business and Industrial Policy Area. Penistone Road is listed as a gateway route into the city by the Core Strategy and the Penistone Road Gateway Action Plan (2010) which is a material planning consideration.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>A prominent site suitable for a broad range of employment creating uses.</p> <p>Ownership in 2006 in Hillfoot Steel (Forgers) Ltd/Some Council ownership (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**21**

EXISTING EMPLOYMENT SITE

Beeley Wood Clay Wheels Lane

Reference

P00258

Area (ha)

13.34



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	B2/8 and recycling	
<i>Strategic Access</i>	Just over 1.5km to A61 Penistone Road	3
<i>Local Road Access</i>	Claywheels Lane from the site joins the A61, however is compromised by narrow road access. Some residential houses.	3
<i>Proximity to urban areas, and access to labour & services</i>	At the edge of an industrialised area with green space to all sides but the south east with good access to labour and services. Supertram stop across the river with no direct access from site, and bus stop to the south east located on A61 end of Claywheels Lane.	3
<i>Compatibility of adjoining uses</i>	The only directly adjoining use is woodland and farm land other than to the south east. Never the less the site is suitable for B1 (industrial) B2/8 and other sui generis industrial operations and processes. The site is within 200m of housing on Middlewood Road and there is a history of noise disturbance up the valley towards Northwood Drive.	3
<i>Site characteristics and development constraints</i>	A large site on a number of levels. Has been occupied by a single user for many years. Much of the built space has been demolished, although the site probably remains heavily contaminated.	3
<i>Market Attractiveness</i>	Reasonable for certain noxious uses.	2
<i>Infrastructure</i>	Given the previous use of the site there could be good provision of services to site. Road infrastructure is slightly compromised but still adequate for many users	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) designates the site as part of the Business and Industrial Area in recognition of the need to expand the range of preferred uses as opposed to an Industrial Area. It also allocates the site for business and industry uses including research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses/ storage (B8).</p> <p>The site is adjacent to the Green Belt and proposals for development should minimise the impact on the visual amenity of the Green Belt.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a very large site the development of which in the past has been compromised by the conflict between the development aspirations of the owners and the Planning Authority.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:	19
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EXISTING EMPLOYMENT SITE

United Cranes Site Claywheels Lane

Reference

P00259

Area (ha)

1.5 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Crane yard and repair	
<i>Strategic Access</i>	Less than 1km from A61 Penistone Road and as such strategic access is reasonable.	3
<i>Local Road Access</i>	Claywheels Lane from the site joins the A61, however is compromised by narrow road access. Some residential houses.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with good access to labour and services. Number of bus stops on A61 both north and south bound.	3
<i>Compatibility of adjoining uses</i>	Appropriate for B1/2/8 uses which comprise offices, manufacture, waste reclamation, bakery and Supermarket. Some houses as noted above. The site is within 100m of housing Winn Gardens and there is a history of noise disturbance in the area.	3
<i>Site characteristics and development constraints</i>	Level site possibly underutilised by existing occupier and immediately adjacent to river. The whole site is located in Flood Risk Zone 2.	2
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established and adequate for anticipated uses.	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business and industry uses including research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses/ storage (B8) within a Business and Industrial Policy Area.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a developed site in beneficial use, albeit possibly underutilised.	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 20

EMPLOYMENT ALLOCATION:**Adjacent Former Hydra Tools Nether Lane
Ecclesfield**

Reference

P00261**1.18 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	1km from the M1 J35	4
<i>Local Road Access</i>	Good local access on A629 and B6087. Poor visibility issues from site on to B6087.	4
<i>Proximity to urban areas, and access to labour & services</i>	On the fringe of the urban area, part of industrialised area with reasonable good access to labour and services. North bound buses on the B6087.	4
<i>Compatibility of adjoining uses</i>	Adjacent uses comprise manufacturing with offices and as such are compatible with further B1/2/8 users.	4
<i>Site characteristics and development constraints</i>	Broadly level infill site. Access is off an inside curve in the road.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Good established roads and services to site but not on site.	3
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is a straight forward infill plot that subject to resolution of visibility issue for access is suitable for B1/2/8 uses.</p> <p>Ownership RW Simpson</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**25**

EMPLOYMENT ALLOCATION:**Adjacent to disused railway Butterthwaite Lane****Reference****P00262****1.48 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Grazing	
<i>Strategic Access</i>	2km to M1 with no direct access.	2
<i>Local Road Access</i>	Lochier Lane and field access very constrained narrow difficult roads.	1
<i>Proximity to urban areas, and access to labour & services</i>	Site at the fringe of the industrial area with reasonable access to labour an access to services limited.	2
<i>Compatibility of adjoining uses</i>	Limited. This is a Greenfield; semi isolated other than via adjacent site.	1
<i>Site characteristics and development constraints</i>	Gently sloping site with particularly limited access and part of it sits within Flood risk Zone 2.	1
<i>Market Attractiveness</i>	Poor	1
<i>Infrastructure</i>	None	1
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industry uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>The site is, however, greenfield land. Although, there are no other landscape designations, or planning policy restrictions.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>		

[Scoring: 5 = best, 1 = worst**TOTAL SCORE:****9**

EMPLOYMENT ALLOCATION:

Ernest Thorpe Lorry Park Station Road Deepcar

Reference

P00266

0.95 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Lorry Park	
<i>Strategic Access</i>	Though less than 1km from A616 the local road access compromises access	2
<i>Local Road Access</i>	A6102 Manchester Road. This is a busy road but the final approach to the Site via Wortley Road and Station Road is poor and constricted.	2
<i>Proximity to urban areas, and access to labour & services</i>	Site is on the fringe of the nearby residential area, adjacent to small industrial estate with access to labour and services. There are a number of bus stops on the A6102 and within the residential area.	3
<i>Compatibility of adjoining uses</i>	Acceptable for B1 (non-office), B2/8 and other sui generis industrial processes.	3
<i>Site characteristics and development constraints</i>	Level and triangular site. Poor road infrastructure and possible ground conditions including contamination.	2
<i>Market Attractiveness</i>	Limited	2
<i>Infrastructure</i>	Poor limited established services which are adequate for the present use which is low value with limited low density development	2
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site with a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A I) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p> <p>The City Policies and Sites document 2013 outlines that development is currently being promoted through pre-application discussions with potential developers.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This site has an attraction only to a local market and as such is suited to its present or similar uses.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 16

EMPLOYMENT ALLOCATION:**Former Petrol Depot Johnson Lane / Station Road Ecclesfield****Reference****P00270****1.63 ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	1.5km to M1 J35	4
<i>Local Road Access</i>	Access is from the A6135 'The Common' which leads to Station Road; alternatively via Johnson Lane. Access onto site from the former is very narrow, the site at that point narrows still further and is immediately adjacent to the railway bridge the narrowness of which constricts the road width, effectively one way traffic only. The latter is partly unmade very narrow, passes very close to private dwellings and would be unsuitable for more intensive use.	1
<i>Proximity to urban areas, and access to labour & services</i>	Edge of industrialised area with reasonable access to labour and limited services.	2
<i>Compatibility of adjoining uses</i>	Some sensitivity to housing on Johnson Lane.	2
<i>Site characteristics and development constraints</i>	Previously developed now vacant site. Access from Johnson lane is too narrow and passes houses and is inappropriate to use. Access from Station road is very narrow and immediately adjacent to narrow bridge.	1
<i>Market Attractiveness</i>	Poor	1
<i>Infrastructure</i>	Overall limited.	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This site is heavily constrained by limited and poor access.</p> <p>Ownership in 2006 Firth Rixon Special Steels Ltd (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**13**

EMPLOYMENT ALLOCATION:**Station Road Manchester Road Deepcar****Reference****P00271****24.65
ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Derelict land and rough grazing	
<i>Strategic Access</i>	Less than 1km to M1 J36	5
<i>Local Road Access</i>	A616 then the A6102 Manchester Road, is a very narrow road with residential area to the west past site.	2
<i>Proximity to urban areas, and access to labour & services</i>	Large site with long but essentially un-bridged frontage along Manchester road.	3
<i>Compatibility of adjoining uses</i>	Adjoining transport yard and small scale industrial estate to the north	2
<i>Site characteristics and development constraints</i>	This site comprises a huge former quarry and tip and incorporating sewage treatment plant. Parts of the site that fall within Flood Risk Zone 2, 3A and 3B.	2
<i>Market Attractiveness</i>	Poor	1
<i>Infrastructure</i>	None	1
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site within a Fringe Industry and Business Area, preferred uses B1, B2, B8 (excluding open storage). Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; Open storage (B8); Lorry parks; Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for housing within a housing and open space policy area.</p> <p>Part of the site is a designated Site for Special Scientific Interest as well as local conservation importance. Part of the site designated for open space.</p> <p>The site has detailed planning permission for 405 dwellings including access road and bridge.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>The abnormal development costs allied to present economic condition associated with the development of this site must render it undevelopable for the foreseeable future, perhaps other than in smaller parcels to the lower parts of the site accessed from Station Road. Areas of the site possibly better suited to residential development</p> <p>Ownership Bloor Homes</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**16**

EMPLOYMENT ALLOCATION:

Former Tilcon Depot Station Road Ecclesfield

Reference

P00272

0.8 ha

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Veolia Waste recycling site	
<i>Strategic Access</i>		
<i>Local Road Access</i>		
<i>Proximity to urban areas, and access to labour & services</i>		
<i>Compatibility of adjoining uses</i>		
<i>Site characteristics and development constraints</i>		
<i>Market Attractiveness</i>		
<i>Planning / Sustainability Factors</i>		
<i>Infrastructure</i>		
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>		

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:	
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EXISTING EMPLOYMENT SITE

**G Fisher Business Park and Transport Yard
Green Lane Ecclesfield**

Reference

P00273

Area (ha)

0.81 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Transport, haulage, vehicle repairs and small scale manufacture	
<i>Strategic Access</i>	The site is 2km from the J35 M1 via the A6135 the principle road through Ecclesfield off which access is gained to individual dwellings shops, Morrison's Supermarket, the District Police Station and new housing developments.	3
<i>Local Road Access</i>	The site is on the A6087 Green Lane which runs from the site.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Housing, B1/2/8.	3
<i>Site characteristics and development constraints</i>	Level, substantially developed site partially with Flood Risk Zone 3A, and no other known development constraints.	2
<i>Market Attractiveness</i>	Moderate	1
<i>Infrastructure</i>	Established road and services on site. Local road infrastructure to site is congested.	3
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for flexible uses within a general employment policy area.</p> <p>The site is within a developed Flood Plain Zone 3A(i) not just Flood Zone 3a. Policy CS67(f) does not allow an increase in the collective existing 540 sq. m. footprint of built development on the site. This is an added constraint to zone 3A and reflects the site's Marketability score.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is a substantially developed site, suitable of enhancement rather than being an opportunity for wholesale redevelopment.</p> <p>Ownership in 2006 was George Fisher Transport (BILS, 2006)</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE: 18

EMPLOYMENT ALLOCATION:

**Next to Arthur Lee Works Lochier Lane
Ecclesfield**

Reference

P00279

0.91 ha



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land adjacent to batching plant	
<i>Strategic Access</i>	2km to M1 J35	3
<i>Local Road Access</i>	Access is via A6135 Ecclesfield Common the Station Road and Lochier Lane which are constrained by a narrow bridge and the badly made estate road.	2
<i>Proximity to urban areas, and access to labour & services</i>	Urban industrial area with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Good, predominantly B1/2/8 and other sui generis industrial processes.	3
<i>Site characteristics and development constraints</i>	Back land accessed from private estate road. Appears to be made ground and so ground conditions may be a development constraint. Site access falls within Flood Risk Zone 2.	2
<i>Market Attractiveness</i>	Poor, limited to low value and low impact dirty uses.	2
<i>Infrastructure</i>	Poor	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>Although this site is in low flood risk zone 1, the only access into the site is completely within Zone 2 medium flood risk therefore some mitigation would be required subject to an assessment.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	The wider estate that this site forms a part of is generally underutilised but suitable for low value uses and waste recycling etc.	

[Scoring: 5 = best, 1 = worst

TOTAL SCORE: 17

EMPLOYMENT ALLOCATION:**Smithywood Cowley Hill Chapeltown**

Reference

P00287**32.42ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	Less than 1km to M1 J35	5
<i>Local Road Access</i>	Good access to A629 onto M1 J35.	5
<i>Proximity to urban areas, and access to labour & services</i>	Site is on the fringe of the urban area and is a prominent motorway location. There is a bus stop located at the north of the site.	4
<i>Compatibility of adjoining uses</i>	Fully compatible with B1/2/8	5
<i>Site characteristics and development constraints</i>	Large prepared serviced site ready for development, however, part of the site falls within Flood Risk Zone 2	4
<i>Market Attractiveness</i>	Excellent	5
<i>Infrastructure</i>	Established road and services on site.	5
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and Scrapyards are not acceptable development under this policy and is a proposed business and industrial site.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>Planning permission for 56,750 sq.m. of Non-office B1, B2 and B8 use.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is strong motorway located development site with no obvious barriers to development.</p> <p>Ownership in 2006 Duke of Norfolk Estates / Yorkshire Forward (BILS,2006)</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**33**

EMPLOYMENT ALLOCATION:**New Street Long Acre Way****Reference****P00370****1.4**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant site, ponies grazing	
<i>Strategic Access</i>	The B6053 Eckington Way is a dual carriageway running through this part of the city.	3
<i>Local Road Access</i>	Owlthorpe Greenway is mainly residential on the one side and industrial on the other and must be accessed by Longacre Way which is narrow and suffers from parked cars either side.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area, industrial estate and part of township with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Good and suitable for B1/2/8 uses	3
<i>Site characteristics and development constraints</i>	Gently sloping site possibly therefore better suited to smaller industrial or office units. No constraints.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established provision of required services	4
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses and is also a proposed business and industrial site.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>This site is greenfield land; however there are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>Regular well proportioned plot suitable for all forms of industrial and office employment uses. No known barrier to development.</p> <p>Ownership: K & M wholesale suppliers</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**22**

EMPLOYMENT ALLOCATION:**Meadowbrook Park**

Reference

P00373**0.6**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant land	
<i>Strategic Access</i>	The B6053 Eckington Way is a dual carriageway running through this part of the city.	3
<i>Local Road Access</i>	B6058 Station Road runs through residential area.	3
<i>Proximity to urban areas, and access to labour & services</i>	Site is within an urban area being part of an established industrial estate with access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Good and suitable for B1/2/8 uses.	5
<i>Site characteristics and development constraints</i>	Level site with very good access and no known barriers to development.	5
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established services to adjacent roads and good road infrastructure, however, there is no establish infrastructure on site.	3
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in the Unitary Development Plan within a General Industry Area, with no restrictions on employment uses and is a proposed business and industrial site.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>A regular shaped, level site that should be attractive to all forms of office and industrial employment uses. No known barriers to development.</p> <p>Ownership Jackson Building Centre – Pension Trust Limited.</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**25**

EMPLOYMENT ALLOCATION:**Mosborough Wood Business Park**

Reference

P00376**4.16ha**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant development site	
<i>Strategic Access</i>	Site is directly next to B6053 Eckington Way	4
<i>Local Road Access</i>	Holbrook Ave, parked cars directly opposite site access and have to cross tramlines onto Eckington Way.	3
<i>Proximity to urban areas, and access to labour & services</i>	Urban area with access to labour and services	3
<i>Compatibility of adjoining uses</i>	Good and suitable for a broad range of employment uses including B1/2/8 A1 and other leisure uses. Unsuitable for residential use. Guy?	4
<i>Site characteristics and development constraints</i>	A large site with a central level development platform, suitable for small and large scale development. Guy?	4
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	The road infrastructure to site is partly complete, including the bridge access which has now been built. Established services adjacent to site, however, to our knowledge not onsite.	3
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses and is a proposed business and industrial site. The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for industrial uses including general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8) within an industrial policy area.</p> <p>This site is a greenfield site; however, there are no other planning policy restrictions or landscape designations.</p> <p>Outline planning permission was granted in September 2009 for mixed use development incorporating B1, B2 and B8 uses. A bridge to provide access to the site has been completed, improving access to the site.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	<p>This is an attractive site the development of which has been compromised by market conditions. No known barriers to development though the ground conditions are unknown and there may have been a contaminating former use.</p> <p>Ownership William Cook Estates Limited</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**24**

EMPLOYMENT ALLOCATION:**Rotherham Road Beighton**

Reference

P00386**1.06**

Criteria	Comment	Score (out of 5)
Current Use	Rough grazing	
Strategic Access	Less than 1km from A57	5
Local Road Access	Rotherham Road is a two lane road essentially serving the community of Beighton and the industry adjacent to this site only.	3
Proximity to urban areas, and access to labour & services	This site is on the fringe of a satellite settlement and is adjacent to stand alone industrial estate.	3
Compatibility of adjoining uses	Suitable as infill development for B1 non-office B2/8 and some other sui generis industrial processes.	3
Site characteristics and development constraints	Level, triangular field lying between the settlement, Beighton and an industrial estate and parts are located in Flood Risk Zone 2 and 3A.	3
Market Attractiveness	Good	3
Infrastructure	No onsite infrastructure, but established in adjacent road which are good	2
Planning / Sustainability Comments	<p>The Unitary Development Plan allocates this site with a Business Area, preferred use B1. Unacceptable uses include: Other shops (A 1) unless at the edge of the Central Shopping Area or a District or Local Shopping Centre; General industry (B2); Open storage (B8) and, in Manor Opportunity Area; warehouses (B8); Residential institutions (C2); Housing (C3) outside the City Centre; Lorry parks and Scrapyards.</p> <p>The emerging Local Plan, City Policies and Sites DPD (2013) allocates the site for business or industrial uses. These required uses include: research and development (B1b) or light industry (B1c) or general industry (B2 or other, unclassified industrial/ processing uses) or warehouses and open storage (B8), as appropriate within a business and industrial policy area.</p> <p>Greenfield land.</p>	
Other Comments (i.e. ownership factors, barriers to development where available)	<p>A small infill piece of land between the settlement, railway line and an industrial estate.</p> <p>Ownership: Aston Scaffolding, Leigh Interests PLC, Phil Sheppard</p>	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**22**

EXISTING EMPLOYMENT SITE

Footprint Tools and Sytners

Reference

P00426

Area (ha)

1.3



Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Car sales and storage	
<i>Strategic Access</i>	The site is less than 1km from the A61 Inner Ring Road and as such is a moderately well served by the strategic road network though compromised by volume of traffic at various points in the working day.	3
<i>Local Road Access</i>	Brook Hill and Broad Lane are compromised by traffic volume at certain times of the day.	3
<i>Proximity to urban areas, and access to labour & services</i>	Within the urban City Centre with very good access to labour and services.	4
<i>Compatibility of adjoining uses</i>	Appropriate for present use and future B1, C3 D1/2 and other leisure.	3
<i>Site characteristics and development constraints</i>	Large, centrally located and sloping site. Topography will be a determining factor in the nature and type of future development.	3
<i>Market Attractiveness</i>	Reasonable	2
<i>Infrastructure</i>	Established for present and last use but likely to require enhancement for significant redevelopment.	2
<i>Planning / Sustainability Comments</i>	<p>The site is allocated in Unitary Development Plan within a General Industry Area, with no restrictions on employment uses and a proposed industrial and business site.</p> <p>The Core Strategy allocates this site within a transition area where manufacturing in City Centre should not expand if it would detract from the regeneration of the centre.</p> <p>There are no other planning policy restrictions or landscape designations.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	The manufacturing element of the site was speculatively bought for residential development. This is not an attractive location for car sales in market terms and so the site represents a good opportunity for future redevelopment and regeneration.	

FOR EXISTING SITES ONLY

<i>Type of Existing Use (B1/B2/B8 other)</i>	B8 Sui generis (car sales)
<i>Existing Vacancy Levels</i>	Nil but under utilised
<i>Age of existing Premises (pre war; 1945-1970; 1970-90; 1990-00; post 2000)</i>	1945 - 1970
<i>Condition of Existing Premises</i>	Adequate for existing purposes
<i>Amount of Development Land Available</i>	Nil
<i>Potential for Alternative Employment Use</i>	Good
<i>Existing Occupiers</i>	Sytner BMW and others

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:	20
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EMPLOYMENT ALLOCATION:**Rawson Spring Road**

Reference

P00430**0.63**

Criteria	Comment	Score (out of 5)
<i>Current Use</i>	Vacant site ad-hoc open storage	
<i>Strategic Access</i>	A61 Penistone Road provides reasonable access to the site but is remote from the motorway and congested at certain times of the day.	3
<i>Local Road Access</i>	Herries Road South congested at certain times of the day.	3
<i>Proximity to urban areas, and access to labour & services</i>	An urban area with good access to labour and services.	3
<i>Compatibility of adjoining uses</i>	Appropriate for B1/2/8 and quasi retail in the form of bulky goods or trade counter.	4
<i>Site characteristics and development constraints</i>	Level, secure and cleared site. Much of the site in Flood Risk Zone 2 with part located in 3A.	3
<i>Market Attractiveness</i>	Good	3
<i>Infrastructure</i>	Established to the area, not on site	3
<i>Planning / Sustainability Comments</i>	<p>The Unitary Development Plan allocates this site for General Industry without special industries, which outlines that Open storage (B8) and scrapyards are not acceptable development under this policy and is a proposed business and industrial site.</p> <p>The Core Strategy allocates the site as a location for manufacturing distribution, warehousing and other non-office businesses.</p> <p>The site has received planning permission for 11 business units.</p>	
<i>Other Comments (i.e. ownership factors, barriers to development where available)</i>	This is a level site in an area where land take up for employment use development has progressed steadily. No known barriers to development	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**22**

EMPLOYMENT ALLOCATION:**Harmer Lane / Sheaf Street**

Reference

P00470**0.15**

Criteria	Comment	Score (out of 5)
Current Use	Landscaped open space	
Strategic Access	The east boundary of the site is on Sheaf Street	4
Local Road Access	The northern boundary is on Harmer Lane which joins directly onto Sheaf Street.	4
Proximity to urban areas, and access to labour & services	The site is within the main urban City Centre with good access to labour and services.	4
Compatibility of adjoining uses	Appropriate for broad range of employment creating uses.	4
Site characteristics and development constraints	Small, irregular shaped site within a prominent position. Parts of the site are in Flood Risk Zone 2 and 3A.	2
Market Attractiveness	Limited, this is a small, uneven, irregular shapes site.	2
Infrastructure	Established infrastructure adjacent to the site.	3
Planning / Sustainability Comments	The Unitary Development Plan allocates the site for open space. The emerging Local Plan, City Policies and Sites DPD (2013) allocate the site for office uses and within an office policy area.	
Other Comments (i.e. ownership factors, barriers to development where available)	This small site enhances the public realm in this area and might best be allocated to its existing use. Ownership: Homes and Communities Agency	

[Scoring: 5 = best, 1 = worst]

TOTAL SCORE:**23**

Appendix 4 Site Summary Matrix

Ref	Site name	Regeneration Area	Site Area (gross)	Site Area (net)	Access to Strategic Road Network	Local road access including congestion and quality of roads	Proximity to urban areas and ease of access to labour & services	Compatibility of adjoining uses	Site characteristics and development constraints (including topography, size, profile, development constraints etc)	Market Attractiveness (rated by both settlement and specific location)	Infrastructure	Total Ranking
P00001	Upwell Street/Colliery Road	Lower Don Valley	6.26	5.634	4	4	4	4	4	5	5	30
P00005	Former ROM site, Meadowhall Road	Lower Don Valley	4.4	0.44	5	4	4	4	2	3	4	26
P00008	Cannon Brewery Rutland Road	Upper Don Valley	0.8	0.72	3	2	3	4	3	3	2	20
P00015	Oakham Drive/ Rutland Road	Upper Don Valley	1.07	0.91	3	2	3	4	3	3	3	21

P00016	Parkwood Springs Business Park	Upper Don Valley	3.38	2.54	3	1	3	3	1	1	1	13
P00022	Spital Hill employment zone (Cherry Tree and informal space)	Lower Don Valley	1.2	0.6	4	2	3	2	1	1	2	15
P00026	Stanley Tools, Rutland Road	Upper Don Valley	1.1	0.88	3	2	3	3	1	1	2	15
P00045	Castlegate (Exchange Place)	City Centre	0.24	0.24	4	3	5	4	3	4	4	27
P00045	Castlegate (Commercial St/Broad St)	City Centre	0.2	0.18	4	4	5	4	3	3	4	27

P00065	Furnival Square / Matilda Way	City Centre	0.96	0	4	4	5	4	3	2	4	26
P00068	Hallam Lane	City Centre	0.616	0	4	2	4	4	2	2	3	21
P00070	In front of Midland Station	City Centre	0.6	0.54	4	2	5	4	3	3	3	24
P00073	Land and Buildings, Hanover Way (Milton Street)	City Centre	0.51	0.459	5	3	5	3	3	3	3	25
P00089	Pitsmoor Road/Chatham Street/Swinton Street	City Centre	2.582	1.8	3	2	5	2	1	1	2	16
P00100	Sheaf Valley Digital Campus Site Phase 2, Pond Street	City Centre	0.39	0.35	4	3	5	4	3	4	4	27

P00110	Spitalfields/ Brunswick Road	City Centre	0.77	0.693	4	4	5	4	3	4	4	28
P00127	Weedon St / Meadowhall Way ('River Don District')	Lower Don Valley	25	22.5	5	5	5	5	4	3	4	31
P00136	Rear of Davy McKee, Prince of Wales Road	Lower Don Valley	2.1	1.4	3	3	3	3	2	1	1	16
P00137	Barleywood Road	Lower Don Valley	0.9	0.6	3	3	3	3	2	1	2	17
P00138	Betafence, Sheffield Road	Lower Don Valley	5.15	4.12	5	5	5	4	3	3	3	28

P00140	Broadoaks	Lower Don Valley	0.6	0.36	3	2	3	3	2	2	3	18
P00141	Broadlands, Lumley St	Lower Don Valley	2.5	0.75	3	3	3	4	3	3	4	23
P00143	Calor site, Shepcote Lane	Lower Don Valley	1.5	1.2	5	3	3	4	3	3	3	24
P00145	Catley Road	Lower Don Valley	0.6	0.48	3	3	3	3	2	2	2	18
P00153	Faraday Rd /Trent Street	Lower Don Valley	0.78	0.7	3	2	3	4	3	2	2	19

P00155	Former Asda site Orgreave Place 1	Mosborough/ Woodhouse	1.16	1.04	4	4	3	3	4	3	3	24
P00156	Scaffold Yard, Orgreave Place	Mosborough/ Woodhouse	0.5	0.475	4	4	3	3	3	3	3	23
P00160	Former Dr John Worrall School, Attercliffe	Lower Don Valley	0.7	0.59	3	4	3	3	3	3	2	21
P00164	Former Sheffield Tipper's site, Sheffield Road	Lower Don Valley	0.93	0.465	5	4	4	3	2	3	2	23
P00165	Former Tinsley Marshalling Yards, Europa Link	Lower Don Valley	8.8	7.92	5	5	5	5	4	5	5	34

P00169	Huntsman's Gardens	Lower Don Valley	0.8	0.64	3	3	3	3	3	2	3	20
P00174	Lumley Street	Lower Don Valley	3.38	2.7	3	3	3	4	4	3	2	22
P00178	Next to Shepcote House, Shepcote Lane	Lower Don Valley	1.3	1.1	4	3	3	4	4	3	3	24
P00182	Outokumpu, Shepcote Lane	Lower Don Valley	19.92	17.928	5	4	5	4	4	3	4	29
P00187	Ripon Street/Woodbourn Hill	Lower Don Valley	0.7	0.525	3	3	3	4	2	3	2	20

P00191	Sheffield Business Park Phase 2	Lower Don Valley	21.52	21.52	5	5	5	5	4	5	4	33
P00192	Shepcote Lane/Europa Link	Lower Don Valley	2	1.8	4	4	4	4	4	4	4	28
P00200	Vantage Riverside	Lower Don Valley	5.54	4	5	4	3	4	3	3	4	26
P00218	Nunnery Sidings - Dixons Site Phase 3 (Park and ride)	Lower Don Valley	1.83	1.83	5	3	3	3	3	3	4	24
P00219	Nunnery Sidings (East)	Lower Don Valley	1.38	0.75	4	3	3	3	2	2	3	20

P00233	Airflow Site, Claywheels Lane	Upper Don Valley	2.55	2	3	2	2	2	2	2	3	16
P00236	Former Clifton Steelworks, Club Mill Road / Hoyland Road	Upper Don Valley	0.78	0.702	4	2	3	4	2	3	3	21
P00237	Gas Holder Site, Neepsend Lane / Parkwood Road	Upper Don Valley	0.85	0.723	3	2	3	3	2	2	2	17
P00239	Herries Road, Herries Road South / Penistone Road North	Upper Don Valley	2.25	2.025	3	3	4	4	3	4	2	23
P00242	Land at Club Mill Road / River Don A	Upper Don Valley	0.63	0.535	3	1	3	4	3	2	2	18

P00258	Beeleywood, Claywheels Lane	Upper Don Valley	13.34	8	3	3	3	3	3	2	2	19
P00259	United Cranes Site, Claywheels Lane	Upper Don Valley	1.5	0	3	3	3	3	3	3	2	20
P00261	Adjacent Former Hydra Tools, Nether Lane, Ecclesfield	Chapelton/ Ecclesfield	1.18	1.062	4	4	4	4	3	3	3	25
P00262	Adjacent to disused railway Butterthwaite Lane	Chapelton/ Ecclesfield	1.48	1.33	2	1	2	1	1	1	1	9
P00266	Ernest Thorpe's Lorry Park, Station Road, Deepcar	Stocksbridge/ Deepcar	0.95	0.855	2	2	3	3	2	2	2	16

P00270	Former Petrol Depot, Johnson Lane/ Station Road	Chapelton/ Ecclesfield	1.63	0.978	4	1	2	2	1	1	2	13
P00271	Station Road / Manchester Road, Deepcar	Stocksbridge/ Deepcar	1.38	1.38	5	2	3	2	2	1	1	16
P00273	G Fishers Transport Yard, Green Lane, Ecclesfield	Chapelton/ Ecclesfield	0.81	0	3	3	3	3	1	2	3	18
P00279	Next to Arthur Lee Works, Loicher Lane, Ecclesfield	Chapelton/ Ecclesfield	0.91	0.77	3	2	3	3	2	2	2	17
P00287	Smithywood, Cowley Hill, Chapelton	Chapelton/ Ecclesfield	32.42	30.799	5	5	4	5	4	5	5	33

P00370	New Street, Longacre Way	Mosborough/ Woodhouse	1.4	1.26	3	3	3	3	3	3	4	22
P00373	Meadowbrook Park	Mosborough/ Woodhouse	0.6	0.54	3	3	3	5	5	3	3	25
P00376	Mosborough Wood Business Park	Mosborough/ Woodhouse	4.16	4.16	4	3	3	4	4	3	3	24
P00386	Rotheham Road, Beighton	Mosborough/ Woodhouse	1.06	0.848	5	3	3	3	3	3	2	22
P00430	Rawson Spring Road	Upper Don Valley	0.63	0.56	3	3	3	4	3	3	3	22

New Site	Corus And Outokumpu Works, Ford Lane / Manchester Road / Hunshelf Road	Stocksbridge/ Deepcar	9.37	7.965	3	2	3	2	1	1	1	13
Existing Employment Sites												
P00017	Prospect Business Park, Carlisle Street East	Lower Don Valley	6.5	0	3	3	3	2	1	1	2	15
P00060	Egerton Street / Hanover Way	City Centre	0.38	0	4	3	5	3	2	3	3	23
P00426	Footprint Tools & Synters	City Centre	1.3	0	3	3	4	3	3	2	2	20

Potential Site Allocation

P00043	Carver Lane/Holly Street	City Centre	0.6	0.54	4	3	5	4	4	4	3	27
P00057	Doncaster St/Shepherd St	City Centre	1.1	0.99	5	5	5	4	4	4	3	30
P00083	Nelson Mandela Building, Pond Street	City Centre	0.27	0.23	4	4	5	4	4	4	4	29
P00121	West Bar Triangle	City Centre	2.63	0.5	4	4	5	4	3	4	3	27
P00129	Alsing Road	Lower Don Valley	2.79	2.511	5	5	4	4	2	3	3	26

P00470	Harmer Lane/Sheaf Street	City Centre	0.15	0.15	4	4	4	4	2	2	3	23
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