



Nathaniel Lichfield  
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Planning. Design. Economics.



# Brighton & Hove City Council **Employment Land Study 2012**

Final Report

December 2012





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December 2012

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## List of Abbreviations

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BHCC	Brighton & Hove City Council
BID	Business Improvement District
DA	Development Area
EGI	Estates Gazette
ELR	Employment Land Review
FDI	Foreign Direct Investment
GVA	Gross Value Added
HCA	Homes and Communities Agency
LEP	Local Enterprise Partnership
NPPF	National Planning Policy Framework
ODPM	Office of the Deputy Prime Minister
ONS	Office for National Statistics
SA	Sustainability Appraisal
SEEPB	South East England Partnership Board
SHMA	Strategic Housing Market Assessment
SME	Small and medium sized enterprise
TMT	Technology, media and telecoms
VAT	Value Added Tax
VOA	Valuation Office Agency



## Executive Summary

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This Employment Land Study has been prepared by Nathaniel Lichfield & Partners (NLP) on behalf of Brighton & Hove City Council. It is intended to inform preparation of the new City Plan Part One up to 2030 and subsequent development plan documents.

The study provides current information on existing employment sites and premises, local demand and supply information and indicates any need for changes to the City's approach to employment land as set out in the Draft City Plan. It assesses future space needs for B class employment uses (offices, industry and warehousing) under a range of different growth scenarios, including those based on economic growth, past development trends and future labour supply associated with the Draft City Plan housing target.

### Economic Context

Brighton & Hove is a tightly constrained and compact City situated on the Sussex coast between the South Downs National Park and the sea. The City has traditionally functioned as an economic growth hub for the wider sub-region, and has developed an increasingly knowledge-based economy, dominated by SMEs with particular strengths in creative media and technology.

The City has performed well in economic terms in recent years, proving relatively resilient through the recession and recording above average job growth over the last 15 years. A declining industrial sector in employment terms has been offset by steady office job growth. However, Brighton & Hove has historically underperformed in attracting inward investment, and faces challenges to maintaining high economic activity such as high levels of out-commuting and pockets of deprivation across the City. A number of ambitious local economic strategies and initiatives suggest that a step change is needed in order for the City to achieve its true economic potential and secure necessary investment.

### Current Stock of Employment Space

Brighton & Hove's stock of employment space is split evenly between office and industrial uses, with most office space concentrated in Central Brighton, and industrial space dispersed more widely across the City. The City's stock of employment space is greater than neighbouring areas, particularly with regards to office space, but is ageing with a lack of modern business premises relative to other parts of the region. Vacancy levels are generally low, particularly for industrial premises and higher quality, modern office accommodation.

Brighton & Hove has seen moderate levels of new development over the past decade, the majority for B1a/office uses. At the same time, it has been losing B class (largely industrial) space mainly to residential use, retail and D1 uses.

Coupled with the City's unique geographical constraints, greater availability of employment space in adjoining areas is likely to make it more difficult for Brighton & Hove to compete for new investment and relocations, or accommodate enquiries for employment space as they arise. Employment developments in adjoining authorities may compete with the City but also offer some potential in the event that demand cannot be met within the City boundary.

## **Commercial Property Market**

Demand for office space in the City remains strong – particularly for small units in Central Brighton and the station/Queen's Road area – despite a shortage of good quality, modern office space, with the majority of current stock comprising refurbished older buildings that are not suited to current business needs. Alongside funding/viability issues in the current market, this lack of supply could constrain future office based activity in the City.

There is also strong demand for industrial space in the City, predominantly for small units by local firms. Existing provision is also very limited and often in unsuitable locations. Very little new development has been completed in the last 10 years and there are indications that local firms may find it hard to expand or upgrade premises without moving out of the City.

The City's key assets of a highly skilled workforce, strong transport links and wider quality of life factors keep firms in the City, but an underlying shortage of good quality business accommodation threatens its longer term ability to attract and retain the business base and critical mass needed to achieve continued economic growth.

## **Review of Employment Sites Portfolio**

The suitability to meet future needs of 50 existing, allocated and non-allocated employment sites in the City was assessed. Brighton & Hove contains a reasonable range of employment sites of differing quality and type, the majority accommodating B1a and B1c uses with a small number of B2 and B8 uses.

The assessment process identified 11 (22%) high scoring good quality sites, 33 (66%) average quality sites and seven (12%) sites of poorer quality. The market attractiveness of sites was generally high, reflected by low vacancy rates. Even though a number of sites scored less well, all appeared to be meeting employment needs at some level.

## **Future Requirements for B Class Employment Space**

Future requirements for employment space were assessed under a range of economic scenarios and approaches, reflecting economic growth, development trends and potential housing supply factors (Table 1). Two of the three scenarios imply higher future economic growth in Brighton & Hove than the City has achieved in the recent past.

Table 1 Gross Floorspace Requirement by Scenario to 2030 (m<sup>2</sup>)

Use	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
Offices (B1)	112,240	78,960	45,270
Industrial (B1c/B2/B8)	43,430	75,600	81,950
<b>All B uses</b>	<b>155,670</b>	<b>154,560</b>	<b>127,220</b>

Source: NLP analysis \* totals rounded

The overall space requirements related to these different scenarios range from 127,220m<sup>2</sup> to 155,670m<sup>2</sup> of all types of employment space up to 2030, implying a need for between 18.8 ha and 24.4 ha of employment land.

The range of scenarios tested for the period 2010-2030 all exceed the total floorspace requirement identified in the 2006/09 employment land studies. While the requirements for office space are broadly comparable, scenarios tested for the 2012 study all indicate a positive requirement for industrial space, compared with a negative requirement in the 2006/09 studies. Given that the Draft City Plan does not currently identify nor specifically plan for any additional industrial floorspace, the Council should consider planning to accommodate at least the job growth requirement (43,430m<sup>2</sup>) whilst providing capacity within the City to meet the past take-up requirement (75,600m<sup>2</sup>).

Given an uncertain economic outlook, it is difficult to select the most likely option from these alternative growth pictures. However with regards to offices, the job growth scenario appears to best reflect the Council's economic vision for the City and is comparable to the 2006/09 study requirement and subsequent Draft City Plan target for new office space (96,000-121,000m<sup>2</sup>).

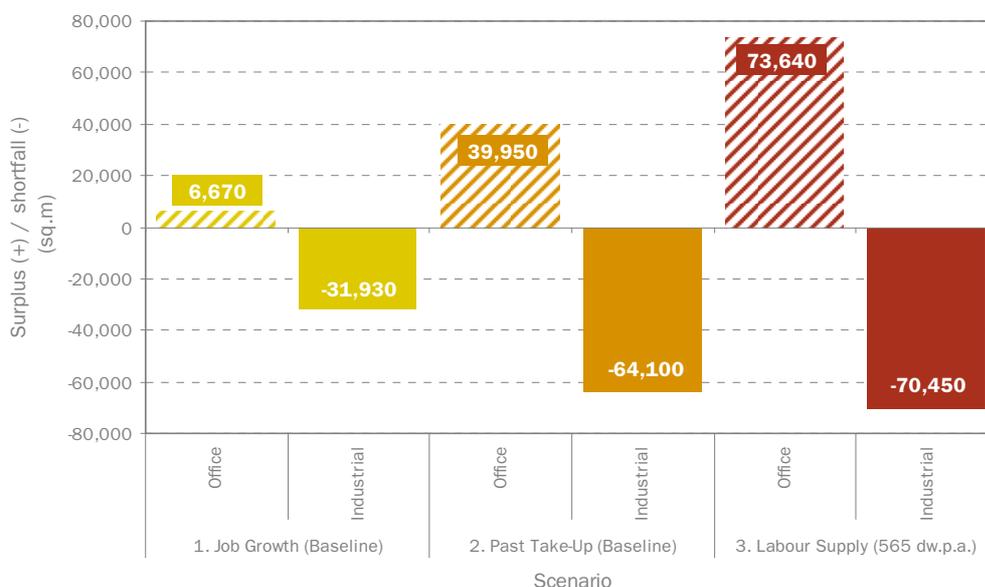
It is therefore recommended that the overall employment floorspace targets set out in the City Plan are updated to reflect the future requirements identified by the 2012 ELS study, to ensure that the final City Plan provides the framework to effectively address this need over the 20 years to 2030.

## Need for Additional Employment Land

The Draft City Plan identifies eight strategic Development Areas which together have the potential to provide 109,300m<sup>2</sup> of new employment floorspace over the Plan period. In addition, the Draft City Plan also identifies approximately 21,110m<sup>2</sup> of extant planning commitments for B1a office space, increasing the total potential supply of employment across the City to 130,410m<sup>2</sup>.

Comparing future requirements with the supply of employment land identified in the Draft City Plan suggests that while there is an adequate quantitative supply of office space to meet future needs to 2030 under various scenarios of future growth, the supply of industrial space is insufficient to meet future needs under all development scenarios (Figure 1).

Figure 1 Forecast surplus of office and industrial space to 2030 by scenario



Source: NLP analysis

Feedback from public consultation indicates a potentially lower overall future development capacity than the Draft City Plan currently assumes. Any subsequent reduction in available supply may result in a shortfall of office floorspace under one or more of the scenarios to 2030 and would significantly worsen the existing shortfall of industrial space.

From a qualitative perspective, the City's office market suffers from high vacancy of older, edge of centre office premises and lack of modern city centre space that occupiers increasingly demand. Any new office space allocated by the new City Plan should be located in areas of clear occupier demand that can provide longer term, viable development opportunities.

Whilst Brighton & Hove is not perceived as a major industrial location, demand for premises remains strong and all three scenarios indicate a continuing role for the City's industrial economy. The City's existing stock of industrial premises are also in need of modernisation and upgrading, although continued high occupancy and low vacancy prevent the churn that the market needs to remain competitive and attractive to firms.

## Policy & Delivery Implications

The Council's approach to employment land policy should aim to at least fully meet Brighton & Hove's employment space needs over the Plan period so that the City's economy is not unduly constrained. However, to ensure a flexible and responsive policy framework, it will be necessary to not just focus on meeting forecast quantitative requirements, but also to consider the opportunities and risks to the City's economy that flow from particular policies, including managing pressures from other uses.

In terms of future office needs, the identified quantitative requirement is of a similar order of magnitude to that currently identified in the Draft City Plan. In order to meet these needs, future policy must be underpinned by a clear strategy driven by what the market can deliver, the types of space required and the locations of strongest demand, with a clear focus on assembling a delivery trajectory for the Plan period which identifies a realistic delivery pipeline of employment sites over the short, medium and long-term. A key challenge that the Council must seek to manage is how to encourage greater delivery of office space, particularly in Central Brighton, but also structuring supply in other parts of the City to respond to market opportunities. Upgrading and renewal of the City's existing stock of office accommodation will also be important to ensure that this space remains attractive to the market, while opportunities to deliver small scale, managed and affordable work space should be maximised in order to encourage and retain indigenous business growth within the City.

This study's conclusion that there is a modest positive requirement for industrial space deviates from the earlier employment land studies which had a more negative outlook. For this reason, very limited specific provision is currently provided in the Draft City Plan for additional industrial space. This quantitative requirement is supported by the qualitative feedback that the City is perceived as "full up" for industrial activities. There are a number of potential options for how additional supply might be provided:

- 1 Increase the industrial floorspace capacity assumed on those Development Areas already identified for industrial activities;
- 2 Explore opportunities to deliver industrial floorspace in other Development Areas such as DA3 (Lewes Road) or DA7 (Toads Hole Valley);
- 3 Consider the scope to achieve a net gain in employment floorspace (rather than no net loss) on employment-led mixed use redevelopment sites, and/or rely on general intensification of existing industrial sites;
- 4 Not specifically identify additional capacity for industrial space, assuming that these needs are met elsewhere.

The need to encourage upgrading and renewal of existing space should also be explored, alongside the provision of a range of affordable workshop space for small, high growth start-up businesses, through re-developing/converting existing sites and working with developers to provide small units within larger employment, residential or mixed use schemes where appropriate.

Within the context of acute capacity constraints, difficulty in identifying any readily available 'new' sites, and in a situation whereby the City Plan Part One is unable to fully meet the identified needs of B class sectors in quantitative and qualitative terms, it will be important for the City Plan Part Two to give consideration to how these needs can be met to ensure that the City can accommodate future business growth and achieve its economic potential.



## 1.0 Introduction

1.1 Brighton & Hove City Council (BHCC) commissioned Nathaniel Lichfield & Partners (NLP) to prepare an assessment of the City’s employment space requirements to 2030. It is intended to inform preparation of the new City Plan Part One (publication stage) and subsequent development plan documents.

1.2 The main elements of the employment land review involve these stages:

- **Stage 1: Taking Stock of the Existing Situation:** analysis of the economic strengths and weaknesses of the local economy, functional economic area, and an assessment of the fitness for purpose of the portfolio of designated employment sites along with a sample of non-allocated sites;
- **Stage 2: Assessing Future Requirements:** testing the implications of different population/household growth scenarios on future employment space requirements for the City, including latest economic forecasts and the Draft City Plan’s housing target;
- **Stage 3: Identifying a Site Portfolio:** analysing the suitability and deliverability of sites available to meet future needs under each growth scenario, which sites should be retained for employment uses and which released for alternative uses, and any need for additional sites.

## Scope of Study

1.3 The focus of this report is on the employment space needs for the group of B-class sectors outlined below:

- **B1 Business** (offices, research & development, light industry);
- **B2 General Industrial;** and
- **B8 Storage or Distribution** (wholesale warehouses, distribution centres).

1.4 Demand for B-class employment land and floorspace is considered in this report, and references to “employment space” are intended to mean both these elements. Industrial space in this report includes both manufacturing and distribution uses.

1.5 Whilst the National Planning Policy Framework (NPPF) defines economic development as including a wider range of non B-class uses (including retail, leisure and community uses), an assessment of these uses is beyond the scope of this study.

1.6 The purpose of this study is to provide evidence to support development of the City Plan. It is not a policy or strategy document per se, but instead provides an evidence base input to specific planning or economic development policies being developed by the City Council. An important consideration for any work of this type is that it is inevitably a point-in-time assessment that cannot entirely reflect very recent changes in circumstances. This study has incorporated the

latest data and other evidence available at the time of preparation. The accuracy and sources of data derived from third party sources has not been checked or verified by NLP.

- 1.7 As part of the study, consultation was undertaken with a range of stakeholders including commercial agents, economic development and business organisations. A list of consultees is included at Appendix 1. A business consultation workshop comprising a presentation of interim findings and structured group discussion was held in Brighton in October 2012. Notes of this event are contained in Appendix 2.

## Structure of Report

- 1.8 The report is structured as follows:
- **Economic Context** (Section 2.0) – a review of current economic conditions and recent trends in the City and its economic strengths and weaknesses that may affect future needs for employment space;
  - **Overview of Employment Space** (Section 3.0) – analysis of the current stock and trends of employment space in the City in terms of mix of uses, development rates, gains and losses, age of premises, and provision in adjoining local authority areas;
  - **Brighton & Hove Commercial Property Market** (Section 4.0) – A review of the local commercial property market, including the supply of and demand for different types of employment space within the City and the needs of different market segments;
  - **Review of Current Employment Sites Portfolio** (Section 5.0) – assessment of the quality of current and potential employment land supply against defined criteria including its attractiveness to the market and its ability to meet future needs;
  - **Future Requirements for B Class Employment Space** (Section 6.0) – estimates of future employment space requirements for B Class sectors in quantitative terms, drawing on employment forecasts and other factors;
  - **Need for Additional Employment Land** (Section 7.0) – assesses the gap between current land supply and future needs, in both quantitative and qualitative terms, by comparing forecast requirements with availability of existing sites;
  - **Policy & Delivery Implications** (Section 8.0) – considers policy and other measures needed to support the existing site portfolio and maximise economic growth in Brighton & Hove; and
  - Overall **conclusions and implications** are presented in Section 9.0.

## 2.0 Economic Context

2.1 This section establishes the economic context for the study by reviewing recent economic conditions and trends within the City of Brighton & Hove, relative to the South East region and the national economy. This is important in identifying the existing strengths and weaknesses of the local economy, and the factors likely to influence the nature and level of future demand for employment space within it.

### Overview

2.2 Brighton & Hove is a tightly constrained and compact City situated on the Sussex coast between the South Downs National Park and the sea. These natural boundaries effectively define and limit the outward expansion of the City. According to the 2011 Census, the City's population stands at 273,400. Brighton & Hove lies 70km from central London, 77km from Portsmouth to the west and 47km from Gatwick Airport to the north. The local authority area covers 87 square kilometres, of which approximately half is built up.

Figure 2.1 Context of Brighton & Hove



2.3 Beyond the main urban areas of Brighton & Hove where the majority of employment is situated, the local authority area also contains the smaller settlements of Woodingdean, Ovingdean, Saltdean, Patcham, Hangleton, Mile Oak, Moulsecomb, Portslade, Bevendean and Rottingdean.

2.4 Brighton & Hove is a regional transport hub and benefits from excellent mainline rail links to London as well as local rail services to Southampton,

Portsmouth and Ashford. The A23, via the M23, provides links to London and the M25, and the A27 provides transport links to the east and west. Eight stations serve the rail network within the City boundary. Brighton & Hove is also well located for Gatwick Airport, Shoreham Airport (for business aviation services) and the Port of Newhaven (approx 14 km) provides ferry services to Dieppe.

- 2.5 The City has traditionally functioned as an economic growth hub for the wider sub-region, and over recent decades Brighton & Hove has evolved to become an increasingly knowledge-based economy with particular strengths in creative industries such as media and technology. Brighton & Hove also functions as a major tourism and conference destination, with some 7.1 million day visitors and 1.4 million overnight visitors recorded in 2010.<sup>1</sup>

## Planning Policy Context

### National Planning Policy Framework

- 2.6 The National Planning Policy Framework (NPPF) became effective on 27 March 2012, replacing all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance notes (PPGs) with a single national planning policy document.
- 2.7 It places strong emphasis on sustainable development and the role of planning in supporting national economic growth. Economic, environmental and social gains are sought jointly and simultaneously through both plan-making and decision-taking to achieve sustainable development. Paragraph 17 of the NPPF sets out 12 Core Planning Principles. The most relevant of these states that planning should:
- “Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs...”*
- 2.8 In paragraph 18, the NPPF notes the Government’s commitment to securing economic growth, jobs and prosperity to meet global competition and a low carbon future. It also indicates the planning system should do *“everything it can to support sustainable economic growth”* and that economic growth should be given significant weight in planning decisions. Existing business sectors and their expansion are to be supported and policy flexibility should apply to enable business needs not anticipated in the development plan to be accommodated (paragraph 21).
- 2.9 Paragraph 22 highlights the need to regularly review the demand for and suitability of employment land allocations:

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<sup>1</sup> The Economic Impact of Tourism – Brighton & Hove 2010, Tourism South East

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

- 2.10 Overall, economic growth is a strand that underpins most policy areas within the document, and the NPPF places significant responsibility on local planning authorities to plan positively for economic growth, both directly and in creating the wider conditions to support it.

### **Brighton & Hove Draft City Plan (Part One)**

- 2.11 BHCC originally submitted its Core Strategy to the Secretary of State in 2010, however this was formally withdrawn in September 2011 to allow it to be updated and amended. This reflected issues regarding the housing delivery strategy in the submitted document, and in the context of the Government's announcement regarding the revocation of Regional Strategies.
- 2.12 BHCC have drafted and recently consulted on a new City Plan (Part One) which will provide the overall strategic vision for the future of Brighton & Hove to 2030, setting out how the Council will respond to local priorities, meet the challenges of the future and identify the broad locations, scale and types of development needed together with the supporting infrastructure.
- 2.13 As part of this consultation process, an Employment Policy Options Paper was published in October 2011 which considered in more detail the key employment land issues that the City Plan would need to address. It set out a number of options to address the issues along with the main advantages and disadvantages of each option.
- 2.14 These options were subject to an independent Sustainability Appraisal (SA) which critically examined and tested the options against the principles of sustainable development. The Council's resulting preferred options are summarised in Table 2.1.

Table 2.1 Preferred Employment Policy Options

Employment Policy Issue	Preferred Option
<b>Issue 1</b> - Recognition and support of the City's primary office area	Specifically identify and safeguard Central Brighton as the City's primary office area
<b>Issue 2</b> - Accommodating the need for 20,000 sq m additional office floorspace	Identify and allocate a range of sites to accommodate the forecast need for an additional 20,000 sq m of office floorspace within the New England Quarter and London Road Development Area as a more flexible and viable way of bringing forward new office floorspace
<b>Issue 3</b> - Maintaining an adequate supply of appropriate, affordable office accommodation	Set out a general policy of protection for secondary office accommodation unless redundancy proven but require reuse for alternative employment generating uses and/or affordable housing only
<b>Issue 4</b> - More specific mention of strategic employment sites and their roles within Development Areas	Specific allocation of strategic employment sites and their roles within Development Area proposals
<b>Issue 5</b> : An appropriate hierarchy and protection of industrial estates and premises	Identify a hierarchy of industrial estates/ premises by allocating in the City Plan those sites which will continue to be safeguarded for business, manufacturing and warehouse use and also allocating those assessed as suitable for employment-led mixed use development
<b>Issue 6</b> - Maintaining an adequate supply of appropriate, affordable business, manufacturing and warehouse accommodation	Safeguard secondary employment sites to ensure a good supply of appropriate employment land available for a broad range of business types to serve the City's needs

Source: Brighton & Hove City Council

- 2.15 The Draft City Plan sets out the Council's overall objective for the economy (Strategic Objective 2) as follows:
- “Support the continued improvement of the economic performance of the city by identifying and safeguarding an appropriate range of sites and premises to meet the demands of high growth and key employment sectors and ensuring there is a well trained and suitably skilled local workforce.”*
- 2.16 Brighton & Hove does not have the industrial heritage of other cities and therefore the supply of employment land and premises in the City is limited. The spatial strategy set out in the Draft City Plan therefore seeks to ensure that employment sites across the City are safeguarded and upgraded, and through the regeneration of key sites allow for new employment floorspace to be created. In order to achieve the City Plan's proposed housing target, some employment sites have been identified to bring forward a mix of housing and employment floorspace.

- 2.17 The CP3 Employment Land policy states, “*sufficient employment sites and premises will be safeguarded in order to meet the needs of the city to 2030 to support job creation, the needs of modern business and the attractiveness of the city as a business location*”. In order to achieve this, the City Plan will:
- Identify strategic proposals and allocations for new B1 employment floorspace across seven ‘Development Areas’;
  - Identify Central Brighton as the City’s prime office location where B1a offices will be protected;
  - Protect the City’s 13 primary industrial estates and business parks for business, manufacturing and warehouse (B1, B2 and B8) use;
  - Allow employment-led (residential and employment) mixed use development on five secondary employment sites.

## Economic Conditions and Trends

- 2.18 Current economic conditions and trends in Brighton & Hove are summarised below, with comparisons made, where appropriate, with regional and national averages. Data is from published Office for National Statistics (ONS) sources via Nomis unless indicated otherwise.

### Employment

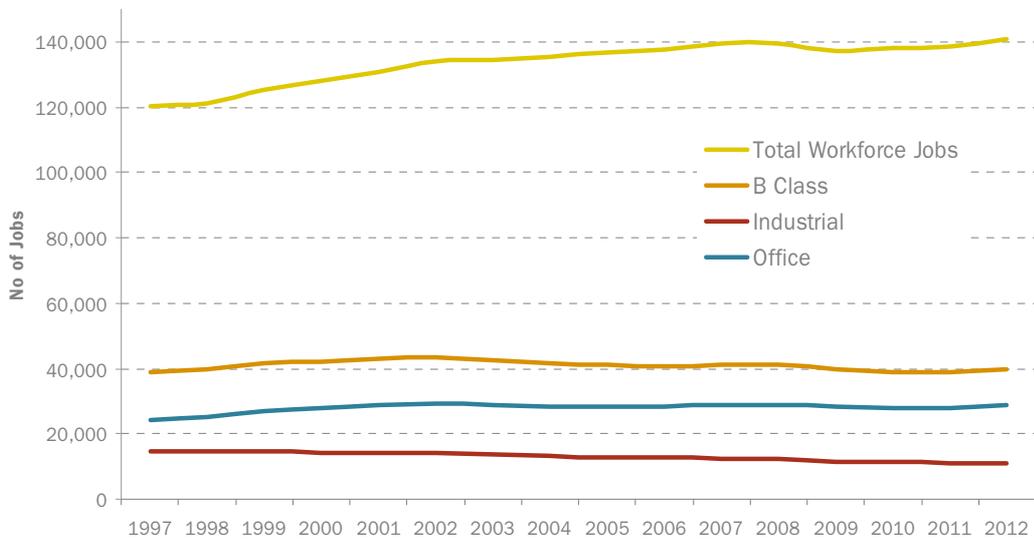
- 2.19 The overall population of Brighton & Hove, currently 273,400<sup>2</sup>, grew by some 10.3% between 2001 and 2011, higher than both the South East (7.9%) and national (7.9%) averages. The number of workforce jobs in the City was 140,670 in 2012<sup>3</sup>, representing an increase of 16.8% from its 1997 level, outpacing growth in the wider South East region (12.2%) and national employment growth over this period (11.2%). In terms of the recession, Brighton & Hove underwent a contraction of about 1,500 workplace jobs in overall terms during the period 2007-2010, but this has since stabilised with net job gains registered since 2011.
- 2.20 The proportion of B class jobs (i.e. offices, industrial and warehousing activities) in the City has remained relatively constant over the last 15 years, representing between 28% and 33% of all jobs in Brighton & Hove. B class jobs peaked at 43,600 in 2002 and have since declined slightly, standing at approximately 39,900 in 2012. During this period, office jobs have gradually represented an increasing contribution of all B class jobs (Figure 2.2).

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<sup>2</sup> Census 2011 data

<sup>3</sup> Experian 2012

Figure 2.2 Total Workforce and B Class Jobs in Brighton &amp; Hove, 1997-2012



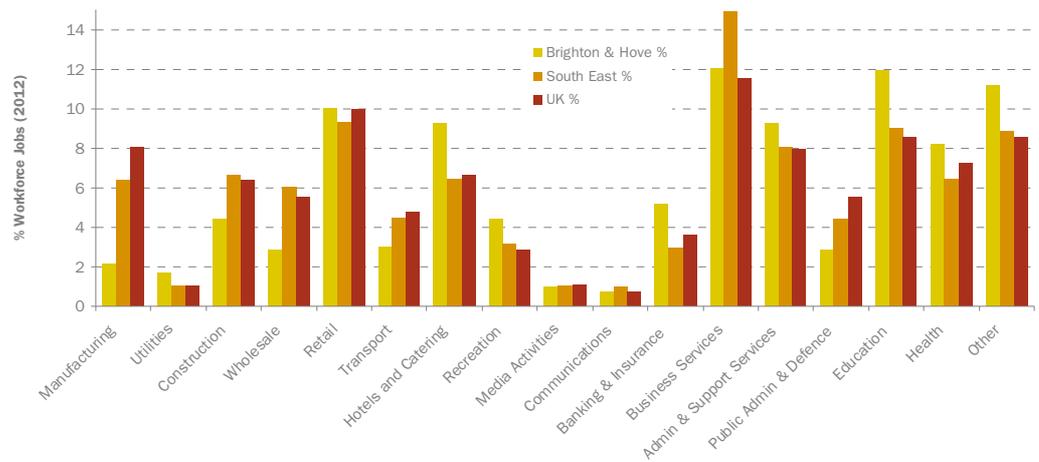
Source: Experian / NLP analysis

- 2.21 In employment terms, the City's largest sectors in 2012 are business services (12%), education (12%) and other (including social work – 11%) with retail (10%), admin and support services (9%) and hotels and catering (9%) also important (Figure 2.3). A strong representation of the education and health sectors suggests that the City is more reliant upon the public sector for employment than other locations in the South East, although this reflects the presence of a number of large employers such as the Hospital and universities.
- 2.22 For the purposes of analysis, the City's strong creative industries cluster – which is estimated to support nearly 16,000 jobs and represents just under 11% of all employment within Brighton & Hove<sup>4</sup> – falls within the business services and media activities sectors identified in Figure 2.3. Activities associated with another of the City's key growth sectors, environmental technology, fall within a number of sectors including manufacturing, construction, utilities and professional services, although in employment space terms tend to have a more industrial focus.
- 2.23 Manufacturing, wholesale and business services sectors are under-represented compared with the regional (South East) average. The City also has a higher proportion of employment in public sector jobs<sup>5</sup> (23%) than the South East (20%) and nationally (21%).

<sup>4</sup> Brighton & Hove Creative Workspace Study 2007-2017

<sup>5</sup> Public admin and defence, education and health

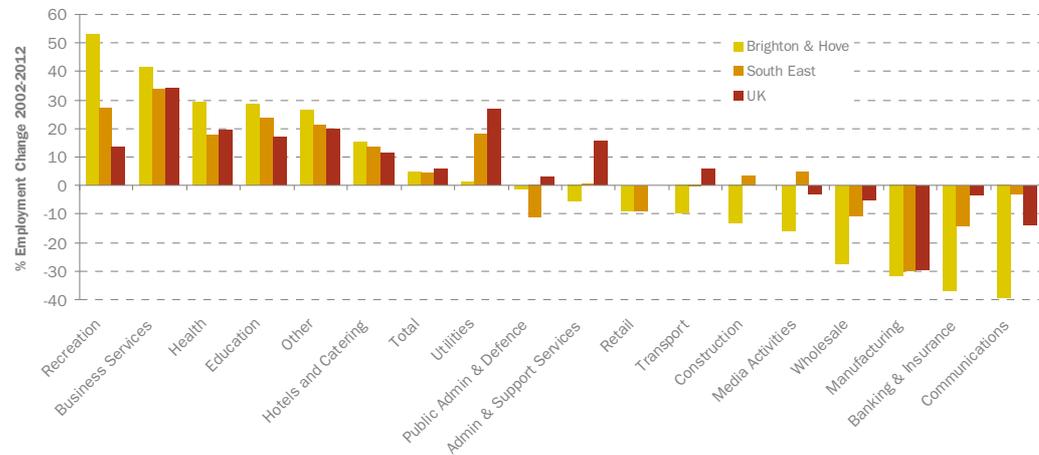
Figure 2.3 Main Economic Sectors in Brighton & Hove by share of employees, 2012



Source: Experian / NLP analysis

2.24 Over the last decade, the largest contributors to job growth in the City have been recreation, business services, healthcare and education, where the City outperformed regional and national growth rates. At the same time, the City saw significant job losses in communications, banking & insurance and manufacturing (Figure 2.4).

Figure 2.4 Employment Change in Brighton & Hove by Sector, 2002-2012



Source: Experian / NLP analysis

## Productivity

2.25 Productivity (measured by Gross Value Added (GVA) per worker) within Brighton & Hove’s labour force is also relatively low compared with regional and national averages due in part to the City’s relatively low representation of high value, knowledge intensive activity.

- 2.26 Whilst average GVA generated by workers in Brighton & Hove (£36,570) is higher than other South Coast centres such as Southampton and Eastbourne, it falls well below comparator economic centres within the South East including Croydon (£39,090) and Reading (£45,760), as well as adjoining districts of Lewes (£37,370) and Adur (£38,100) (Table 2.2).

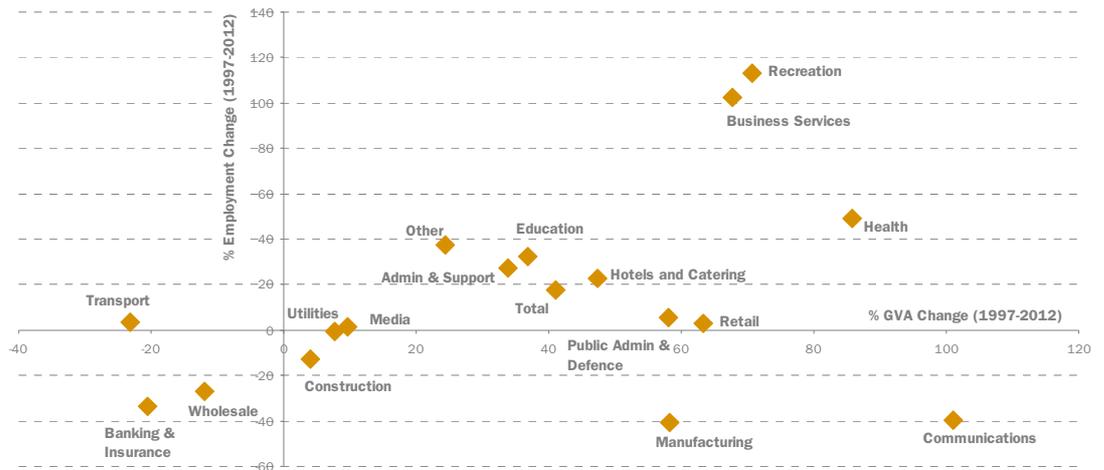
Table 2.2 Average GVA per Worker

Location	GVA Per Worker
Brighton & Hove	£36,570
Southampton	£35,730
Eastbourne	£32,600
Lewes	£37,370
Adur	£38,100
Croydon	£39,090
Reading	£45,760
City of London	£90,890
South East	£40,890
UK	£39,280

Source: Experian 2012 / NLP analysis

- 2.27 This may reflect the concentration of lower value retail, leisure and hospitality employment within Brighton & Hove and indicates significant scope to enhance the City's productivity levels and output in future.
- 2.28 This issue is identified in the Draft City Plan which sets out amongst its key objectives that the City must protect and provide for good quality jobs. This could in part be driven by a number of key sectors which have been identified for growth such as digital media, creative industries, finance, health and environmental technologies, all of which have a growing presence in the City.
- 2.29 Figure 2.5 presents employment and GVA growth over the last 15 years (1997 – 2012) by sector in Brighton & Hove. It shows that in terms of employment growth, recreation and business services and to a lesser extent the health and education sectors, have made the most significant contribution to the City's economy in recent years. Meanwhile, communications, health and retail recorded highest GVA/output growth over the past 15 years, with manufacturing and public administration and defence also making a significant contribution. At the same time, the financial and wholesale sectors recorded simultaneous employment and GVA decline, reflecting its declining importance within the City's economy.

Figure 2.5 Employment and GVA Growth in Brighton &amp; Hove (1997-2012)



Source: Experian 2012 / NLP analysis

## Business Demography

- 2.30 Looking at the size of businesses in Brighton & Hove, the City has a higher proportion of small firms with 1-9 employees (90.6%) than the regional (89.2%) and national (88.3%) averages, and relatively fewer large firms.
- 2.31 Between 2004 and 2010, the number of VAT registered firms in the City grew by around 6%, a rate slightly above that of the South East region (4.5%) and similar to the UK average (6.5%). With 80 new VAT registrations per 10,000 working-age population in 2010, the City's rate of new business formation in 2010 was also much higher than regional (68) and national (58) averages. Brighton & Hove also has a higher than average rate of self-employment, with 12.5% of the working-age population falling within this category compared with 10.6% in the South East and 9.4% nationally in 2012. These indicators suggest reasonably good levels of entrepreneurial activity in Brighton & Hove.

## Labour Market

- 2.32 Brighton & Hove's economic activity rate, the proportion of working age residents in or seeking employment, at 77% is lower than the South East (79.4%) rate but slightly higher than the national (76.5%) figure. This suggests some scope to further expand local labour supply from existing residents.
- 2.33 Claimant unemployment has increased by around 40% in Brighton & Hove since the start of the recession in early 2008 to 3.5% in July 2012. While the City's rate compares favourably with the national average (3.8%), it remains significantly higher than the South East average (2.5%), a pattern that has prevailed historically (Figure 2.6). On the wider Annual Population Survey

Measure<sup>6</sup>, the City's unemployment rate is higher at 7.6%, again comparing favourably with the national average (8.1%) but remaining above the regional (5.9%) rate.

Figure 2.6 Claimant unemployment Jan 2008 to July 2012



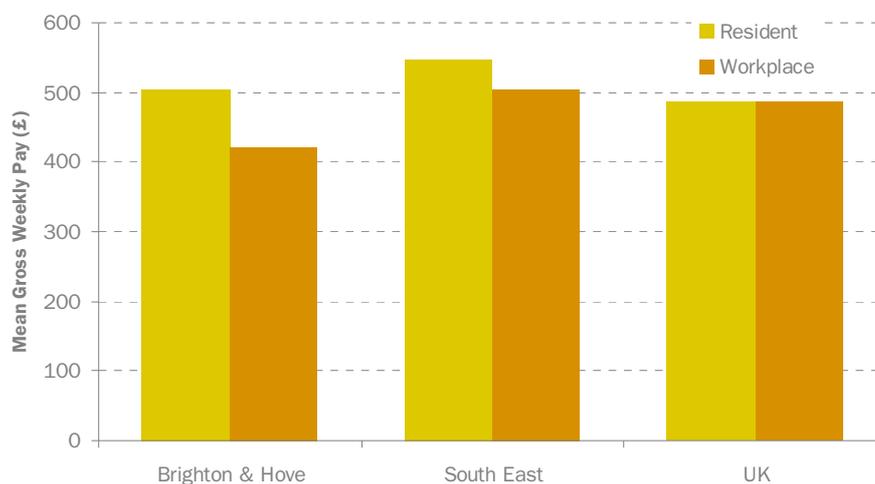
Source: Nomis 2012

- 2.34 In July 2012 there were six claimant unemployed workers for every unfilled job centre vacancy in the City. This was double the ratio for the South East (3.0) and also higher than the equivalent ratio for Great Britain (4.4) indicating a less tight labour market locally than elsewhere, and potential issues for some local residents to find suitable work.
- 2.35 Brighton & Hove's resident workforce has higher than average levels of job skills when compared to the South East region and Great Britain as a whole, with an above average proportion of residents employed in higher skilled, higher earning occupations.
- 2.36 Turning to the types of jobs required in the City, the most sought-after occupations amongst claimant unemployed workers are 'Sales & Customer Service occupations', followed by 'elementary occupations', and 'Associate Professional and Technical Occupations'. However, in general there was a slightly higher proportion of unemployed residents in Brighton & Hove seeking higher-skilled managerial and professional jobs and a slightly lower proportion seeking lower-skilled jobs than in the South East and Great Britain as a whole.
- 2.37 As Figure 2.7 illustrates, wages for those working within the City (workplace) are slightly lower than those for people who live in the City (resident). This is likely to reflect the significant levels of out-commuting by the City's residents to

<sup>6</sup> This measure records all those searching for work but who are currently unemployed regardless of whether they are claiming job-seekers allowance or not

higher-paid jobs in London and elsewhere within the South East. It also reflects that workplace wages in Brighton & Hove (£421 per week) are low compared with the South East (£504 per week) and the UK (£487 per week) as a whole. This indicates the types of jobs available locally are much less well paid than elsewhere in the region and the country.

Figure 2.7 Mean Gross Weekly Earnings



Source: Annual Survey of Hours and Earnings 2011

- 2.38 Despite performing strongly across a range of economic indicators over the past decade, parts of Brighton & Hove experience relatively high levels of deprivation. The City is ranked as the 67<sup>th</sup> most deprived local authority area out of 326 in England<sup>7</sup>, which places it just outside the top 20% most deprived areas. Long term unemployment and worklessness remain entrenched in pockets of deprivation around the City, for example in the areas of Woodingdean, Hangleton, Knoll and Whitehawk.

### Inward investment

- 2.39 Although very limited data on inward investment or inquiries is recorded and/or is available, in general, Brighton & Hove has traditionally underperformed in terms of attracting inward investment to the City. However, according to the Brighton & Hove Business Retention and Inward Investment Strategy<sup>8</sup> the value of the inward investment projects it does attract is disproportionately strong, and the City has seen a number of significant inward investors relocating to its economy in recent years, including Disney, Second Life and those associated with the gaming industry.

<sup>7</sup> Indices of Multiple Deprivation 2010

<sup>8</sup> Business Retention & Inward Investment Strategy and Implementation Plan, March 2009

## Knowledge-based industries

- 2.40 Knowledge-based industries are those sectors of the economy where value-added is derived from the intensity and accumulation of knowledge, often fostered through innovation and increasing use of technology. Firms within this sector tend to grow faster and have greater future potential than other sectors and so are considered an important indicator of an economy's competitiveness and future growth prospects.<sup>9</sup> Only 25% of Brighton & Hove's businesses were knowledge-based in 2008 – about half way between the South East (27.7%) and national (21.8%)<sup>10</sup> rate. This suggests the City is under-represented in the types of businesses that are more likely to generate future growth.

## Functional Economic Area

- 2.41 Examining commuting flows can help in defining the functional economic market area of a particular local economy.<sup>11</sup> In 2001, some 28.5% of Brighton and Hove's working residents worked outside the City indicating a very high rate of out-commuting. In total, over 33,500 residents work elsewhere, predominantly in the adjoining areas of Crawley (13.1%), Lewes (11.8%), Mid Sussex (11.4%) and Adur (10.2%) (Figure 2.8). London also accounts for a significant proportion (22%) of all out-commuting from Brighton & Hove and although the capital is beyond the City's immediate functional economic area, this significant out-flow means that the City maintains strong economic links with London.
- 2.42 At the same time, approximately 28,200 workers commuted into Brighton & Hove, predominantly from the adjoining districts of Lewes, Adur, Worthing and Mid Sussex. On this basis, Brighton & Hove is a net exporter of labour, with a net outflow in the order of 5,300 residents, some 5% of its resident workforce.

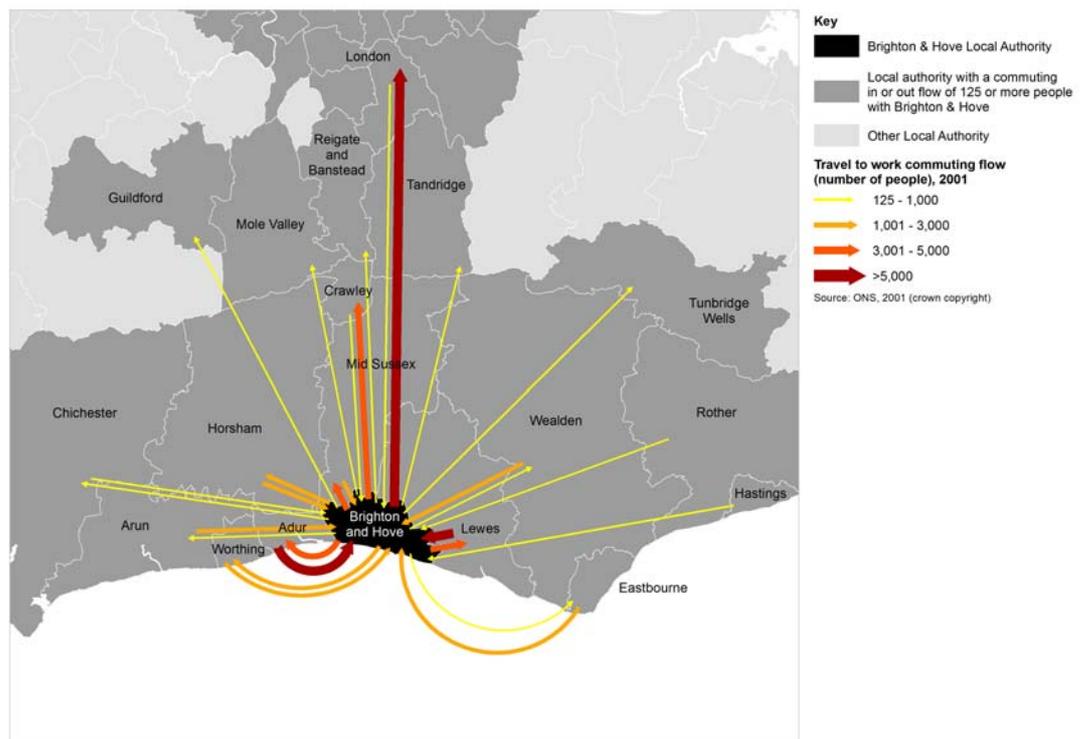
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<sup>9</sup> Based on definition adopted by the Organisation for Economic Co-operation and Development (OECD), includes high-technology manufacturing such as pharmaceuticals, computers and aerospace, and services such as telecommunications, financial intermediation, computing and research and development.

<sup>10</sup> UK Competitiveness Index, 2010

<sup>11</sup> Functional Economic Market Areas: An economic note, CLG 2010

Figure 2.8 Brighton &amp; Hove travel-to-work linkages, 2001



Source: Census 2001

## Economic Strategies & Initiatives

2.43 This section provides a brief review of relevant economic development strategies and background documents insofar as they relate to the potential future economic direction and employment space requirements in Brighton & Hove.

### Raising Our Game – the Economic Strategy for Brighton & Hove, 2008-2016

2.44 The current Brighton & Hove Economic Strategy, 'Raising our Game' (2008) was produced by the Economic Partnership with the support of BHCC and other key stakeholders in the City. It identifies three over-arching themes that the City should focus on in order for Brighton and Hove's businesses to grow and provide the jobs that the City needs for the future:

- have something **distinctive** to offer the world;
- be **ambitious** to succeed and grow the economy while protecting the environment; and
- be committed to **reducing inequality** by increasing opportunity.

2.45 It emphasises the importance of harnessing talent and innovation within the universities, attracting and retaining talented people; developing an environment that supports the creation of higher level jobs; and making best use of land within the City to support sustainable, high growth employment.

2.46 The strategy recognises the City's rapidly expanding niche digital media sector and the role it could play in supporting Brighton & Hove to become a capital of innovation. It identifies a number of sector strengths/opportunities that the City should focus on in achieving future job growth, including:

- support the growth of the creative industries sector to become globally competitive, with particular reference to digital media; and
- raise awareness of and grow the intellectual cluster of environmentally focussed businesses operating within the City, in particularly those engaged in environmental technology.

2.47 These objectives fall within the wider context of business growth and provision of higher value jobs in the City.

2.48 Spanning the period 2008-2016, the current strategy was conceived before the recession and does not reflect the challenges brought about by the economic downturn. As a result, it is currently being reviewed and refreshed in order to better respond to the new economic realities faced by the City.

#### **Brighton & Hove City Employment and Skills Plan, 2011-2014**

2.49 The overall objective of the City Employment and Skills Plan (2011-2014) is to support the creation of at least 6,000 new jobs by 2014 in Brighton & Hove by setting the conditions for job creation but also by doing more to equip local residents to compete for work within the City's labour market. It outlines challenges to support business development and to create higher value added jobs that better reflect the high qualifications profile of the City's residents. To this end, the Plan identifies three priorities:

- Priority 1: Promote the City's employment and skills needs to internal and external partners and agencies
- Priority 2: Support the creation of at least 6,000 new jobs by 2014
- Priority 3: Ensure that local residents are equipped to compete for jobs in the City's labour market

2.50 The Plan recognises that the City's business accommodation stock and employment land are consistently cited as barriers to business development, and, therefore, employment growth, with evidence suggesting that some City employers in growth sectors have been lost because of a lack of suitable employment space. It emphasises that if the City cannot provide the accommodation and space that its businesses need, it must establish close relationships with neighbouring authorities in the LEP area, to ensure that they are retained within the functional economic area.

#### **Business Retention and Inward Investment Strategy, 2009**

2.51 The Council's Business Retention and Inward Investment Strategy sets out plans to attract new investment into Brighton & Hove, and safeguard existing businesses and employment. It recommends a focus on business retention and retaining talent, focusing on the development of existing sector strengths such

as computer and related activities, high technology manufacturing, retail and business services (including the creative industries).

2.52 The strategy also suggests that amidst a period of slowdown in inward investment activity, any investment (particularly on a major scale) is likely to build on existing performance / track record. For example, the gaming industry and associated software activities is a local niche area that could be built on and promoted through the articulation of an appropriate proposition. On that basis, the City has a number of key strengths making it attractive as a potential location for investment:

- location on the south coast, proximity to central London and Gatwick airport makes Brighton & Hove ideally placed to take advantage of opportunities in mainland Europe, the United States and beyond;
- recognised as a Centre of Excellence in a number of areas of research, with two universities helping to maintain a large well educated workforce and provide an essential link to technology and innovation; and
- high quality of life offer.

2.53 Work is currently underway to create a City Prospectus for Brighton & Hove which will develop an inward investment proposition for the City, focusing on both its generic assets and sector specialisms, and a framework for handling inward investment enquiries and on-going client management support.

#### The Creative Industries Workplace Study 2007-2017

2.54 The City's Creative Industries Workspace Study maps out the existing and future requirements needed by Brighton & Hove's thriving creative industries sector. It estimates that the sector has 1,500 businesses and provides nearly 16,000 jobs in the City (approximately 11% of all employment), but that rapid growth has put increasing pressure on the need to provide additional employment floorspace.

2.55 It recognises that while 60% of the creative industries sector requires premises other than traditional office space, the City lacks certain types of buildings such as storage, warehousing, and light industrial premises. It recommends that the current supply of creative workspace is increased and in the absence of industrial properties, this space will need to be created from conversions or as new builds.

2.56 The study suggests that there is an overall demand for an additional 1.3 million square foot of floorspace over the next decade to accommodate the expected growth associated with the creative industries up until 2017. However, the 2009 Employment Land Study Update for Brighton & Hove notes that this floorspace figure is based on a number of assumptions and may represent an over-estimate of the effective demand likely to emerge from this sector over the next few years.

## Coast to Capital LEP Strategy for Growth, 2012

2.57 The Coast to Capital Local Enterprise Partnership (LEP) area includes Brighton & Hove, Croydon, the Gatwick Diamond, Lewes and West Sussex. The strategy presents an overall vision to create an outward facing, high performing international business economy, with a reputation for being a good place to do business. In order to achieve this vision, the LEP has adopted two strategic objectives to:

- increase level of enterprise and entrepreneurship; and
- increase levels of business internationalisation.

2.58 The strategy recognises that in order for enterprise and business internationalisation to thrive, the right business environment and the right infrastructure is crucial. Consultation identified business and employment locations and planning as a key area for the LEP to focus its attention.

2.59 Following an initial mapping exercise of strategic employment development sites (of which a significant proportion fall within Brighton & Hove), Coast to Capital is in the process of developing a strategic view of employment sites within the LEP area and will then complete an analysis to look at potential job numbers, key employment sectors, barriers and blockages. This will help to shape any potential Coast to Capital support/intervention with partners and investors on these sites.

## Future of Business 2011, Brighton “Supercity”

2.60 The Future of Business 2011 is a recent report produced by HSBC identifying where the future potential of our companies, entrepreneurs and industry lie. It highlights Brighton as one of the British cities that has potential for ‘Super City’ status and has become a vital hub for new growth industries. In particular, the report identifies Brighton as an ‘alternative economy super-city’ and a dynamic centre for innovative companies forging novel ways of doing business.

## Conclusions

2.61 Drawing together the above analysis, the City’s economic strengths and weaknesses, together with potential opportunities and threats, which will influence future demand for employment space are summarised in Table 2.3.

2.62 The City has recorded significant job growth over the last 15 years (16.8%), outperforming both regional and national trends and has proved relatively resilient through the recession. The proportion of B class jobs have remained largely constant over this period, with declining industrial employment offset by office job growth.

2.63 Brighton & Hove’s key sectors of business services, education and retail have experienced significant employment growth over the last decade. At the same time, significant job losses were recorded in communications, banking & insurance and manufacturing.

- 2.64 The City's business base is dominated by SME's with high levels of business start-up and self employment. However, due to its relatively low representation of high value, knowledge intensive activity, Brighton & Hove's economy is characterised by below average productivity/GVA. The City has historically underperformed in attracting inward investment, in doing so losing out on an important source of economic growth.
- 2.65 Although Brighton & Hove's residents hold higher than average workforce skills and occupations, the City's labour market continues to face a number of challenges to maintain high economic activity and low unemployment. Significant levels of out-commuting results in stark contrasts between workplace and resident earnings, while deprivation remains entrenched in pockets of the City such as East Brighton, Moulsecoomb and Bevendean.
- 2.66 A range of ambitious local economic strategies and initiatives emphasise the need to attract and retain talent, develop an environment that supports the creation of higher level jobs, and make best use of land within the City to support sustainable, high growth employment. These strategies suggest that whilst Brighton & Hove has a solid base upon which to build a strong and prosperous economy, a step change is needed in order for the City to achieve its true economic potential.

Table 2.3 SWOT Analysis of the Brighton &amp; Hove Local Economy

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Above average skills amongst local residents</li> <li>• Good transport links, particularly to London, M25 and Gatwick Airport</li> <li>• Strong population growth (both historically and projected) – particularly working age</li> <li>• Strong quality of life, tourism, cultural and heritage offer</li> </ul>	<ul style="list-style-type: none"> <li>• Reliance on public sector for employment</li> <li>• Underperformed in attracting inward investment</li> <li>• Relatively high unemployment</li> <li>• Pockets of deprivation and worklessness across the City</li> <li>• High levels of out commuting and few large employers</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Encouraging 'SMART' growth – upgrading and making more efficient use of existing space</li> <li>• High levels of entrepreneurial activity and self employment providing opportunities for sustainable future growth</li> <li>• Above average proportion of SMEs and micro businesses with significant growth potential</li> </ul>	<ul style="list-style-type: none"> <li>• Limited supply of land and premises (particularly affordable premises) for employment</li> <li>• Increasing pressure on employment land to be released for higher value uses (such as housing)</li> <li>• Access to affordable housing</li> <li>• Low representation in growth and knowledge based sectors</li> </ul>



### 3.0 Overview of Employment Space

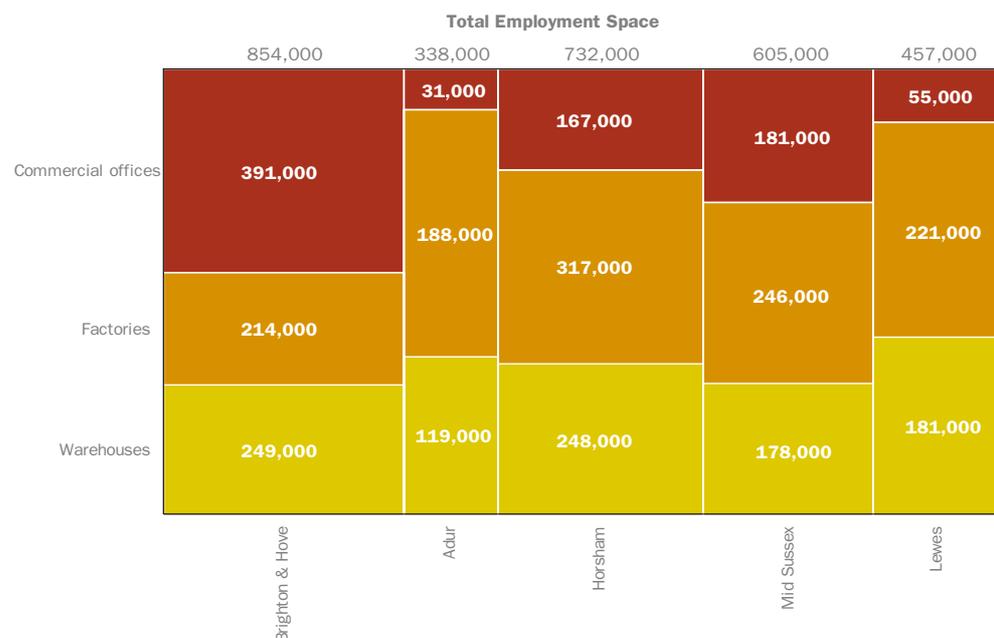
3.1 This section provides an overview of the current stock of employment space in Brighton & Hove, and recent trends and changes to the supply of this space. Both the amount of employment land and the quantity of built employment floorspace are considered across the main types of employment uses i.e. offices (use class B1(a/b)), warehousing/distribution (B8) and manufacturing industry (B1(c)/B2). This analysis is based on data from the following sources:

- commercial floorspace data from the ONS and Valuation Office Agency (VOA);
- Brighton & Hove City Council’s annual monitoring data on commercial space; and
- the EGi Property Link database and other commercial property sources.

### Current Stock of Employment Space

3.2 In 2008, Brighton & Hove contained some 854,000 m<sup>2</sup> of B class floorspace. A breakdown of this space by main uses, and a comparison with employment space levels in nearby districts, is shown in Figure 3.1. This indicates that the supply of employment space in Brighton & Hove is split fairly evenly between offices uses which account for just under half (46%) of total stock and industrial uses (54%). The stock of warehousing space is the largest of all five adjoining districts, while the stock of factory accommodation is smaller than Horsham, Mid Sussex and Lewes.

Figure 3.1 Employment floorspace by District (m<sup>2</sup>)

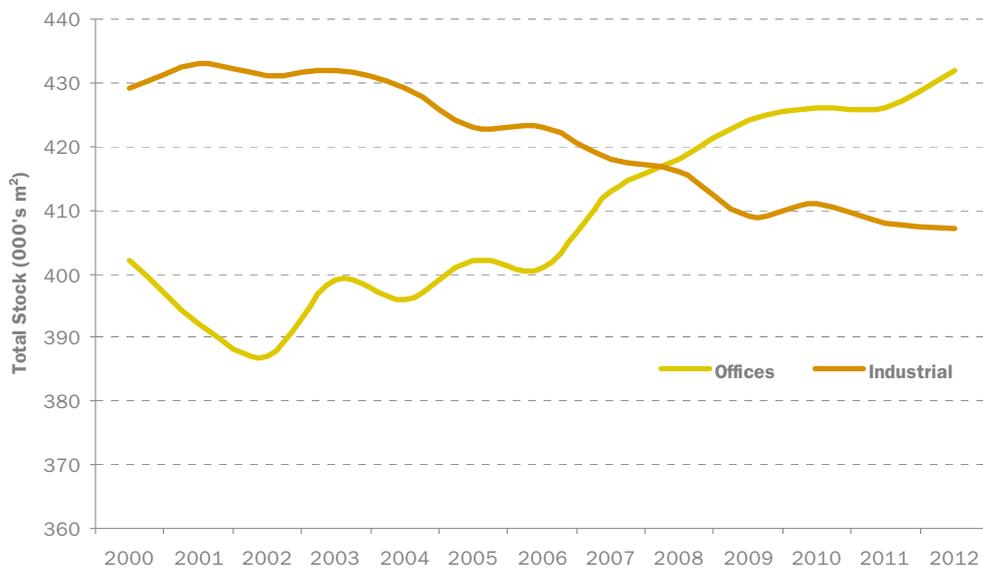


Source: VOA 2008

3.3

The City's office stock is predominantly concentrated in Central Brighton, whilst industrial and warehousing space is dispersed more widely across the City. Commercial office space in Brighton & Hove increased by nearly 8% over the period 2000- 2012 according to published VOA data (Figure 3.2), compared with 12% across the South East as a whole. Total industrial space fell by 5% over the same period, compared with a slight increase of 2% across the South East, possibly reflecting the significant decline in manufacturing employment by approximately 35% over the last decade in Brighton & Hove (compared with a decline of 30% across the wider South East).

Figure 3.2 Change in Business Floorspace in Brighton &amp; Hove, 2000-2012



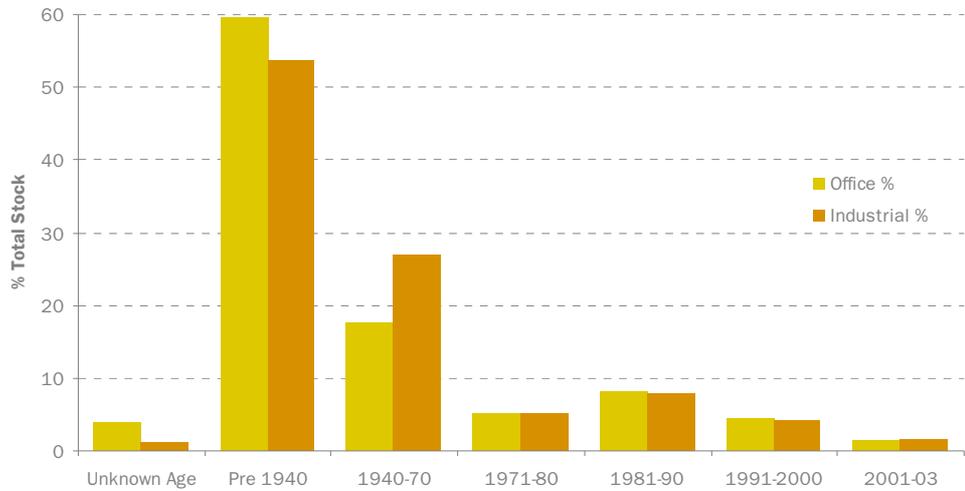
Source: VOA Business Floorspace Statistics / NLP analysis

## Age of Premises

3.4

Although only covering the period up to 2003, ONS data on the age of premises can give a broad indication of the age of stock in the City. This shows that Brighton & Hove's significant stock of office space is relatively old, with 77% of it built before 1970 compared with 57% in the South East region. In addition, the proportion of post 1990 office premises was only 6% in Brighton & Hove compared with almost 14% in the region. Whilst this suggests there is a lack of modern, purpose-built office premises in the City, it also reflects the heritage character and constraints associated with parts of Brighton & Hove (particularly Central Brighton) which accommodates around 3,500 listed buildings and 34 conservation areas.

Figure 3.3 Age of Premises in Brighton &amp; Hove



Source: ONS 2003

- 3.5 With regard to industrial stock, 80% of Brighton & Hove's stock was built before 1970, again a much higher proportion than the region (55%). Only 6% was built after 1990 compared with 10% in the region. Limited new development since 2000 suggests this position is unlikely to have improved. Overall, this indicates a fairly ageing and lack of modern business premises in the City relative to what is recorded in other parts of the region.

## Vacancy Levels

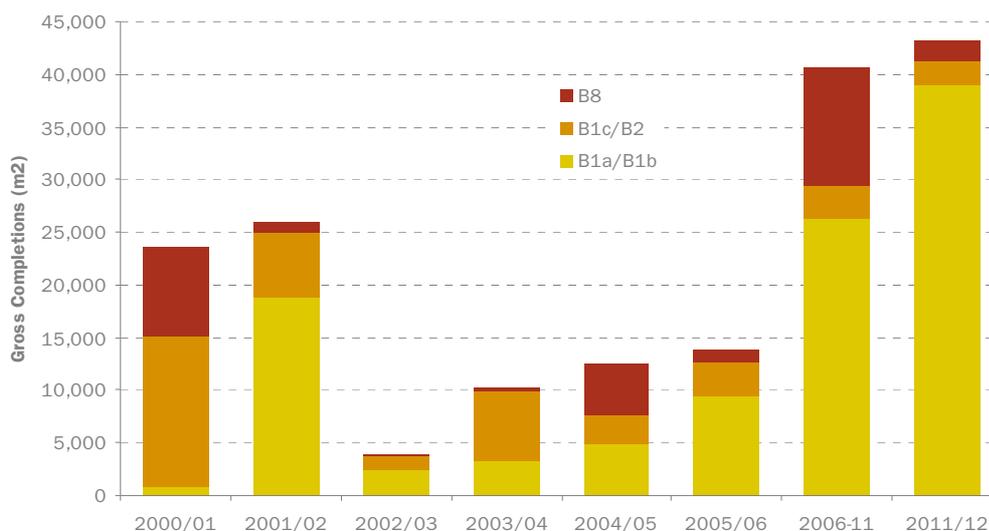
- 3.6 A historic view of vacancy levels in Brighton & Hove from Valuation Office Agency data indicates local vacancy of employment space was generally below regional and national rates up to 2004.
- 3.7 Latest commercial property market reports suggest that vacancy rates for both office and industrial premises in Brighton & Hove remains low at approximately 9% for offices and just 3% for industrial premises.<sup>12</sup> Vacancy levels for 'Grade A' office accommodation are even lower, at around 2%, reflecting very limited availability of this type of space across the City.
- 3.8 These vacancy figures appear to be lower than typical availability rates (around 10%) for a normal market with a reasonable amount of space available for firms to relocate and expand, suggesting an overall shortage of both office and industrial provision.

<sup>12</sup> Stiles Harold Williams Market Focus Q3 2012

## Development Rates

- 3.9 The gross amount of floorspace developed for employment uses in Brighton & Hove over the last 12 years is shown in Figure 3.4 below. Data for the five years 2006 to 2011 is only available as a five year block, but equates to average gross completions of 5,266 m<sup>2</sup> B1a/b, 614 m<sup>2</sup> B1c/B2 and 2,248 m<sup>2</sup> B8 per year.

Figure 3.4 Gross Development Rates 2000-12



Source: Brighton & Hove City Council

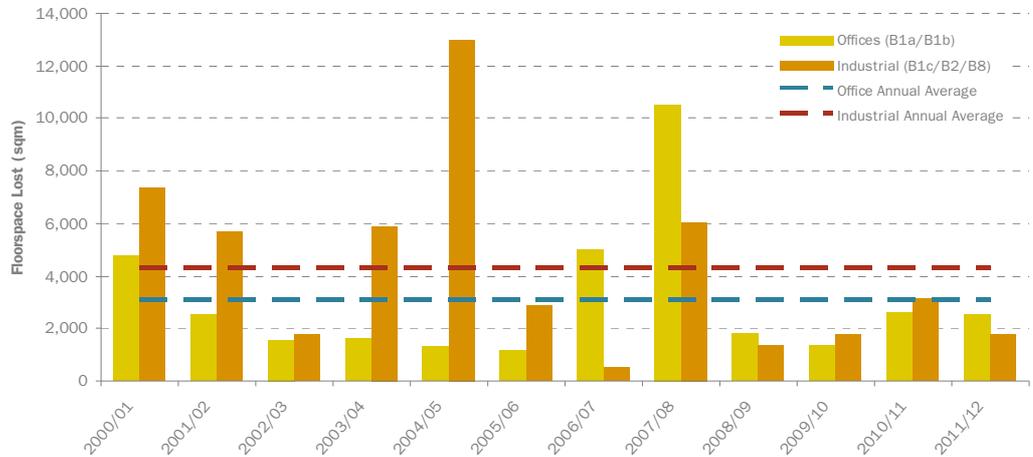
- 3.10 These figures indicate that a gross figure of just over 13,700 m<sup>2</sup> of B Class space was developed per annum across the City between 2000 and 2012. The majority of new floorspace developed (around 60%) was for B1a/b office uses, 23% for B1c and B2 factory/industrial uses and only 17% for B8 distribution uses.
- 3.11 The level of development peaked in the most recent reporting year (2011/12) with the City recording gross completions that were more than three times higher than the annual average over the last 12 years. It should be noted however that some 90% of the B1a office completions in that year related to Phase 1 of the American Express headquarters site, and therefore completions elsewhere in the City were very modest by comparison.
- 3.12 Across the period as a whole the net development rate was significantly lower, at just over 7,170 m<sup>2</sup> p.a., reflecting losses of B-class space through redevelopment to other uses as detailed below.

## Losses of Employment Space

- 3.13 Council monitoring data indicates that past losses of employment land to other uses have been significant and very variable by year and by B use class (Figure

3.5). In particular, 2004/5 and 2007/8 stand out as recording significant losses of industrial and office space respectively.

Figure 3.5 B Class Losses by year (2000-12)



Source: Brighton & Hove City Council

- 3.14 Brighton & Hove recorded an annual average loss of just over 7,320 m<sup>2</sup> for the period 2000-2012, with most of this involving losses from B1a/b office (42%) and B1c/B2 factory space (38%). The majority of these losses were to residential use, closely followed by retail (A1-A3) and D1 uses such as medical/health centres and language schools.

## Emerging Supply of Employment Space

- 3.15 The supply of employment space in the development pipeline comes from sites allocated for employment development in the Draft City Plan and from other sites with planning permission.
- 3.16 In order to accommodate the City's future development needs, the Draft City Plan identifies eight strategic Development Areas, seven of which will provide the focus for the majority of employment development across the City. The location of these Development Areas is presented in Figure 3.6 below.

Figure 3.6 City Development Areas



Source: Brighton & Hove Draft City Plan

3.17 Development Areas have been identified in terms of potential capacity and opportunities for change, having scope to deliver development of a citywide or regional importance and/or because they are sites in need of regeneration. In total these Development Areas have the potential to provide 109,300m<sup>2</sup> of new employment floorspace, broken down as follows.

Table 3.1 Development Area Capacity defined by Policy CP3

		New Employment Floorspace (m <sup>2</sup> )		
		Industrial (B1c/B2/B8)	Offices (B1a/b)	Total
DA2	Brighton Marina (Gas Works)	4,000	n/a	4,000
DA3	Lewes Road	n/a	15,600	15,600
DA4	New England Quarter and London Road	n/a	20,000	20,000
DA5	Eastern Road and Edward Street	n/a	33,200	33,200
DA6	Hove Station	n/a	4,000	4,000
DA7	Toads Hole Valley	n/a	25,000	25,000
DA8	Shoreham Harbour	7,500	n/a	7,500
<b>Total</b>		<b>11,500</b>	<b>97,800</b>	<b>109,300</b>

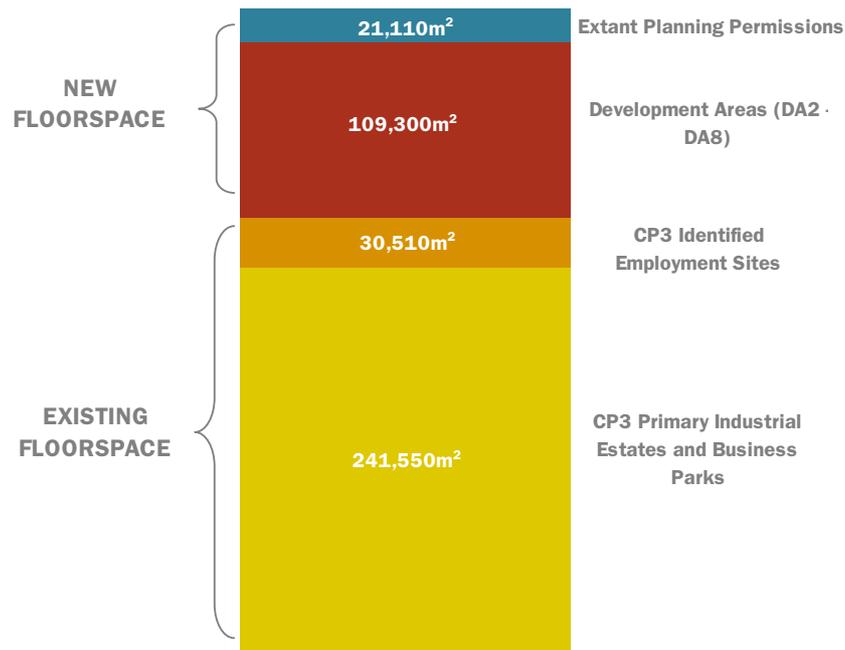
Source: Brighton & Hove City Council Draft City Plan (assumptions of split between industrial and office space made by NLP based on Policy CP3 supporting text)

Note: New employment floorspace capacity at Shoreham Harbour (7,500m<sup>2</sup>) is likely to comprise a mix of industrial and office uses

3.18

In addition, the Draft City Plan also identifies approximately 21,110m<sup>2</sup> of extant planning commitments for B1a office space, which comprises proposals for the Amex building, Sackville Trading Estate, Brighton Marina, Astoria and St Marys Hall (Eastern Road). If this development comes forward, this would increase the total available supply of employment across the City to 130,410m<sup>2</sup>. This is shown in Figure 3.7, along with other components of existing employment floorspace supply identified in Policy CP3 (Employment Land).

Figure 3.7 Existing and Emerging Supply of Employment Space



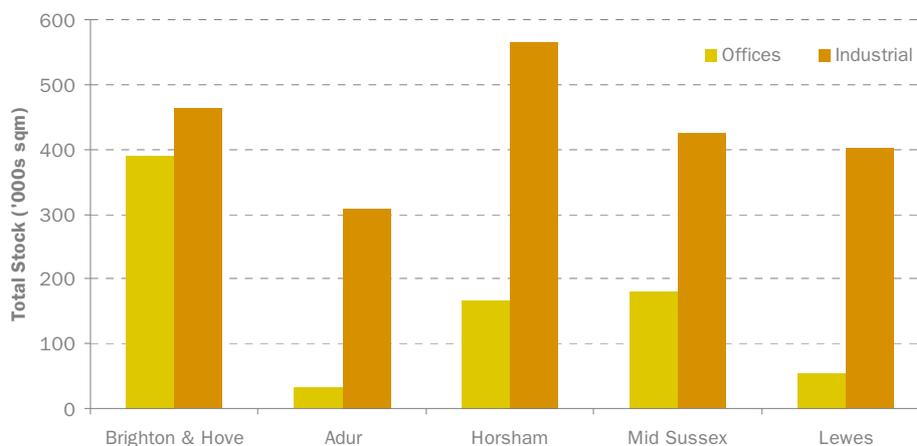
Source: Brighton & Hove City Council Draft City Plan Note: existing floorspace information based on 2006 survey of industrial estates

## Employment Space in Adjoining Areas

3.19

It is also important to understand the extent of available employment land in adjoining local authority areas and any major new economic developments coming forward there which might compete with the City for future demand. A brief review has therefore been undertaken below of the current position in each area. Figure 3.8 summarises the amounts of B Class employment floorspace in these districts relative to Brighton & Hove with further details for each adjoining authority presented in Appendix 3.

Figure 3.8 Employment Floorspace in Brighton &amp; Hove and Adjoining Districts



Source: VOA 2008

## Lewes

3.20 According to Lewes' emerging Core Strategy, the district's current supply of employment premises is ageing and does not meet modern business requirements. Employment land is also under pressure from higher-value competing land uses particularly residential and retail.

3.21 In order to address this, the District Council aims within the Core Strategy, to provide 50,000 sq.m to 64,000 sq.m of employment floorspace between the period of 2010 and 2026, with the focus on Newhaven and Lewes town. Major development is planned at Newhaven Port to accommodate a clean technology and renewable energy business cluster, building on the success of existing local businesses and the current opportunities in off shore wind. However, recent planning permissions for mixed-use developments have substantially reduced both the amount of potential employment land supply available in the town and the surplus of supply that has traditionally existed.

## Mid Sussex

3.22 The District's three main towns of Burgess Hill, East Grinstead and Haywards Heath accommodate the majority of Mid Sussex's employment land. Haywards Heath functions as a sizeable office centre, with the proposed Station Quarter redevelopment scheme expected to create approximately 10,000 m<sup>2</sup> of new office space to meet growing demand. The district's main industrial centre at Burgess Hill has successfully attracted industrial occupiers from Brighton in recent years and will be a focus for further growth in high-skilled manufacturing.

3.23 The District's ELR recommends the additional allocation of 1.7 ha of land for B1(a) office development at Haywards Heath, 5-8 ha of high quality land for industrial and warehouse development (B1(c), B2 and B8) at Burgess Hill to meet demand over the 2006-26 plan period. Since then, the draft replacement

District Plan proposes a major allocation of 20-30 ha at Burgess Hill to accommodate a high quality business park.

## Horsham

- 3.24 Employment space in the District is concentrated within the town of Horsham which serves as the main office centre. Vacancy rates for office space remain relatively high at around 12% with an oversupply of large floor plate office units. Whilst the Core Strategy is currently being replaced by the Horsham District Planning Framework, it identifies a target of 210,000 sq.m of employment floorspace to be delivered by the end of the plan period of 2018, with approximately 16,433 sq.m still required.
- 3.25 The ELR recommends the allocation of additional land to enhance provision of high quality modern business park floorspace in the north of the District to maintain and attract higher value added companies including pharmaceuticals and higher value-added manufacturing. This includes the allocation of land North of Horsham; an extension to Wiston Business Park; and employment land at Billingshurst largely for office uses.

## Adur

- 3.26 Adur has a number of well-established business areas, including Lancing Business Park, Dolphin Road, Shoreham Harbour and Shoreham Airport, but a scarcity of readily available land for new economic development. The emerging Local Plan is seeking to maximise the creation of further employment floorspace within the district and the ELR identifies three potential sites for employment growth at Shoreham Harbour, Shoreham Airport and New Monks Farm, creating up to 66,000 sq.m of employment land by 2028.
- 3.27 Masterplanning is underway at Shoreham Harbour to maximise its economic potential and revitalise the area for the benefit of local communities and the wider sub-region. The mixed-use development is expected to improve employment opportunities in the area by bringing forward a range of business premises for both industrial uses that have traditionally occupied the area as well as higher-value sectors.

## Conclusions

- 3.28 Brighton & Hove's employment space is evenly split between industrial and office provision, with office space representing just under half (46%) of all stock, factory space representing 25% and warehousing 29%. The City has the largest supply of employment space of all neighbouring authorities, particularly in terms of commercial office space reflecting the City's role as a sub-regional centre.
- 3.29 The City has seen moderate levels of new development over the past decade, the majority for B1a/office uses. At the same time, Brighton & Hove has been

losing B class space – largely industrial – placing increasing pressure on remaining space to accommodate the City’s economic activity.

3.30 Brighton & Hove now has a fairly ageing stock of employment space and a lack of modern business premises relative to other parts of the region. Overall vacancy of office space is at normal levels (although much lower for Grade A space) and industrial vacancy is very low.

3.31 Brighton & Hove’s unique geographical constraints coupled with greater availability of industrial or office space in adjoining areas are likely to make it more difficult for the City to compete for new investment and relocations, or accommodate enquiries for employment space as they arise. There are some large employment developments underway or proposed in adjoining authorities for example at Newhaven, Shoreham Harbour and Burgess Hill. To varying degrees these may compete with Brighton & Hove, but also may offer some potential for accommodating demand that cannot currently be met within the boundaries of the City subject to any cross-boundary arrangements considered under the Duty to Cooperate.

## 4.0 Brighton & Hove Commercial Property Market

4.1 This section describes current property market conditions in Brighton & Hove and its relationship with surrounding areas, including recent trends in the demand for and supply of office and industrial premises. These findings are based on discussions with a number of commercial property agents and various economic development and business organisations and firms active in the area (see Appendix 1).

### Overview

4.2 The UK commercial property market is still recovering from the financial crisis of 2007/8 and the ensuing recession and property slump. Falls in the capital value and rental levels of office and industrial premises of up to 40% combined with stricter lending criteria from banks and the abolition of tax relief on empty property mean that property development is less profitable, finance is hard to obtain and the risks of developing space without an end-user identified are high. As a result, speculative development has become very rare in virtually all of the UK outside of prime London markets. This is particularly the case in more economically marginal locations, and those without a significant existing commercial property market, where lenders and developers are likely to be especially cautious.

4.3 There are differing views on how the market will evolve in the coming years. For example, competing forces such as a scaling back of public sector space requirements but a fall in employment land prices may play out in different ways in different locations. In any case, this study looks over the long term of the plan period up to 2030 and the inherent qualities of the City as a commercial location must therefore be considered.

### Market Geography

4.4 Brighton & Hove accommodates a relatively self-contained commercial property market, which is largely service-based in character and particularly associated with small and medium sized businesses operating within niche sectors such as the 'technology media and telecoms' (TMT) industries. The City supports a higher than average proportion of small and micro firms, with the City's two universities also encouraging spin-offs/start ups particularly within the digital and creative media sector.

4.5 As noted earlier, the City's stock of employment space is evenly split between industrial and offices and concentrated on a relatively large number of small sites around Brighton & Hove. Despite high rents, the main attractions for firms are excellent transport links (from Brighton and Hove stations to London and Gatwick Airport), a unique and diverse urban character, quality of life factors and the presence of a skilled local workforce.

- 4.6 Partly reflecting its constrained location/topography and more limited access to strategic routes, the market is viewed as relatively localised. Many firms in the area are long-established, with locally-based owners and workforce. In general terms, there is currently limited relationship with other regional markets such as Lewes to the east, Burgess Hill to the north and Adur to the west. In recent years the City has seen very few firms re-locating to Brighton & Hove from elsewhere, with enquiries for commercial space generally received no further afield than from Burgess Hill or Haywards Heath.
- 4.7 Overall, Brighton & Hove's commercial property market has fared relatively well during the recession, particularly when compared with other commercial centres within the wider South East. This underlines the City's economic strength and resilience, but places further pressure on an already limited supply of employment space.

## Market Segments

### Offices

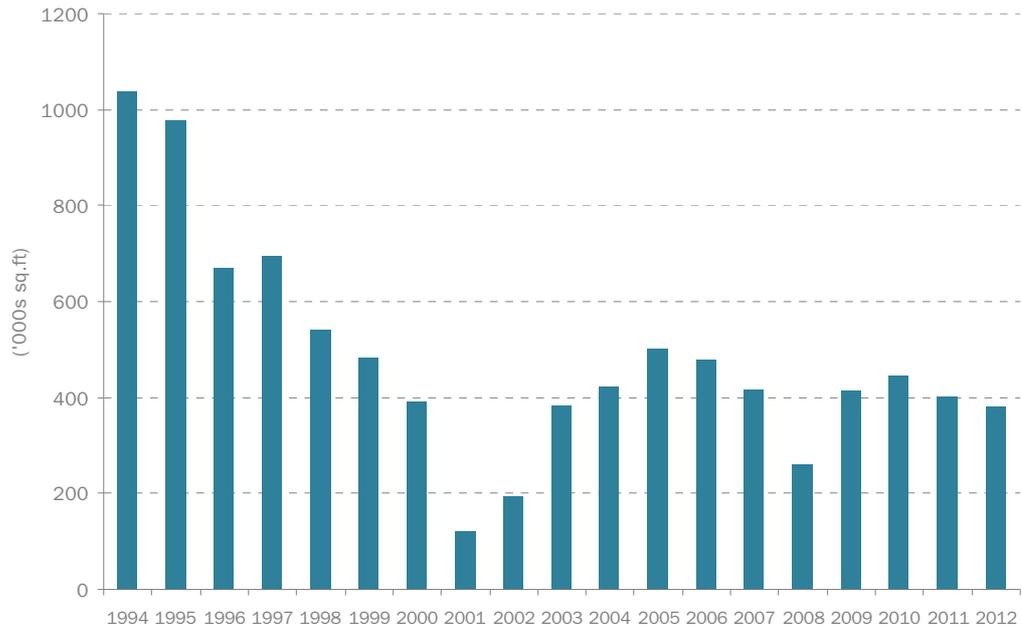
- 4.8 Demand levels for office premises in Brighton & Hove are generally strong, with the majority of demand coming from local firms wishing to expand or upgrade premises and stay within the area. Central Brighton represents the main focus for demand, particularly for premises in close proximity to the railway station and around the Queen's Road area which benefits from excellent transport links and a desirable location in the heart of the City. This is particularly the case for smaller creative businesses who value the attractions and amenities offered by a central Brighton location, as noted in recent research prepared on behalf of the City Council.<sup>13</sup>
- 4.9 Given the concentration of SME's within the City's business base (particularly within the high growth 'TMT' sectors) and demand arising from these firms, the main office requirements tend to be relatively small, typically up to 5,000 sq.ft (460m<sup>2</sup>) in size. Conversely, the City receives limited demand for larger floor plates, for example from larger corporate firms. This contrasts with the 1970-80s when Brighton & Hove (as with many other locations) experienced considerable demand from financial and insurance companies locating in the area. That trend gradually reversed during the 1990s as these types of firms consolidated and downsized. The City does still attract some office relocations or expansion from elsewhere but these tend to be smaller in scale and more closely linked to the City's existing sectoral strengths, for example Mediatonic, a computer games developer which took refurbished space at One Gloucester Place in 2012.
- 4.10 Much of the current office supply comprises older, second-hand town centre premises built between the 1960's and 1980's (some of which were originally

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<sup>13</sup> Brighton & Hove: Sustaining City Growth, Centre for Cities, 2009

designed for corporate occupiers) that have undergone recent refurbishment or upgrading, as well as some converted period buildings. Very limited new office space has been delivered in Brighton & Hove over the last 20 years or so, and as such the overall availability levels have declined significantly over recent years (Figure 4.1). Market reports point to less than 2% of the available stock of office space being classified as 'Grade A'.<sup>14</sup>

Figure 4.1 Office Availability in Brighton & Hove, 1994-2012



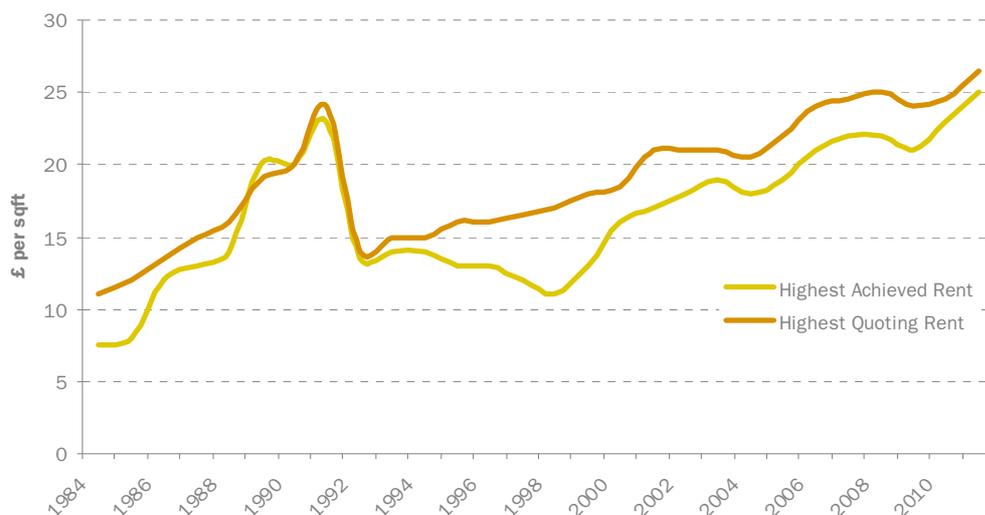
Source: Stiles Harold Williams

4.11

Consequently the overwhelming view amongst local agents is that the City has a significant shortage of higher quality office accommodation, particularly up to 5,000 sq.ft (460m<sup>2</sup>) in size. The market impact of this shortage of good quality space is that rental levels have gradually increased for this type of space (with the gap between quoted and achieved rents narrowing) to the extent that they are regarded as uncompetitive by many of the City's small and growing businesses (Figure 4.2). Sovereign House and One Gloucester Place represent some of the higher quality office space that the Brighton & Hove market currently offers; these are both refurbished 1980's office buildings and command some of the highest office rents in the City (Table 4.1). Vacancy levels have generally remained average over the past few years, at around 10%.

<sup>14</sup> Stiles Harold Williams Market Focus Q3 2012. 'Grade A' office space is generally defined a newly developed or recently refurbished space which offers a high specification and is located in prime office areas and/or other highly accessible locations.

Figure 4.2 Brighton &amp; Hove Office Rents, 1984-2011



Source: Stiles Harold Williams

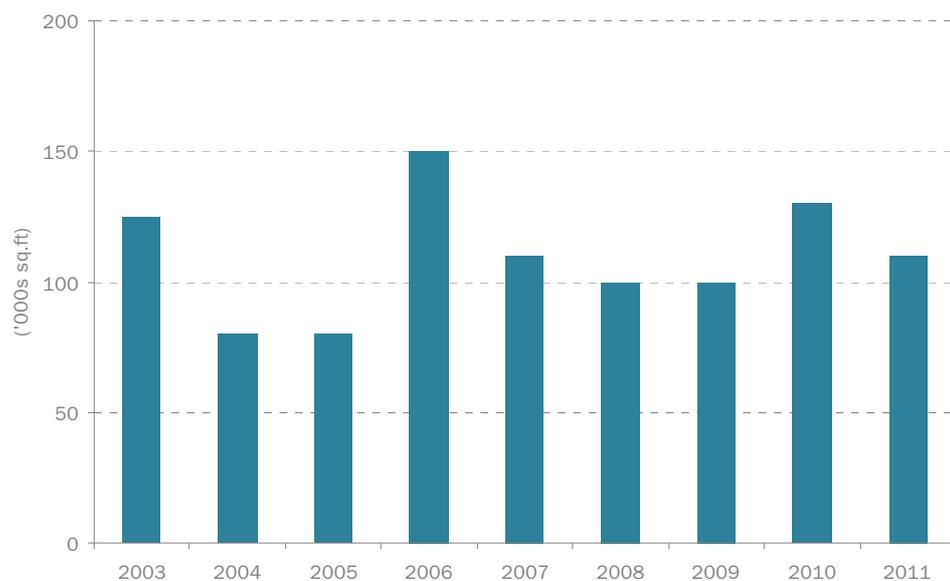
- 4.12 Whilst in quantitative terms the City has an adequate supply of office premises, qualitatively this supply fails to meet the demand for top quality, high specification accommodation within the Central Brighton area. Current market circumstances are restricting the development that the City needs, with development of new 'Grade A' office space reportedly unviable (despite the relatively high rents that such developments would command) and funding restrictions preventing any speculative development. In addition, many of the City's smaller TMT firms demand increasingly shorter leases (i.e. up to a maximum of 5 years) with this extra risk making the process of securing development finance even harder. Against this backdrop, there is an extremely limited availability of vacant sites within central Brighton to deliver new space.
- 4.13 In terms of future needs for office space, agents considered that Brighton & Hove could sustain significantly more activity than it currently has the capacity to accommodate, and that deficiency in existing space is potentially undermining future economic growth/competitiveness. However, location is key and with demand focused upon central Brighton, some City centre fringe locations such as Preston Road are attracting very little occupier/developer interest and are characterised by surplus space as a result. Agents felt that any approach to future development in these areas should be given careful consideration and highlighted the risk that focusing new development within these fringe locations could potentially dilute the strength of the central Brighton offer.
- 4.14 Recent office development completed at Woodingdean Business Park (to the north east of the City) represents a rare example of new office space being completed within the past five years or so. By providing small (up to 5,000 sq.ft/460m<sup>2</sup>) contemporary, high spec units, the office campus style development offers the right product for the Brighton & Hove market. However,

the relatively peripheral location and timing – coinciding with a period of severe recession and property market slump – means the development has struggled to attract occupiers. However, agents suggested that a similar type and quality of development in a more central location close to the City centre (or possibly the universities) would help to meet the City’s needs for high quality, flexible office space over the plan period.

## Industrial

- 4.15 Despite not being recognised as an important industrial location, demand for industrial space in Brighton & Hove remains strong and very low levels of vacancy reflect a limited supply of industrial accommodation (particularly modern, good quality space). The City’s high proportion of small and medium sized businesses and lack of historic larger manufacturing occupiers means that demand tends to be for smaller units from local firms that are looking to expand/upgrade, particularly within the City’s key growth sectors of digital and creative media and environmental technology.
- 4.16 Local agents report that the majority of enquiries for industrial space cannot be accommodated by current levels of stock and as a result potential occupiers are diverted to nearby centres such as Shoreham, Burgess Hill and Newhaven which have much larger and well defined industrial areas, with generally fewer land/topography constraints than Brighton & Hove. It is considered that limited supply of industrial space is currently constraining industrial activity in the City, with overall availability levels remaining relatively low over recent years (Figure 4.3). This lack of supply limits the potential for expansion and movement of existing firms as there is limited capacity, whilst it may also lead to potential economic opportunities being diverted from the City as firms cannot be accommodated within its boundaries.

Figure 4.3 Industrial Availability in Brighton & Hove, 2003-2011



Source: Stiles Harold Williams / NLP analysis

- 4.17 In terms of types of premises, agents perceived a shortage of flexible small to medium-sized industrial properties up to 5,000 sq. ft (460m<sup>2</sup>), offering a range of sizes to a range of users but predominately for B1c and B8 uses. As a result, rent levels for industrial space in Brighton & Hove are relatively high, particularly when compared with nearby Worthing and Eastbourne (Table 4.1).

Table 4.1 Industrial &amp; Office Rents in Brighton &amp; Hove and Comparator Cities

Location	Industrial	Offices
Brighton & Hove	£10 - £11.50 sqft	£10 sqft (older premises e.g. Preston Road) £20 sqft (refurbished) £23 sqft (top end - Sovereign House)
Worthing	£6.50 sqft	£7 - £16 sqft
Eastbourne	£7.50 sqft	£8 - £14 sqft
Croydon	£8 - £11 sqft	£20 sqft
City of London London West End	n/a	£57 sqft £86 - 97 sqft
Southampton	£6 - £7 sqft	£18 sqft
Reading	£8 - £10 sqft	£22 sqft

Source: Survey of Commercial Agents / VOA / NLP analysis

- 4.18 Most of the City's industrial estates are relatively old and small in size. They are distributed across the City, and sometimes located in unsuitable locations (for example within high density residential areas). Given that the City's industrial market is tight, the view from local agents is that at least one new industrial park/site is required in Brighton & Hove to provide a release valve and enable churn, intensification and upgrading of existing older sites. Any allocation of new industrial space should be located away from the City centre, near to key transport routes such as the A27 bypass, for example at Toad's Hole Valley, which would provide the opportunity to consolidate existing industrial activity onto more suitable sites.
- 4.19 Within the context of very limited development of new industrial space in the City over the last few years, recent development of small (up to 2,600 sq.ft/ 240m<sup>2</sup>) purpose built industrial units at Woodingdean Business Park has been relatively well received by the local market. However, despite it occupies a relatively peripheral location, with a lack of proximity to the City's key transport routes. Agents felt that a similar industrial product in a less remote location, with better connections and functional relationship with the City would better suit local demand.

### Provision for Small Firms/Start-ups

- 4.20 The City has a modest amount of space geared towards small, start-up businesses. For example, the Brighton Media Centre on Middle Street provides small office units for the creative sector on flexible leasing arrangements with a range of in-house training facilities. Regus serviced offices on Queen's Road offer Grade A accommodation and are reported to be nearly fully occupied.

Knoll Business Centre in Hove provides 34 small business units across a range of offices, studio space, workshop premises and storage facilities.

- 4.21 However, local agents felt that Brighton & Hove could easily accommodate additional start-up office space offering small (1,000 – 3,000 sq.ft/ 90 – 280m<sup>2</sup>) fully equipped units. They also pointed to a growing disconnect between aspirations amongst some TMT SMEs for good quality, accessible and affordable space and the level of rent that these firms can afford.

### Needs of Local Businesses

- 4.22 In order to gain a better understanding of the needs of businesses operating within the City and the main factors that support and inhibit business growth, Brighton & Hove City Council recently commissioned a Business Survey<sup>15</sup> with a sample of 200 firms across a range of sectors and locations in the City.
- 4.23 This is supplemented by feedback obtained as part of this study from discussions with a sample of firms based in Brighton & Hove on their future requirements for business space. This comprised a number of methods including telephone interviews and a business consultation workshop, with key responses drawn out below.
- 4.24 The majority of companies were satisfied with their current premises/site, which were generally cited as adequate to meet their current requirements. Firms based within Central Brighton (e.g. The Laines area) in particular rated location, size and cost of premises as very good, with many having operated from their current premises for a number of years. One firm operating from a refurbished office block cited the strange layout of the property – with cross over between a number of individual units – as causing tension with neighbours and not well suited to modern business needs. This feedback is supported by findings from the 2010 Brighton & Hove Business Survey which identified that accommodation stock was not generally seen to reflect modern business needs.
- 4.25 However, industrial firms were generally less satisfied with their current premises. A few firms felt that their business operations were being constrained by their current premises, which were too small, were being outgrown and often in an unsuitable location for industrial activity (for example being surrounded by housing).
- 4.26 About half of consulted firms are considering expanding their premises in the next 5-10 years to accommodate business growth, although in all cases this is anticipated to involve re-locating to a larger more suitable site, with existing sites too inflexible to accommodate any expansion. For the majority of firms, this would also involve re-locating outside of the Brighton & Hove City boundary

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<sup>15</sup> Brighton & Hove Business Survey 2010, Step Ahead Research Ltd on behalf of Brighton & Hove City Council, November 2010

(for example to Shoreham and Chichester), citing a very limited supply of available sites within the City.

4.27 The most common factors that businesses cited for keeping them in Brighton & Hove were:

- proximity to a highly skilled, local workforce;
- firms had built up a brand/business base in the City;
- good access and transport infrastructure;
- reputation/association of the City, particularly for digital/creative media firms, strengthened by industry leading events (such as the Digital Festival) and availability of freelance workers.

4.28 The 2010 Business Survey also highlighted a strong commitment amongst businesses to remain within Brighton & Hove where possible, citing the skilled resident population, cultural and linguistic diversity, communication skills and good links to both London and Gatwick Airport. The lifestyle that the City offers, its international renown and the fact that it is a place that people enjoy visiting were also noted as key benefits of being located in the City.

4.29 The 2010 Survey concluded that an outstanding drawback for the City was considered to be its stock of business accommodation and lack of dedicated space for important elements of its economy. This will make it difficult for the City to achieve identifiable critical mass and pose a challenge to both attracting and retaining growth-orientated businesses (such as digital media firms who are more likely to be looking for new business accommodation).

## Conclusions

4.30 Brighton & Hove's commercial property market is largely self-contained and localised, driven by SME's such as digital and creative media firms looking to expand and/or upgrade. Enquiries for employment space are generally not received beyond Burgess Hill or Haywards Heath.

4.31 Demand for office space remains strong, particularly for Central Brighton and the area surrounding the station/Queen's Road and for small units up to 5,000 sq.ft (460m<sup>2</sup>). However, very little new office development in the past 20 years has resulted in a shortage of 'Grade A' office space in the City, with the majority of current stock comprising refurbished older buildings. Coupled with funding/viability issues in the current market, this lack of supply could constrain the level of future office based activity that the City has the potential to sustain.

4.32 Although not perceived as an important industrial location, demand for industrial space in the City also remains high, again with demand largely driven by local SMEs. However, existing provision of industrial space is limited, often in unsuitable locations, with very little new development completed in the last 10 years. Market feedback indicates that the City requires more modern,

flexible and small scale industrial space to accommodate enquiries that currently cannot be met.

- 4.33 Whilst the City has a good level of provision for small, start-up businesses, there is scope to expand this type of accommodation given the concentration of and demand from micro digital and creative media firms in Brighton & Hove.
- 4.34 Business feedback indicates that a number of the City's firms (particularly those with an industrial focus) are being constrained by inadequate premises and in absence of a readily available supply of sites in the City, some firms are re-locating outside of Brighton & Hove to accommodate their growth aspirations. An underlying shortage of good quality business accommodation could potentially threaten Brighton & Hove's longer term ability to attract and retain the business base needed to achieve continued economic growth.



## 5.0 Review of Employment Sites Portfolio

- 5.1 This section assesses the characteristics and quality of existing and allocated employment sites in Brighton & Hove and their suitability to meet future employment development needs.
- 5.2 A total of 50 existing, allocated and a sample of other non-allocated employment sites were assessed amounting to about 155 ha in total area. These sites comprise the main employment areas and allocations, as identified by Brighton & Hove City Council, as well as a sample of other sites but do not include every employment site within the City.
- 5.3 Each site was inspected and its suitability for employment use assessed against the criteria listed below, which reflect those in the ODPM Guidance on Employment Land Reviews:
- a strategic road access and local road access;
  - b accessibility to public transport and services;
  - c adjoining uses that might constrain employment uses;
  - d site size, characteristics and potential development constraints; and
  - e attractiveness to the market, including vacancy and market activity.
- 5.4 Other factors were also noted including the site's suitability for specific uses, any barriers to the delivery of undeveloped sites for employment uses, as well as sustainability and sequential preference factors where relevant. Details of each assessed site, and how they rate against the assessment criteria, are contained in Appendix 4.
- 5.5 It should be noted, however, that this assessment process in itself does not necessarily provide a complete picture of a site's role within the local economy. For example, a site's importance to meeting particular business or sector needs can be important reasons for retaining a site even if it does not perform well against conventional site assessment criteria. A broader commentary is therefore provided on each site to supplement the formal scoring exercise.

### Overview of Sites

- 5.6 The broad distribution across the City of employment sites assessed by this study is illustrated by Plan 5.1. About 11% of the sites assessed fell within the Central Brighton area as identified in the Draft City Plan (Policy SA2) whilst 28% are broadly identified as edge-of-centre. The remaining 50% of sites were situated in other locations across the City.
- 5.7 The sites are divided into four typologies taking account of the policy designations set out in the Draft City Plan:
- 1 Safeguarded primary industrial estates and business parks;
  - 2 Employment-led mixed-use development sites;

- 3 Development Area Strategic Allocations; and
- 4 A sample of non-allocated sites.

5.8 An overview of these sites is set out in Table 5.1, followed by a summary description and assessment of each site.

Table 5.1 Employment Sites by Type

Type of site	Number of sites	Total site area *	% of total site area
Safeguarded sites	13	42.51	28
Employment-led mixed use redevelopment sites	5	6.34	3
Development Area Strategic Allocations	21	97.24	63
Sample of non-allocated sites	11 grouped sites (20 individual sites)	8.95	6
<b>Total</b>	<b>50</b>	<b>155.04</b>	<b>100</b>

Source: NLP analysis

Note: sites areas measured by NLP from BHCC GIS site boundaries

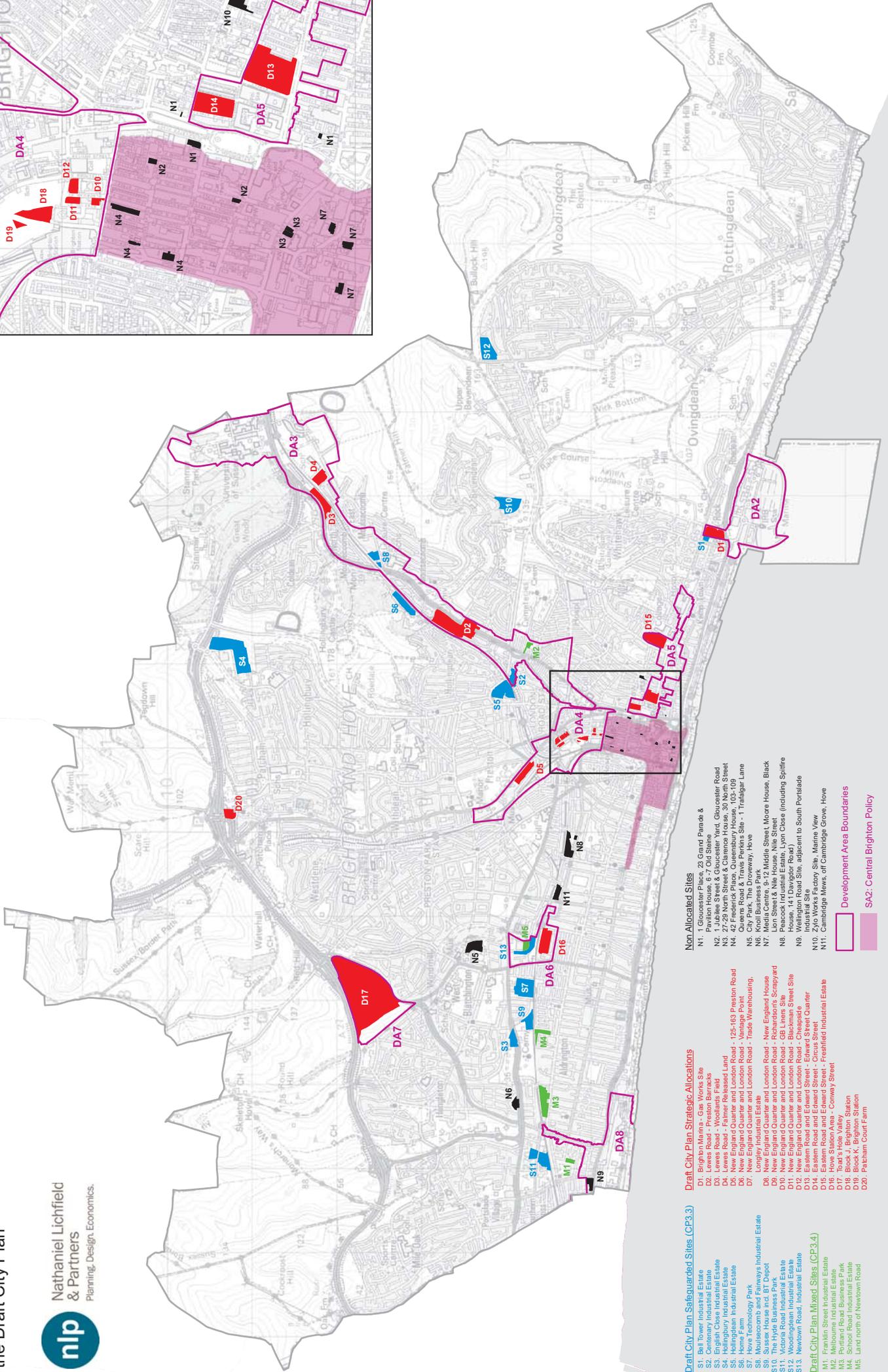
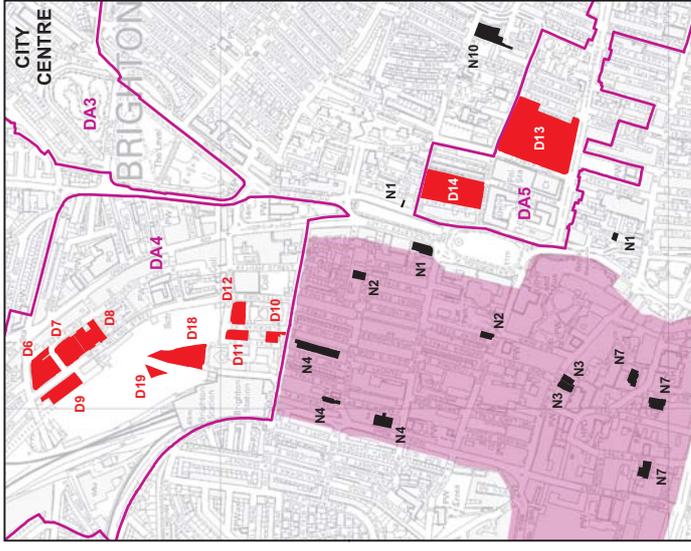
## Safeguarded Sites

5.9 Policy CP3 of the Draft City Plan provides protection for the following primary industrial estates and business parks for B1, B2 and B8 uses. The focus of the assessment for these sites is whether these sites are performing sufficiently well to justify being safeguarded and the extent to which these sites can be upgraded and renewed in the future.

5.10 **Bell Tower Industrial Estate** [S1] is located directly along the A259 running along the seafront, on the edge of Kemp Town. This is a small (0.37 ha), self-contained employment site offering reasonable quality, single storey units for light industrial workshops (e.g. motorbike repair workshop). The site is self-contained and therefore generally compatible with adjoining uses, with a residential area to the south and the Gas Works site [site D1] to the east. It is a good local employment site that appears to be well used with no vacant units available. The site may have limited potential to be intensified but this would require full scale redevelopment. Overall, this is an average to good quality employment site serving small local businesses.

5.11 **Centenary Industrial Estate** [S2] is a small site (1.13 ha) which is fully occupied with B1c and sui generis uses such as building merchants. Whilst a small residential area adjoins the site to the south and west, the site is self-contained, particularly given the variation in topography between the site and its surroundings. Whilst the site is located along small residential roads, the site lies just 1km from the A23. The site has dedicated access point and a good internal layout exists which provides adequate parking facilities. There is limited

# Plan 5.1 Overview of Employment Sites and Policy Designations as identified in the Draft City Plan



- Draft City Plan Safeguarded Sites (CP3.3)**
- S1. Ball Tower Industrial Estate
  - S2. Centenary Industrial Estate
  - S3. English Close Industrial Estate
  - S4. Haining Industrial Estate
  - S5. Haining Industrial Estate
  - S6. Home Farm
  - S7. Hove Technology Park
  - S8. Moulsecomb and Fairways Industrial Estate
  - S9. The Herd Business Park
  - S10. The Herd Business Park
  - S11. Victoria Road Industrial Estate
  - S12. Woodingdean Industrial Estate
  - S13. Newtown Road Industrial Estate
- Draft City Plan Mixed Sites (CP3.4)**
- M1. Franklin Street Industrial Estate
  - M2. Malbourne Industrial Estate
  - M3. Portland Road Business Park
  - M4. School Road Industrial Estate
  - M5. Land north of Newcom Road
- Draft City Plan Strategic Allocations**
- D1. Brighton Marina - Gas Works Site
  - D2. Lewes Road - Preston Barracks
  - D3. English Close Industrial Estate
  - D4. Lewes Road - Palmer Released Land
  - D5. New England Quarter and London Road - Venage Point
  - D6. New England Quarter and London Road - Trade Warehousing, Longley Industrial Estate
  - D7. New England Quarter and London Road - New England House
  - D8. New England Quarter and London Road - Richardson's Scaperyard
  - D9. New England Quarter and London Road - GB Liners Site
  - D10. New England Quarter and London Road - Backman Street Site
  - D11. New England Quarter and London Road - Cheapside
  - D12. New England Quarter and London Road - Eastward Street - Freshfield Industrial Estate
  - D13. New England Quarter and London Road - Eastward Street - Freshfield Industrial Estate
  - D14. Eastman Road and Edward Street - Circus Street
  - D15. Eastman Road and Edward Street - Circus Street
  - D16. Hove Station Area - Conway Street
  - D17. Block's Triangle Station
  - D18. Block K, Brighton Station
  - D19. Block K, Brighton Station
  - D20. Patcham Court Farm
- Non Allocated Sites**
- N1. Gloucester Place, 23 Grand Parade & Pavilion House, 6-7 Old Steine
  - N2. 1 Jubilee Street & Gloucester Yard, Gloucester Road
  - N3. 42 North Street & Clarence House, 30 Old Steine
  - N4. 42 North Street & Clarence House, 30 Old Steine
  - N5. City Park, The Drove Way, Hove
  - N6. Kroll Business Park
  - N7. New England Quarter and London Road - New England House, Black Lion Street & Nile House, Nile Street
  - N8. Peacock Industrial Estate, Lyon Close (including Spire House, 141 Davigdor Road)
  - N9. Wellington Road Site, adjacent to South Portlande
  - N10. Zygo Works Factory Site - Marina View
  - N11. Cambridge Mews, off Cambridge Grove, Hove
- Development Area Boundaries**
- DA1 - DA20
- Policy**
- SA1: Central Brighton Policy
  - SA2: Central Brighton Policy

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scope for development or intensification but the current site appears to be functioning well.

- 5.12 **English Close Industrial Estate** [S3] is located directly along the A270 dual carriageway providing good, unconstrained access. The site is a high profile site offering a mix of units with some sections internally managed and consisting of more modern units. Some units are in need of repair however no vacancies exist on site demonstrating a good local employment offer. The internal layout varies with some quality parking facilities available whilst other units offer limited parking. No land is available for development and there is limited space to intensify. The site performs well against the assessment criteria, but there is particularly an opportunity for parts of this site to be upgraded or refurbished to meet modern standards.
- 5.13 **Hollingbury Industrial Estate** [S4] is one of the City's largest employment sites located directly adjacent to the A27 providing direct access onto the site. The local access is relatively congested, and is shared with an Asda foodstore. Some on-street parking is evident although the majority of units have dedicated parking facilities. This is a high profile site offering a large range of employment uses with reasonable quality buildings. There is limited scope to intensify the site within the current boundary, and it is possible that some highways issues would need resolving if additional development occurred on site. Overall, this is a good quality employment site. In future, the site may offer potential to accommodate some strategic relocations, for example the proposed relocation of Newsquest to the City Centre which could in turn provide a new site for the Hove Bus Depot to relocate.
- 5.14 **Hollingdean Industrial Estate** [S5] is within reasonable proximity to the A270 providing good strategic access into the site. The site has its own dedicated access and provides a good internal road layout. The site has two occupiers and the council waste depot services. A large part of the site comprises a new waste management facility whilst the adjacent unit is the former meat market which comprises older premises. The northern part of the site consists of the Council recycling depot. Overall, this site performs reasonably although redevelopment of the market building or Council depot may be a future option to intensify and upgrade the employment use.
- 5.15 **Home Farm Industrial Area** [S6] is located less than 2km from the A27 along the A270 dual carriageway providing excellent access. The site itself has its own dedicated access road leading only to the site. The site is self-contained and bounded by open countryside and the South Downs National Park. Development potential is limited due to the surrounding countryside however the site consists of large, modern units that are fully occupied. Overall, this is a good quality employment site.
- 5.16 **Hove Technology Park** [S7] is located to the west of Brighton centre. This 4.6 ha site is relatively high-profile located along the A270. The site is located at a junction and has its own dedicated access, shared with Homebase and Currys. The units are all of reasonable to good quality with very low vacancy apparent. The site is occupied with B1a and B1c uses and also a builder's merchants.

Despite the surrounding residential area, the site is self-contained and compatible with the surrounding area. Overall, this is a good quality employment site.

- 5.17 **Moulsecoomb & Fairways Industrial Estate** [S8] is located out-of-centre approximately 1.5km from the A27 along the A270 providing excellent site access. The site is split into two sections with a church occupying the site in-between. Both sites have varying characteristics with the eastern side offering high quality, modern units whilst the western site, occupied by Kingspan Waste, comprises a single, older unit. Both sites are however commensurate to their current uses and this is demonstrated with only limited vacancy. Whilst some potential for redevelopment exists on the eastern part of the site, overall, this performs as a reasonable employment site.
- 5.18 **Sussex House (including BT depot)** [S9] is situated to the north west of the City centre along the A270 providing good strategic access. The 1.9 ha site comprises a mix of modern and older buildings that remain suitable for employment use. The site has its own dedicated access that is shared with PC World whilst BT currently occupies the largest section of the southern part of the site. Whilst the site is relatively low profile being set back from the main road, the site remains fully occupied and there is limited scope for development. Any additional future development on the site may require upgraded access. Overall, this site generally performs well against the site assessment criteria.
- 5.19 **Hyde Business Park** [S10] is located to the north west of the City centre in an isolated out-of-centre location at Bevendean. The existing uses comprise a mix B1-B8 uses. The site is located in a residential area, some distance from the main road network and accessible only via residential roads. This constrains the suitability of the location for access by larger vehicles. The majority of the units are of poorer quality on a site that also offers limited parking facilities. However, the site has only one vacant unit and appeared to be well occupied; one unit is occupied by a children's soft play centre. The site has no vacant plots available, but could offer potential for intensification. Overall, this is one of the poorer performing sites against the assessment criteria, however it appears to be providing for employment needs at some level.
- 5.20 **Victoria Road Industrial Estate** [S11] is located to the western edge of Brighton boundary and consists of B1c, B8 and sui generis uses. This 2.17 hectare site is located less than 2km from the A27 which is connected by the A293 which is located approximately 0.3km from the site. The site is bisected by Victoria Road with land to the north dominated by car showrooms and land to the south also containing one car showroom. The remaining units are of reasonable quality being used for small-scale B8 and trade counter uses. The land to the south does not currently maximise the potential of the site with one vacant plot available for development depending on ownership issues. Whilst intensification of the site is possible, full-scale redevelopment of the southern part of the site would allow for a more efficient layout and potentially increase the amount of floorspace accommodated.

- 5.21 **Woodingdean Business Park** [S12] is a 3.9 hectare site located in Woodingdean to the north east of Brighton, generally isolated from other employment areas. The site comprises a new development on a former bakery site providing a mix of B1a, B2 and B8 uses, with one remaining vacant plot (0.37ha). The latter is currently subject to a planning application for a B8 warehouse with ancillary offices which is yet to be determined by the City Council. Access is reasonable given the relatively rural location although the road junction is congested at peak times. The site is relatively high profile because of its road frontage and has been built to a high standard by a single developer. There is currently a relatively high proportion of vacant units, but this probably reflects the recent completion of the development. Overall, this site scores well against the site assessment criteria, and represents one of the few examples in the City of a recently redeveloped employment site.
- 5.22 **Newtown Road Industrial Estate** [S13] is a 2.4 hectare site located to the west of the Hove town centre, along the southern edge of Newton Road. The site is currently occupied by mainly B2, B8 and sui generis uses. The site is within close proximity to residential areas however the site is surrounded by large retail units making it more compatible to its surroundings. The units are all of reasonably good quality and only some vacancies exist. The units seem to be fit for purpose although on-street parking exists along Newtown Road which may become congested during peak hours. The site layout could be improved but this is unlikely to be achieved without full redevelopment, and is ultimately constrained by the shape of the site. Overall, this is a good quality employment site against the assessment criteria.

## Employment-led Redevelopment Sites

- 5.23 Policy CP3 of the Draft City Plan identifies the following sites as presenting opportunities for employment-led (residential and employment) mixed use development in order to secure good quality, modern flexible employment floorspace. The focus of the assessment of these sites is therefore how well the sites currently perform and what opportunities exist for this role to be enhanced if the site is redeveloped.
- 5.24 **Franklin Road Industrial Estate** [M1] is a 0.53 hectare site located out-of-centre to the west of Hove. The site is located less than 2.5km from the A27 connected by the A293 and smaller local roads. The site is currently occupied by B1a, B1c and B8 uses, and is understood to be in split ownership; there is extant planning permission for a replacement warehouse unit. The site is surrounded by a built-up residential area resulting in the employment site being relatively incompatible within this location given the constrained residential roads and difficult access. Whilst the site is in a low profile location, the buildings are in reasonable condition and the site is currently occupied. The site has no potential for intensification or expansion in its current form, so redevelopment is the only option. The location scores less well against the site assessment criteria reflecting its constrained residential location, so is only likely to be suitable for very small scale employment uses. However, there may be viability issues given the location of the site away from any established

employment locations which it may be possible to overcome through cross-subsidy with some residential development on the site.

- 5.25 **Melbourne Street** [M2] is a 0.55 hectare site containing B1c and B2 employment space. The site comprises a collection of poorer quality workshops and the Enterprise Point small business unit building. The site appears to be providing an important source of affordable business units and workshop accommodation, although the operators of Enterprise House report vacant units and there has been some change of use of upper floors into leisure use now also vacant. Whilst the strategic access to the site is relatively good along unconstrained roads, the local access is poor with constrained junctions onto and off the site along with a narrow and congested internal layout shared with new residential properties. Whilst the site sits alongside a residential area (including a school), it remains relatively compatible with its surroundings in the context of the current uses which do not affect local amenity. However, the recently completed residential units immediately opposite the site may lead to increased amenity issues in the future. The site has limited potential for expansion and is already reasonably intensely developed. A comprehensive redevelopment of the site would allow a more efficient layout and access, and potentially to better manage the site's relationship with adjoining residential properties. However, it will be important to ensure that future redevelopment can provide substitute affordable workspace.
- 5.26 **Portland Road Trading Estate (including EDF and Martello House)** [M3] is a 3.25 hectare site located out-of-centre. The site has good access onto both parts of the site to the east and west. The site is almost fully occupied with EDF Energy occupying the main office building and larger part of the site. The site also includes a terrace of small industrial units (some in sui generis use) and Martello House, which was previously occupied by HMRC but has recently been refurbished and is currently being marketed as small office suites. No obvious constraints exist, and overall, this site does appear to offer potential for redevelopment to allow a more efficient layout of the site and to potentially rationalise some of the older buildings that currently exist. This will however depend on the operational requirements of existing occupiers, particularly EDF who currently occupy the major portion of the site.
- 5.27 **School Road** [M4] is a 1.21 hectare site that contains a mix of uses including B1a and B1c uses. The site is located out-of-centre and approximately 3km from the A27. The local access is constrained via residential roads, sharing the access with a school. There is a considerable amount of on-street parking along the roads, restricting vehicular movements. The site comprises a number of older industrial buildings which appear under-utilised and with a number of non B-class uses (e.g. hand car wash, children's play space), and a 1970s office building that appears in reasonable condition and is occupied by some smaller businesses. The site is surrounded by residential properties, and bounded by the railway line to the north. Overall, this employment site is underperforming and its allocation for mixed-use redevelopment is justifiable although it is less clear that a strong B-class employment function can be maintained in this

location, however it may offer potential for small scale, flexible provision serving local needs.

- 5.28 **Land North of Newtown Road** [M4] is located directly north of Newtown Road Industrial Estate. This site has good strategic access whilst the local access is reasonable but a little constrained given the on-street parking and the narrow Goldstone Lane which also serves a row of houses. The western corner of the site is occupied by a Peugeot car showroom, whilst the eastern side consists of vacant dilapidated industrial buildings. A retail park immediately adjoins the site to the north, whilst the main (and better performing) part of the industrial estate is located on the opposite side of Newtown Road to the south [site S13]. Overall, this site is currently underperforming and effectively provides no B-class employment space. Full-scale redevelopment is probably the only option to rationalise the current layout. This could form an extension of the existing industrial estate which performs reasonably well, although may be constrained by its proximity to other uses including retail and residential. If other uses were to be introduced as part of future redevelopment of the site, it will be important to ensure that these do not constrain the operation of the existing industrial uses on the southern side of Newtown Road.

## Development Area Strategic Allocations

- 5.29 Policy CP3 of the Draft City Plan identifies the following sites as Strategic Allocations for B1 employment floorspace. The focus of the assessment of these sites is therefore to assess the potential of these allocations to accommodate the identified employment uses.
- 5.30 The **Gas Works Site** [D1] is located out-of-centre to the east, along the A259 providing good access. The site is accessible from both Arundel Street and Marine Way offering a reasonable quality road junction although the road is relatively narrow, congested and very poorly surfaced. The site is in a high profile location and is currently under-utilised, occupied by a car servicing garage and a storage facility for BT. The remainder of the site comprises operational gas holders and a large vacant plot to the south. The site requires full-scale redevelopment and is likely to incur high remediation costs associated with the decommissioning and removal of the gas holders. The Draft City Plan currently provides for 4,000 sq.m of employment space (probably B1c) alongside residential and ancillary retail. Although located close to the existing Bell Tower Industrial Estate [site S1], it is not clear that this is a particularly strong location for new industrial development and the site sits within what is broadly a residential setting. To provide some context, the 4,000 sq.m allocation would be equivalent to nearly 2.5 times the floorspace on the existing Bell Tower estate. However, any new industrial floorspace brought forward could effectively form an extension to the Bell Tower estate comprising smaller scale units to the north of the site alongside potential improvements to the local road access/junction arrangements.
- 5.31 **Preston Barracks and Brighton University (Mithras House and Watts/Cockcroft Site)** [D2] is a large (8.88 hectare) site located along the

A270 providing excellent access. This large site is currently split into a number of component areas; Mithras House site lies on the opposite side of the A270 with poor pedestrian linkages to other parts of the site whilst the other part of the site consists of a large University building with the former MOD Preston Barracks, a large vacant brownfield plot to the south. The site contains some steep sections and therefore the topography of the site would constrain future redevelopment. The site is in an excellent location and could be a very attractive employment site as part of the City's 'academic corridor'. Since 2009, the Council has been working in partnership with the University of Brighton to explore wider development opportunities that include the former barracks site alongside adjacent university land. This effectively doubles the area of developable land, which offers the prospect of a more integrated and comprehensive development. Having agreed a 'Shared Vision' that sets out joint aspirations for the redevelopment in 2009, a Site Capacity Assessment that examined development potential was completed in 2010. Overall, the site offers significant potential as identified by the mixed-use development allocation set out in the Draft City Plan.

- 5.32 **Woollards Field South** [D3] is a high-profile greenfield site located directly on the A27. The adjacent plot (Woollards Field North) is currently being developed for a County archive centre, but no other obvious constraints exist. Future development of the site is likely to depend on achieving shared access onto the main road network as the alternative access would be via relatively constrained residential roads. The Draft City Plan indicates potential for 5,000 sq.m B1a office space, and this location would effectively function as a small out-of-centre business park. This would be well located close to the universities, although is not currently an office location and the site may not offer sufficient critical mass for a stand-alone office development (e.g. as is proposed at Toads Hole Valley). Previous planning permissions have existed for B1a development on the site, but these have not been implemented. An application has recently been submitted by the South East Coast Ambulance Service for the development of a 'Make Ready Centre' (including some ancillary office space) on this site which is yet to be determined by the Council.
- 5.33 **Falmer Released Land** [D4] currently consists of a new-car park space (1.91 hectares) servicing the American Express Community Stadium and Brighton Aldridge Community Academy. The Academy is located to the north east of the site and the remaining former school buildings have been demolished. Whilst the A27 is located within close proximity to this site, the local access is very poor along constrained residential roads. The site is self-contained and somewhat isolated from any local services although a bus-stop is within 200 metres of the site, and Falmer railway station is located nearby. The Draft City Plan identifies that this location may have potential to provide office space as part of a mixed-use development. However, the site is relatively isolated from other employment areas and has a low market profile (particularly if the office allocation at Woollards Field South does not come forward), as well as restricted local road access. These factors may limit the appeal of the site for office occupiers unless there is a clear rationale for occupiers to be located close to the Academy.

- 5.34 **125-163 Preston Road** [D5] is a 2.0 ha site currently offering mixed-employment across a range of buildings with one large vacant plot on site and an undeveloped site alongside. The current uses consist of B1a office use occupied within average quality out-dated buildings in need of significant refurbishment in some cases. The access arrangements are good with each plot containing its own dedicated access and parking facilities. This high-profile site is however under-utilised, with high levels of vacancy and agents are reported to be offering significantly discounted rents in order to attract tenants. The Draft City Plan provides for replacement office space (c.14,500 sq.m) alongside residential units, although it is less clear that demand in this location will sustain significant amounts of net additional office floorspace unless supply constraints continue in Central Brighton.
- 5.35 **Vantage Point** [D6] is a 0.36 hectare site containing a vacant nine-storey office building (with offices arranged over seven floors) located in a high-profile location on the corner of a junction directly onto the A270. This site is located on the edge of the City centre within walking distance providing excellent access to local services. The site is self-contained but the surrounding area has seen significant regeneration over the past few years and so this site now benefits from access to these new uses. The Draft City Plan allocates the site for 1,000 sq.m net additional B1 floorspace. Overall this site has good potential for employment redevelopment and provides a good short to medium term opportunity subject to the site being brought forward for development. However, site capacity constraints could mean that it is difficult to achieve a net gain employment alongside residential uses.
- 5.36 **Trade Warehousing, Longley Industrial Estate** [D7] is a 0.28 hectare site currently occupied by a small terrace of industrial units, which appear in be mainly in trade counter use. The current units are in reasonable condition and fully occupied. This is a high profile site with excellent pedestrian access to the City centre and good access for vehicles along the A270. The topography of the site is steeply sloping although the current building accommodates this well demonstrating that this would not be a concern for development. The site has no potential for expansion but has significant potential for full scale re-development to reflect the surrounding area which has seen large-scale redevelopment over the past few years. The site is allocated for 3,000 sq.m of employment space and would appear to offer good potential for medium term development if the current occupiers can be relocated.
- 5.37 **New England House** [D8] is a 0.27 hectare site consisting of a 1960s high-density office block that is currently operated by the City Council for the purposes of providing small start-up units and managed workspace, with a particular focus on creative industries such as digital media and other specialist sectors. No space exists on site for expansion or intensification without full-scale redevelopment. The Draft City Plan seeks to safeguard and strengthen New England House as the City's creative industry and digital media hub. On the premise that the surrounding cluster of buildings are redeveloped in accordance with the Draft City Plan, this building has the potential to remain

and be refurbished accordingly to upgrade the facilities and achieve this objective.

- 5.38 **Richardson's Scrapyard and Brewers Paint Merchant Site** [D9] is a 0.26 hectare site directly adjacent to Vantage Point. The site is in a high profile location fronting the street scene and located on a junction accessing the A270. It is currently occupied by a number of small units which include trade counter uses and a metal recycling facility. The site offers no significant potential for expansion or intensification however redevelopment of the site could significantly improve the attractiveness of the site and a more efficient layout. Along with the surrounding cluster of buildings, this site is allocated for the development of 3,000 sq.m of employment space within the Draft City Plan. and appears to offer good potential in what is an edge of City centre location.
- 5.39 **GB Liners site** [D10] is a 0.08 ha site located on the edge of the City centre. The current building is a 1970s metal clad depot warehouse building which remains fully occupied. The site is easily accessible by foot and close to Brighton railway station, although vehicular access is more constrained due to the central location with on street parking and narrow side streets. There is no room for expansion of this site and the associated use (containing regular HGV movements) is not appropriate in this location. The site provides an excellent opportunity for City centre employment re-development on the premise that the current occupier can be relocated accordingly. The Draft City Plan states the site has extant permission for B1a use and this should continue to be protected. Overall, an employment site containing a use that has become unsuitable for this location and now requires redevelopment to suit the edge of centre location.
- 5.40 **Blackman Street Site (land adjacent to Britannia House)** [D11] is a 0.11 hectare brownfield site that has been cleared for development. The site is located at the edge of the City centre within an area that has seen considerable development over the past few years. The site is well situated amongst local roads which are relatively unconstrained providing good access. The vacant plot is being marketed and is therefore ready to be developed. The site is allocated within the Draft City Plan for 2,000 sq.m of employment space. Overall, the site is in an excellent location for employment development and should be considered as an immediate option for development.
- 5.41 **Cheapside (south between Blackman Street and Whitecross Street)** [D12] is an 0.15 hectare site on the edge of the City centre, comprising a small office building and terrace of small industrial units with limited off-street parking. The site is located in a high-profile location which has recently seen a large amount of redevelopment. The site is allocated within the Draft City Plan for 2,000 sq.m of employment space. Overall, this site provides an excellent opportunity to continue the regeneration of this area.
- 5.42 **Edward Street Quarter** [D13] is a 1.93 hectare site occupied on the edge of the City centre providing B1a employment space. The site is a high profile site directly fronting Eastern Road and within 200 metres of the A23. Whilst some residential units surround the site, it is generally compatible with its

surroundings given that the site is self-contained and has roads surrounding it. This site is dominated by the new American Express building. The Draft City Plan proposes the development of 30,000 sq.m of office space (as part of American Express Phase 2) and 165 residential units on the site. Overall, this location has now been reinforced as a key office location in the City, effectively extending the City centre core office area.

- 5.43 **Circus Street Site** [D14] is a 0.75 hectare site situated on the edge of Central Brighton. The site currently comprises the derelict former municipal market buildings. The site is located close to main routes which incur some congestion at peak times however provide good strategic access. The site is also accessible for pedestrians and by public transport. There are no obvious barriers to redevelopment of the site, however given that the site is located in close proximity to residential units, amenity issues need to be considered alongside parking provision. The Draft City Plan identifies potential for employment space alongside residential and other uses to maximise the site's location close to the University, and this mix appears appropriate to help ensure the site attracts a new economic function. The site is subject to an adopted Supplementary Planning Document and the Council is working in partnership with the University of Brighton and Cathedral Group towards the regeneration of the site.
- 5.44 **Freshfield Road Business Park** [D15] is a 3.13 hectare site currently fully occupied, including a significant concentration of trade counters uses and building merchants which comprise the majority of occupiers. Whilst some of the buildings appear outdated, some modern units exist and they are all fit for purpose and this is evident through the activity on site with no buildings vacant. The site offers good strategic access whilst the internal road layout is good although a considerable amount of on-street parking does exist. Whilst the site is surrounded by residential units, it remains compatible given the trade counter uses which do not significantly affect local amenity. The site is identified in the Draft City Plan as an opportunity for comprehensive mixed use redevelopment in the form of B1, B8 employment floorspace and a minimum of 215 residential units. Whilst this is a longer term option, the assessment has illustrated that the site is currently delivering a good local employment source, albeit with only a limited proportion of B-class uses. On the basis of the site's location, office development may be less attractive whilst industrial or warehousing uses would need to remain of a similar scale taking account of local road access. There may continue to be pressure from retail/trade counter uses, and therefore some level of control may be required to ensure that the site's B-class employment role is not fundamentally undermined.
- 5.45 **Conway Street Industrial Area** [D16] is a 3.44 hectare site offering B1a and B1c employment space located close to Hove town centre. The site is spread across a large area with local roads running directly through it. The site currently provides a range of industrial and small warehousing units (many nearing the end of their economic life) and this is evident through some level of vacancies throughout the site, alongside a bus depot. One building (The Agora) was refurbished in recent years to provide new office accommodation, and take

up of this space has been reasonable. The site is in a sustainable location close to Hove town centre, with good public transport accessibility and proximity to the train station. The site is allocated in the Draft City Plan for a comprehensive redevelopment to retain and deliver an additional 3,000 sq.m in employment floorspace consisting of B1 office space and the provision of 150 residential units. Overall, this site is currently characterised by out-dated premises which requires redevelopment in accordance with the Draft City Plan, although the type and scale of employment uses needs to be considered in the context of the site's location. Further commentary on this site is provided in Section 8.0.

5.46 **Toads Hole Valley** [D17] is a 36.98 hectare greenfield site on the edge of the urban area bound by the A27 dual carriageway to the north, currently privately owned open space. The site has limited access to local services however offers excellent strategic and local access via the A27. Any development would require dedicated access arrangements off the A27 which would not impact adversely on the residential part of the site. Development proposals would need to be assessed in terms of their visual impact upon the South Downs National Park. This is a very high profile site located in a 'gateway' position into the City. The Draft City Plan allocates the site for a minimum of 700 residential units, 25,000 sq.m of B1a/b office space, a secondary school, provision of shops and cafes, a community facility and associated infrastructure. Overall, this site scores well for potential employment development. Further commentary on this site is provided in Section 8.0.

5.47 **South Portslade Industrial Estate** [D18] is a 5.39 ha site located to west of the City centre on the boundary with Adur District Council. The site currently offers a large range of employment uses including B1a, B1c, B8 and sui generis. The site is located directly along the A259 providing reasonably good strategic access along good quality roads connecting to the A27. The site is congested and the surrounding roads are shared with residential units whilst most of the employment units do not offer any dedicated parking facilities. The units and state of repair are of generally poorer quality. The site does however have limited vacant units demonstrating a good local employment offer for lower-grade space. The Draft City Plan allocates the site for an employment/mixed-use area to promote a comprehensive redevelopment approach. Overall this is a poor quality employment site but is still being actively used. Whilst the site appears to have limited potential for intensification, comprehensive redevelopment of the site (subject to land ownership) could help rationalise and improve the quality of the site in the future.

5.48 **Block J Brighton Station Site** [D19] is a 0.44 hectare site located on the edge of the City centre, forming part of the New England Quarter. This site is vacant brownfield land, flat and regular in shape. The site access is good along uncongested roads. The site has excellent potential for employment development on the basis of the large-scale redevelopment that has occurred within the vicinity of the site. The site already has extant permission for B1a

office redevelopment and this is to be protected through the Draft City Plan. Overall, the site is a good quality potential employment site.

- 5.49 **Block K Brighton Station Site** [D20] is a 0.06 hectare vacant site, situated on the edge of the City centre forming part of the New England Quarter, located directly adjacent to Brighton train station. The site is surrounded by Block J Brighton Station, Blackman Street Site and Cheapside all offering the potential to extend the regeneration of this area. The site is small and slightly constrained by its size and shape. This site is excellent for office development as per the extant planning permission. Overall, the site is a good quality potential employment site.
- 5.50 **Patcham Court Farm** [D21] is a 1.46 ha site located along the edge of the urban area bound by the A27 running directly along the north of the site. The site is currently occupied by vacant agricultural units. Development proposals will need to consider access problems already highlighted by the Highway Authority due to A27/A23 stacking issues, as well as visual impact on the South Downs National Park (to the north) and the Patcham Conservation Area located to the south. The site is however a large, regular shaped site, ideal for employment development. There have been previous proposals to accommodate leisure uses on the site, although it is understood that these are no longer being progressed and there has been other interest in developing new office space in this location. Overall, this site offers good potential for developing new strategic employment space, although the role of the site needs to be considered in the context of other development sites to ensure that proposals are complementary (particularly Toads Hole Valley).

## Non-allocated sites

- 5.51 Policy CP3 of the Draft City Plan provides general protection for unallocated sites or premises in employment use unless it can be demonstrated that they are redundant and incapable of meeting modern B1-B8 business needs. The Council has identified a sample of 10 unallocated sites across the City for consideration as part of this assessment in order to help understand the contribution these sites make to the City's overall portfolio of employment land. It is not an exhaustive review of such sites, and the inclusion (or not) of sites within the sample is solely based on considering a range of different types of sites.
- 5.52 **Old Steine Area** [N1] comprises a number of individual buildings including 'One Gloucester Place', '23 Grand Parade' and 'Pavilion House'. These Central Brighton sites offer excellent strategic access although congestion may exist during peak hours via City centre routes. The local access is more constrained with no allocated parking on any of the sites. Given the B1a use, the sites are all fully compatible with the surrounding City centre uses. Each site offers an attractive office space located within a high profile area. Both 23 Grand Parade and Pavillion House are converted residential units, whilst One Gloucester Place is recently refurbished office building. All three sites are of good quality providing reasonable quality small-scale office space.

- 5.53 **North Laine** [N2] consists of '1 Jubilee Street' and 'Gloucester Yard' offering B1a and B1c employment space. Both sites are located in the City centre providing excellent access to local shops and transport services. Vehicular access via busy City centre roads is more constrained however main routes are within close proximity. Both sites are fully compatible with City centre uses, surrounded by a residential, retail and commercial backdrop. Both sites offer an excellent employment offer; 1 Jubilee Street offers a modern office space in the heart of the City centre with ground floor retail space whilst Gloucester Yard is situated in a low profile location comprises new premises which appear to be meeting local employment needs.
- 5.54 **North Street** [N3] consists of 'Clarence House' and '27 North Street'. Both sites are situated directly adjoining each other in the heart of the City centre. Strategic access is reasonable however the central location means congested roads during peak hours. The local access is also average considering its location with limited parking facilities available. The nearest bus stops are within a 5-minute walk providing excellent public transport services. Both sites offer ground floor retail with upper floor office space however the ground floor spaces are vacant whilst only two floors are identified in office use. The buildings are in reasonable condition but appear somewhat dated. Encouraging high quality refurbishment would allow the premises to be better marketed in order to promote what is potentially a prominent office location.
- 5.55 **Trafalgar Place / Queens Road** [N4] consists of 'Queensbury House', 'Frederick Place' and 'Travis Perkins Site' which are all situated within Central Brighton. The strategic access for each site is relatively constrained given the central location whilst the local access is excellent for pedestrians and local transport services but all relatively constrained in terms of vehicular access. The Travis Perkins site in particular is constrained by its current location given the very poor access for HGVs along the narrow side streets. Both Queensbury House and Frederick Place are however fully compatible within the surrounding area given their B1a uses. Whilst the Travis Perkins site has the potential for redevelopment subject to the relocation of the current occupier, Queensbury House and Frederick Place demonstrate some vacancies and these buildings would be suitable for refurbishment in order to improve the employment offer.
- 5.56 **City Park** [N5] is a 2.29 hectare site situated on the edge of Hove. The site is comprises a purpose built business park, which is occupied by Legal & General and Lloyds Banking Group. The site is managed, providing high-level security at the entrance with a well landscaped site internally also offering parking facilities. Whilst the site is in a relatively low-profile location, it is believed that this is probably what the occupier wanted given to achieve. The units are in excellent condition, offering a high quality B1a employment space. Overall, a good quality employment site that should be safeguarded in the City Plan.
- 5.57 **Knoll Business Park** [N6] is a 0.99 hectare site situated to the west of Brighton centre along the A270. The site offers B1c employment space within an old converted school. This site is managed by BizSpace, providing a good local source of employment. Whilst the site is surrounded by a residential area,

constraining local accessibility, the small business units do not significantly affect the surrounding area. The site is well signposted and actively marketed along the A270 with limited vacant units. There is no scope for expansion or intensification of this employment site but it currently provides a good employment offer, suitable for small starter companies. Overall, this functions as a good local employment space that has been effectively managed, marketed and maintained by Bizspace.

- 5.58 **The Lanes Area** [N7] consists of 'Media Centre', 'Moore House' and 'Nile House'. These are all situated within the City centre providing excellent access to local services. Each site has relatively good strategic access given the City centre location whilst the local access is good with each site offering its own parking facilities. These sites are fully compatible within the City centre on the basis of their B1a use. There were no obvious constraints on these sites other than limited potential for expansion or intensification. Some vacant floorspace was identified across the sites however all offered reasonably good quality employment space in a high profile location. Overall, these sites are each performing an employment role and could be refurbished in the future to maintain a high quality City centre employment offer.
- 5.59 **Peacock Industrial Estate, Lyon Close, including Spitfire House** [N8] is a 2.30 hectare sites located out-of-centre. This site consists of predominantly retail units and trader counters whilst Spitfire House is used for B1a use. The site is located within a residential area restricting local access however the site is located within close proximity to a range of bus services offering excellent public transport provision. The site is self-contained, situated in a relatively high-profile location directly fronting the road. The trade counters are situated in units of reasonable quality that are fit-for-purpose. The site layout causes some congestion with on-street parking whilst a large vacant car park exists adjacent to Wickes which may provide potential for expansion. Whilst some units are under utilised, including Spitfire House, there is limited potential for intensification without full-scale redevelopment. Overall, this is an average quality site.
- 5.60 **Wellington Road Site, adjacent to South Portslade Industrial Estate** [N9] is a 0.96 hectare site offering B1c and B2 employment space which is located to the west of Brighton centre, adjacent to the City boundary. This high-profile site is located directly on the A259 providing excellent strategic access. Local access is also constrained with each unit containing limited parking facilities and congested entrances requiring on-street parking. The site is of relatively high-density forming a cluster of buildings which are of generally poor quality however the site has no vacant units illustrating its local importance as an employment site. The site offers no scope for intensification or expansion whilst any redevelopment option may be restricted given the likely fragmented ownership issues alongside the relocation of the existing occupiers. Overall, the site appears to cater for lower-grade activities in older, poorer quality accommodation.

- 5.61 **Zylo Works Factory Site** [N10] is a 0.20 hectare site is located on the edge of Brighton centre to the east. The site is surrounded by a residential area that provides poor access along narrow, steep residential roads, congested with on-street parking. Whilst the current B1c use remains reasonably compatible in the context of its surroundings, it is not considered an appropriate site for employment use. Whilst the building is of poor quality and in need of refurbishment or redevelopment, the site is fully occupied.
- 5.62 **Cambridge Mews** [11] is a 1.14 hectare site providing B1c employment space. The site is located directly adjacent to the B2185 providing reasonable quality strategic access whilst the local access is very narrow, located within a confined residential area. The B1c employment space consists of small, local workshops in the ground floor of the property whilst the upstairs remains residential. Whilst this low-profile, irregular shaped site is very constrained, no vacancies exist with the site appearing to be busy and actively used. The units are in reasonable quality although some units are in need of refurbishment. Overall, this site provides a reasonable employment offer despite the low market attractiveness and development constraints that exist and the subsequent low score against the criteria.

## Conclusions

- 5.63 Overall, the site assessments indicate that the City contains a reasonable range of employment sites of differing quality and type. The majority of sites assessed were predominantly within B1a and B1c uses with some B2 and smaller B8 uses also available. The assessment process has identified 11 (22%) high scoring good quality sites, 33 (66%) average quality sites and seven (12%) sites of poorer quality. A summary of site scorings is provided in Table 5.2. It should be noted that the broad 'good', 'average' and 'poor' groupings are purely indicative to provide an estimation of the quality of supply of sites.
- 5.64 The market attractiveness of sites was generally high, reflected by low vacancy rates. Even though a number of sites scored less well due to factors such as physical appearance or local access, they all appear to be meeting employment needs at some level. South Portslade for example, had very low vacancy levels despite the units being of relatively poor quality demonstrating its functional importance within the area. Sites such as Woodingdean Business Park achieved higher 'market attractiveness' scores due to better quality premises and higher profiles compared to some older sites.

Table 5.2 Summary of Site Assessments

Site Name	Status	Size (ha)	Other comments	Potential Uses	Score (out of 30)	Rank
1 Gloucester Place	Non allocated site	0.1	Part of Old Steine Area	B1a	26	Good
23 Grand Parade	Non allocated site	0.01	Part of Old Steine Area	B1a	26	
Pavilion House, 6-7 Old Steine	Non allocated site	0.02	Part of Old Steine Area	B1a	26	
1 Jubilee Street	Non allocated site	0.04	Part of North Laine Area	B1a	26	
Gloucester Yard, Gloucester Road	Non allocated site	0.05	Part of North Laine Area	B1a, B1b	26	
Block J, Brighton Station	Development Area Strategic Allocation	0.44	Cleared site	B1a/mixed use	25	
Media Centre, 9-12 Middle Street	Non allocated site	0.09	Part of The Lanes Area	B1a	25	
Moore House, Black Lion Street	Non allocated site	0.09	Part of The Lanes Area	B1a	25	
Nile House, Nile Street	Non allocated site	0.07	Part of The Lanes Area	B1a	25	
Vantage Point, Elder Place	Development Area Strategic Allocation	0.36	Vacant building	B1a/mixed use	24	
Trade Warehousing, Longley Ind Estate	Development Area Strategic Allocation	0.28	Currently occupied	B1a, B1c / mixed use	24	
Edward Street Quarter	Development Area Strategic Allocation	1.93		B1a	24	
Circus Street	Development Area Strategic Allocation	0.87	Vacant building	B1a	24	
City Park, The Drove, Hove	Non allocated site	2.3	Out-of-centre	B1a	24	
Centenary Industrial Estate	Safeguarded site	1.14		B1c, B2, B8	24	
New England House	Development Area Strategic Allocation	0.27		B1a/mixed use	24	
Bell Tower Industrial Estate	Safeguarded site	0.37		B1c	23	Average
GB Liners site	Development Area Strategic Allocation	0.08		B1a/mixed use	23	
Blackman Street Site	Development Area Strategic Allocation	0.11	Cleared site	B1a/mixed use	23	
Freshfield Road Industrial Estate	Development Area Strategic Allocation	3.13		B1c	23	
Block K, Brighton Station	Development Area Strategic Allocation	0.07	Cleared site	B1a	23	
27-28 North Street	Non allocated site	0.04	Part of North Street	B1a	23	
Clarence House, 30 North Street	Non allocated site	0.06	Part of North Street	B1a	23	
Hollingdean Industrial Estate	Safeguarded site	3.92		B1c, B2, B8	22	
Hove Technology Park	Safeguarded site	4.59		B1a, B1c	22	
Sussex House incl BT Depot	Safeguarded site	1.86		B1c, B8	22	
Woodingdean Business Park	Safeguarded site	3.9		B1, B2, B8	22	
Newton Road Industrial Estate	Safeguarded site	1.8		B1, B2, B8	22	
Portland Road Trading Estate (incl EDF)	Employment-led redevelopment site	3.26		B1	22	

Site Name	Status	Size (ha)	Other comments	Potential Uses	Score (out of 30)	Rank
Preston Barracks and Brighton University	Development Area Strategic Allocation	8.88		B1	22	Poor
125-163 Preston Road	Development Area Strategic Allocation	2.02		B1a	22	
Cheapside	Development Area Strategic Allocation	0.16		B1a / mixed use	22	
South Portslade Industrial Estate	Development Area Strategic Allocation	5.39		B1c/B2	22	
Woollards Field South	Development Area Strategic Allocation	2.69	Greenfield site	B1a	22	
Conway Street, Hove Station	Development Area Strategic Allocation	3.44		B1a	22	
English Close Industrial Estate	Safeguarded site	1.57		B1	21	
Hollingbury Industrial Estate	Safeguarded site	9.93		B1, B2, B8	21	
Home Farm Industrial Area	Safeguarded site	2.5		B1, B2, B8	21	
Knoll Business Park	Non allocated site	1.0		B1a/c	21	
Peacock Industrial Estate, Lyon Close (incl Spitfire House)	Development Area Strategic Allocation	2.31		B1a/c	21	
Queensbury House / Frederick Place / Travis Perkins	Non allocated site	0.32	Part of Trafalgar Place / Queens Road	B1a/c	21	
Richardson's Scrapyard and	Development Area Strategic Allocation	0.26		B1	21	
Land north of Newton Road	Employment-led redevelopment site	0.77		B1c / mixed use	20	
Moulsecoomb & Fairways Industrial Estate	Safeguarded site	1.34		B1, B2, B8	20	
Toads Hole Valley	Development Area Strategic Allocation	36.98		B1a/b	20	
Patcham Court Farm	Development Area Strategic Allocation	1.46	Vacant site	B1a	20	
Victoria Road Industrial Estate	Safeguarded site	2.18		B1, B2, B8	19	
Melbourne Street Industrial Estate	Employment-led redevelopment site	0.55		B1 / mixed use	19	
Gas Works Site	Development Area Strategic Allocation	2.35		B1a, B1c	19	
Cambridge Mews, Hove	Non allocated site	1.14		B1c	19	
Franklin Street Industrial Estate	Employment-led redevelopment site	0.54		B1 / mixed use	16	
Falmer Released Land	Development Area Strategic Allocation	1.92	Cleared site	B1a	16	
Hyde Business Park, Bevendean	Safeguarded site	4.17		B1c	15	
Zylo Works, Marine View	Non allocated site	0.21		B1c	15	
School Road Industrial Estate, Hove	Employment-led redevelopment site	1.22		B1c / mixed use	15	
Wellington Road, adj South Portslade	Non allocated site	0.96		B1c	14	

Source: NLP analysis

## 6.0 Future Requirements for B Class Employment Space

- 6.1 This section assesses B Class employment space requirements in Brighton & Hove in the period to 2030 using several different approaches as follows:
- a projections of employment growth in the main B class sectors (**labour demand**) derived from economic forecasts prepared by Experian;
  - b consideration of **past trends in completions of employment space** based on monitoring data supplied by BHCC, and how these might change in future;
  - c estimating future growth of local **labour supply** related to the planned housing target in the Draft City Plan (565 dwellings per annum) and the amount of jobs and employment space that this can support.
- 6.2 All these approaches have some limitations and careful thought needs to be given as to how appropriate each is to circumstances in Brighton & Hove. In addition, to be robust, the economic growth potential and likely demand for employment space in Brighton & Hove needs to be assessed under different future scenarios, to reflect lower or higher economic growth conditions arising in future. It should also be noted that the assessment is not purely quantitative, and that there may be qualitative factors that influence the future employment space requirements that need to be planned for.

### a. Forecasts of Job Growth

- 6.3 Forecasts of job growth for Brighton & Hove for the period up to 2030 were obtained from Experian. The May 2012 quarterly release has been used at the Council's request for consistency with the Coastal West Sussex SHMA that is currently being updated. It should be emphasised that such forecasts tend to be most reliable at national and regional scales and consequently less so at the local economy level, but they 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.

#### Scenario 1: Job Growth

- 6.4 The forecasts of job growth by sector used here reflect recent trends and are based on projections at regional level, and how economic sectors in Brighton & Hove have fared relative to the region's growth in the past. These forecasts also reflect the current post-recession economic climate, and the significant uncertainty surrounding future economic prospects.
- 6.5 The overall employment change in Brighton & Hove resulting from these forecasts is shown in Table 6.1 along with expected job growth in the main B class sectors. This includes an allowance for jobs in other 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 5). These indicate significant overall net job gains (just under 6,700 jobs) in the B-use classes in Brighton & Hove over the period to 2030, with strong growth in office-based activities and minor gains in distribution jobs offset by a moderate decline in manufacturing employment. This is within the context of overall job growth of just over 20,000 jobs predicted for the City over the period, which outside the B Class sectors will mainly be in the hospitality, recreation and education sectors.

Table 6.1 Forecast Employment Change in Brighton &amp; Hove 2010-2030

	No. of Jobs		Change
	2010	2030	2010-2030
Manufacturing (B1c/B2)*	7,070	5,470	-1,600
Distribution (B8)**	4,230	4,650	420
Offices (B1a/b)***	27,750	35,620	7,870
<b>Total B-class Jobs</b>	<b>39,040</b>	<b>45,730</b>	<b>6,690</b>
<b>Jobs in All Sectors</b>	<b>136,330</b>	<b>156,410</b>	<b>20,080</b>

Source: Experian / NLP analysis, 2012 - total jobs including self-employed

Totals rounded

\* includes vehicle repair and some construction activities \*\* includes parts of transport & communications sectors that use industrial land \*\*\* includes publishing and a proportion of government offices

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

- offices: 1 job per 10.5 m<sup>2</sup>
- industry: 1 job per 43 m<sup>2</sup>
- warehousing: 1 job per 65 m<sup>2</sup>

6.7 These assumptions are based on the latest HCA/Offpat guidance on employment densities published in 2010.<sup>16</sup> This guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due to increased flexible working and hot desking. This has resulted in a decrease in the amount of floorspace per office worker that is assumed compared to earlier guidance.

6.8 An allowance of 10% is added to all floorspace requirements to reflect a normal level of market vacancy in employment space. Where a reduction in jobs is

<sup>16</sup> Based on HCA/Offpat Employment Densities Guide, 2010

forecast, the associated negative floorspace was halved, to reflect the fact that not all of this employment space is likely to be lost.

Table 6.2 Experian Job Growth based Employment Space Requirements in Brighton & Hove, 2010-2030

	Floorspace (m <sup>2</sup> )
Manufacturing (B1c/B2)	-34,300
Distribution (B8)	30,130
Offices (B1a/b)	90,880
<b>Total</b>	<b>86,710</b>

Source: NLP analysis

- 6.9 This forecast net increase of 6,690 B Class jobs over a 20-year period (to 2030) which underpins this estimate of future employment space needs, is equivalent to an average of 335 additional jobs respectively each year. This is slightly higher than the job growth achieved in Brighton & Hove over the period 1997-2007 when Experian data indicates that B class jobs in the City increased by approximately 237 jobs per annum. On the basis of past performance, the above employment space forecasts could be regarded as a more optimistic estimate.

## b. Past Development Rates

- 6.10 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.

### Scenario 2: Past Development Rates

- 6.11 Data on past completions by B class sector was provided by Brighton & Hove City Council. Completions in the period 2000-2011 have been analysed, since this is a reasonably long period that reflects a full business cycle. Over this period, average annual net completions for B Class uses amounted to some 4,280m<sup>2</sup>, broken down as shown in Table 6.3. One third (33%) of net completions were for industrial space, with the remaining two thirds (67%) for offices. Gross completions were significantly higher (more than double), at an average of 11,880m<sup>2</sup> annually, but this masks some losses of employment space in development schemes.

Table 6.3 Annual Net Completion Rates in Brighton &amp; Hove, 2000-2011

Sector (Use Class)	Net annual completion (m <sup>2</sup> )	Gross annual completion (m <sup>2</sup> )
Industrial (B1c/B2/B8)	1,400	5,890
Office space (B1a/b)	2,880	5,990
<b>All</b>	<b>4,280</b>	<b>11,880</b>

Source: Brighton & Hove City Council

- 6.12 One view of future growth in Brighton & Hove could simply assume that future development rates carry on at the long term average achieved in the past. If it were assumed that the past net completion rates noted above continued in the 20 years between 2010-2030, it would equate to a need for 57,600m<sup>2</sup> of office space, and of 28,000m<sup>2</sup> of industrial space. In total, this would indicate demand for approximately 85,600m<sup>2</sup> of employment space by 2030, a figure slightly lower than that estimated using job forecasts (Table 6.4).

Table 6.4 Employment Space Requirement based on Past Trends Continuing, 2010-2030

Sector (Use Class)	Assumed annual completion rate (m <sup>2</sup> )	Floorspace Required (m <sup>2</sup> ) *
Industrial (B1c/B2/B8)	1,400	28,000
Office space (B1a/b)	2,880	57,600
<b>All</b>	<b>4,280</b>	<b>85,600</b>

Source: NLP analysis \* totals rounded

- 6.13 This approach assumes that past trends of office development in both a relatively buoyant as well as recessionary economic period would continue unchanged, and may not fully reflect the impacts of the current economic downturn or longer term workplace trends that could reduce future demand for office space. Conversely, it may underestimate future demand if the supply was constrained in the past, for example because of poor sites available or infrastructure/funding factors. If this approach is used, some adjustments to past completion rates are needed to reflect such factors.

### c. Future Labour Supply

- 6.14 It is also important to consider how many jobs, and hence how much employment space, would be needed to broadly match forecast growth of the City's resident workforce. In contrast to the two preceding approaches, this forecasts the supply of labour rather than labour demand. It then indicates the amount of new jobs needed to take-up this future supply of workers and minimise local unemployment, and how much employment space would be needed to accommodate these jobs.

### Scenario 3: Labour Supply (565 dw.p.a.)

- 6.15 The Brighton & Hove Draft City Plan Part One identifies a target to deliver a minimum of 11,300 net additional dwellings over the Plan period to 2030, which implies 565 dwellings per annum (dw.p.a.). The labour supply implications of these scenarios have been modelled by NLP to take account of economic activity rates and future pension age changes outlined in current national policy.
- 6.16 A 2001 Census workplace ratio was applied to these projections to convert the resident labour supply to a workplace-based equivalent. This provides an approximation of the number of people likely to be seeking work within Brighton & Hove as it allows for a proportion of the resident population commuting to jobs elsewhere and for some in-commuting. Overall, Brighton & Hove was a net exporter of labour in 2001, with a workplace ratio (the ratio of resident workers to workplace workers) of 1.05.
- 6.17 The workplace labour supply forecasts indicate an increase of 9,092 workers in the City by 2030 (Table 6.5). From these forecasts, the number of B Class jobs required was estimated assuming one additional job would be required for each additional worker forecast and based on the forecast proportion of B Class jobs within total jobs in Brighton & Hove in 2030.<sup>17</sup>

Table 6.5 Scenario 4: Forecast Labour Supply/Job Requirement in Brighton & Hove to 2030

	Average per year (2010-2030)	Change 2010-2030
Dwellings	565	11,300
Resident labour supply	636	12,723
Workplace labour supply	455	9,090
<b>B-class job requirement</b>	<b>140</b>	<b>2,660</b>

Source: Brighton & Hove City Council / NLP analysis

- 6.18 The resulting job numbers were then translated into estimated requirements for B class employment floorspace by applying the same standard employment densities used in the job growth based approach and adding a 10% vacancy allowance. The floorspace estimates for manufacturing and warehousing space were combined since these two sectors typically occupy the same types of sites at similar development densities.
- 6.19 Overall, future employment space requirements based on meeting the job needs of local residents would mean approximately 58,260 m<sup>2</sup> B-class employment space being required by 2030 (Table 6.6).

<sup>17</sup> Source: Experian employment forecasts, 2012

Table 6.6 B Class Floorspace Required from Labour Supply Growth

Use	Floorspace (m <sup>2</sup> ) 2010-2030
Industrial (B1c/B2/B8)	34,350
Offices (B1a/b)	23,910
<b>Total</b>	<b>58,260</b>

Source: NLP analysis

- 6.20 This labour supply based estimate provides a useful benchmark for comparison with labour demand approaches. Based on 565 net additional dwellings p.a., this forecast produces the lowest floorspace requirement of all the scenarios considered.
- 6.21 One potential drawback of this approach is that no change is assumed over time in the proportion of future jobs made up by office-based employment, which might be expected to increase in future. This might underestimate future office space requirements and overestimate industrial space needs.

## Net Employment Space Requirements

- 6.22 Drawing together the results from these different approaches and growth scenarios, Table 6.7 summarises the net floorspace requirement up to 2030 arising from each.

Table 6.7 Net Floorspace Requirement to 2030 for Different Growth Scenarios

Scenario  Use	Labour Demand	Past Development Rates	Labour Supply
	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
Offices (B1a/b)	90,880	57,600	23,910
Industrial (B1c/B2/B8)	-4,170	28,000	34,350
<b>All B uses</b>	<b>86,710</b>	<b>85,600</b>	<b>58,260</b>

Source: NLP analysis

- 6.23 These forecasts reflect a fairly wide range of potential space requirements. For industrial space, this would be between -4,170 m<sup>2</sup> (based on job growth) and 34,350 m<sup>2</sup> (housing/labour supply growth) up to 2030. For office space, the range is wider, between 23,910 m<sup>2</sup> (based on labour supply growth) and 90,880 m<sup>2</sup> (based on job growth).

## Safety Margin

- 6.24 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.
- 6.25 In a location like Brighton & Hove with constrained land supply and significant development pressure from other uses, there is a need to ensure a reasonable but not over-generous additional allowance that provides for some flexibility but avoids over-provision of scarce land. However, it also needs to reflect that there may be potential delays in some of the City's larger development sites coming forward for development.
- 6.26 The SEEPB guidance on employment land assessments 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 Brighton & Hove, the margins set out in Table 6.8 were added for B Class use based on two years of average net take-up. This appears an appropriate level relative to the estimated scale of the original requirement.

Table 6.8 Safety Margin Allowances

Use	Average Annual Take-up (m <sup>2</sup> )	Safety Margin Added (m <sup>2</sup> )
Offices (B1a/b)	2,880	5,760
Industrial (B1c/B2/B8)	1,400	2,800

Source: NLP analysis

## Convert to Gross Floorspace Requirements

- 6.27 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.
- 6.28 Judgements were made on the suitability and degree of the allowance for future losses which it would be appropriate to apply here based on analysis of supply-side deliverability factors and current trends in the market. Not all losses need to be replaced as some will reflect restructuring in the local economy as less manufacturing space is needed in future. In the past, loss of employment space in Brighton & Hove has largely been driven by falling demand for industrial (particularly B2) uses, while manufacturing employment is forecast to decline in the City over the next 20 years (Table 6.1). Wider land availability constraints provide a continued challenge for the City with regards to loss replacement. Nonetheless, market demand for industrial space in Brighton & Hove has remained high, although the City is suited to small scale and localised industrial activities.

6.29 Therefore, it is considered inappropriate for the City to replace all losses of industrial space going forward and it has been assumed that 50% of industrial losses will be replaced each year, equating to 2,240 m<sup>2</sup>. For offices, an allowance of 780 m<sup>2</sup> p.a. was applied, based on 25% of the average annual loss of office space over the last 11 years (2000-2011). A lower proportion of office losses have been replaced given that historically loss of office space has largely involved loss of older, redundant office space.

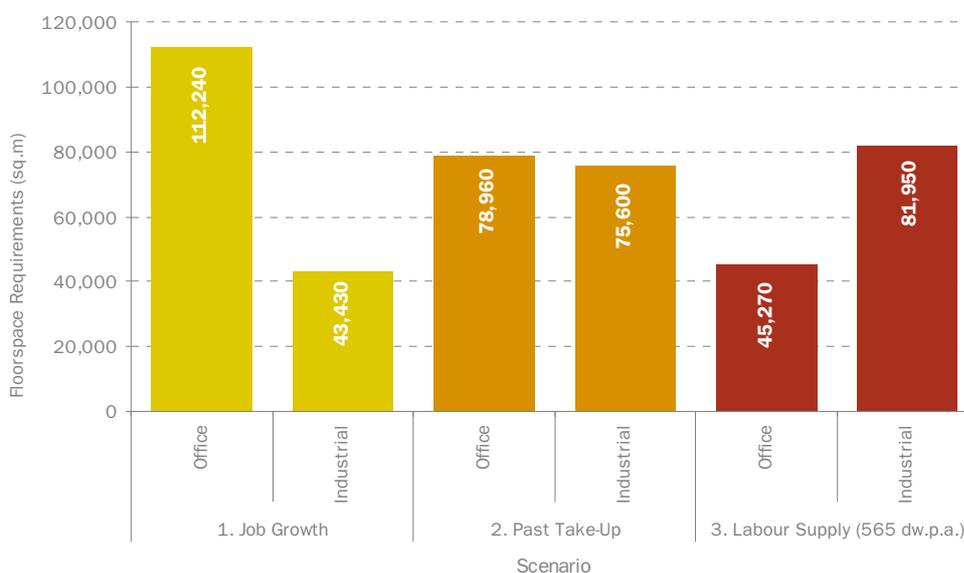
6.30 The resultant gross floorspace requirements incorporating these allowances are set out in Table 6.9 and Figure 6.1.

Table 6.9 Gross Floorspace Requirement by Scenario to 2030 (m2)

Use	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
Offices (B1a/b)	112,240	78,960	45,270
Industrial (B1c/B2/B8)	43,430	75,600	81,950
<b>All B uses</b>	<b>155,670</b>	<b>154,560</b>	<b>127,220</b>

Source: NLP analysis \* totals rounded

Figure 6.1 Gross Floorspace Requirements by Scenario (sq.m)



Source: NLP analysis

## Estimate Land Requirement

6.31 The final step, for all scenarios, was to translate floorspace into land requirements for both office and industrial uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using

the following assumptions and local adjustment factors to reflect the pattern of development in the City:

- **Industrial** – a plot ratio of 0.4 was applied so that a 1 ha site would be needed to accommodate 4,000 m<sup>2</sup> of employment floorspace; and
- **Offices** – it was assumed that 10% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 90% in higher density urban/City centre locations at a plot ratio of 2.0.

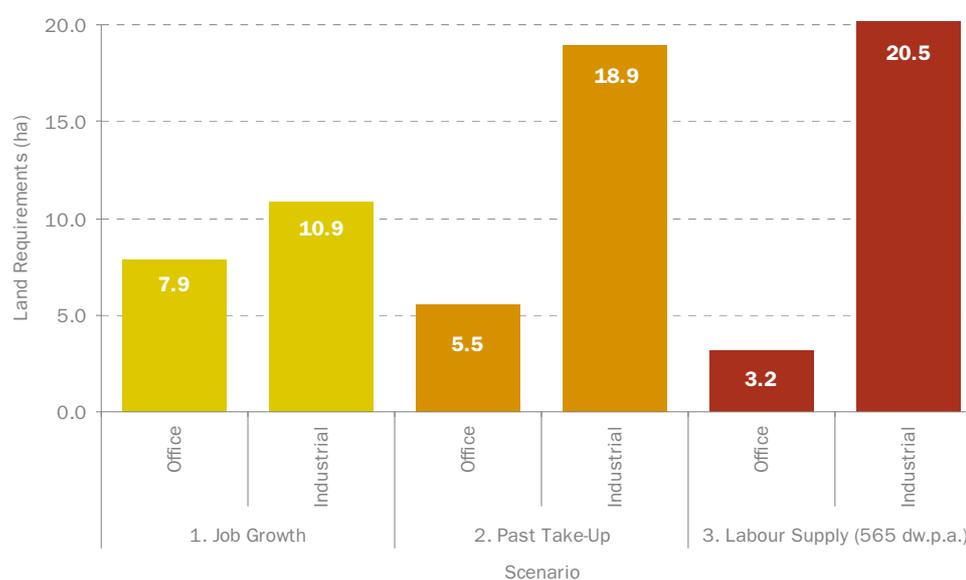
6.32 The resulting land requirements are set out in Table 6.10 and Figure 6.2.

Table 6.10 Gross Land Requirement by Scenario to 2030 (ha)

Use	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw. p.a)
Offices (B1a/b)	7.9	5.5	3.2
Industrial (B1c/B2/B8)	10.9	18.9	20.5
<b>All B uses</b>	<b>18.8</b>	<b>24.4</b>	<b>23.7</b>

Source: NLP analysis

Figure 6.2 Gross Land Requirement by Scenario (ha)



Source: NLP analysis

6.33 The range of land requirements for office development land is fairly narrow – between 3.2 and 7.9 ha to 2030, depending on the approach used. For industrial land, the range is slightly wider, between 10.9 and 20.5 ha to 2030.

## Comparison with 2006/09 Employment Land Studies

6.34 The Draft City Plan currently adopts the 2006 Employment Land Study and 2009 Update as the key evidence base to inform the overall quantum of employment land that the City should plan for to 2030. It is therefore useful to compare these requirements with the 2012 study to identify any deviation in overall employment space requirements.

6.35 Table 6.11 sets out a comparison of the various employment floorspace requirements set out in the 2006/2009 employment land studies and this study. While the different requirements relate to slightly different time periods they each apply to 20-year periods.

Table 6.11 Employment Space Requirement by Scenario

		Total (m <sup>2</sup> )	Industrial (m <sup>2</sup> )	Office (m <sup>2</sup> )
2006 Employment Land Study		86,800	-9,300	96,100
2009 Update		111,800	-9,300	121,100
2012 Employment Land Study	A. Job Growth	155,670	43,430	112,240
	B. Past Take-Up	154,560	75,600	78,960
	C. Labour Supply	127,220	81,950	45,270

6.36 In terms of total floorspace requirements, the range of scenarios tested for the period 2010-2030 all exceed the requirement identified in the 2006/09 employment land studies, particularly the job growth and past take-up scenarios - by a significant margin. However, it should be noted that the range of overall B-class requirements arising across the three scenarios in the 2012 study is relatively close, notwithstanding that they have been derived from different methodologies.

6.37 Conversely, the 2006 and 2009 studies used just one approach (2005 employment forecasts from Experian) as a basis for estimating future employment space requirements – this means no there was no opportunity to benchmark the results against other approaches. Comparing the 2005 and 2012 Experian forecasts, the main variation relates to the gross requirement for industrial floorspace; 43,430 m<sup>2</sup> of industrial (B1c/B2/B8) floorspace over the 20 years to 2030, compared with a negative requirement of 9,300 m<sup>2</sup> set out in the 2006/09 studies (covering the 20 year period to 2026). The majority of this relates to the assumptions about replacement of losses over the plan period, whereas the 2006/09 studies did not make allowance for any replacement of losses.

6.38 The estimated requirements for office floorspace are slightly more comparable between the studies, with the 2009 update forecasting a requirement for approximately 8,860 m<sup>2</sup> more floorspace than the 2012 study. This difference can be explained by a number of factors including the commissioning of

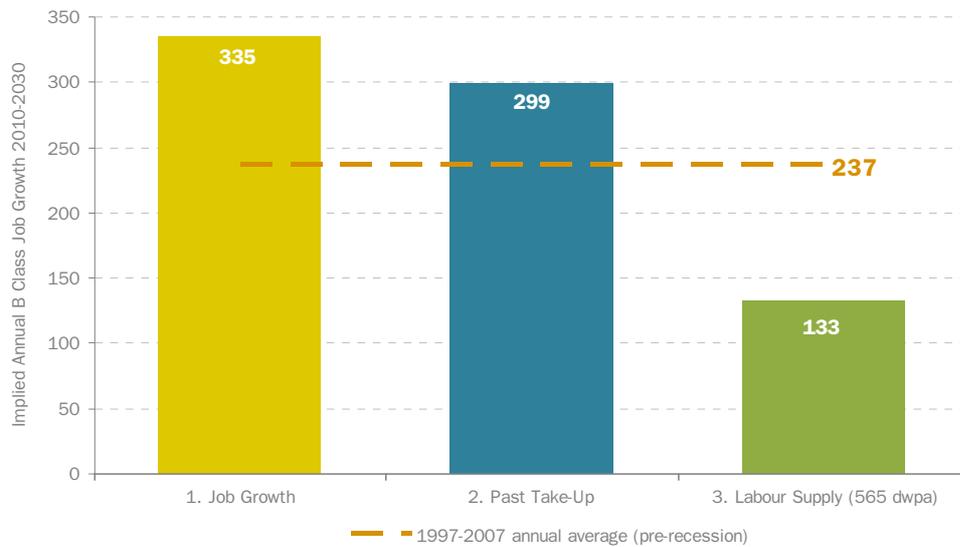
employment forecasts at different stages within the economic cycle, and the different application of employment density ratios and safety margins.

- 6.39 The forecast employment floorspace requirements identified by the 2006 Employment Land Study and 2009 Update were adopted in the Draft City Plan and subsequently used to inform the allocation of new Development Areas across the City to ensure there are enough employment sites and premises to meet this requirement. As such, the Draft City Plan does not specifically plan for any new industrial space (which may have arisen if allowance had been made within the 2006/09 studies for replacement of losses over the plan period), and instead identifies approximately 130,410m<sup>2</sup> B1 (office) employment floorspace across seven Development Areas and extant planning permissions to meet the requirement for between 96,100 and 121,100m<sup>2</sup> office floorspace over the 20 year period 2006-26.

## Sensitivity Tests

- 6.1 Given the 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.
- 6.2 It is useful to first compare the employment growth implied by these amounts of land with employment growth actually achieved in Brighton & Hove in recent years (Figure 6.3). The lowest labour supply based estimate implies an additional 133 B class jobs annually over the next 20 years, mostly office jobs. The highest growth estimate based on employment growth implies some 335 more B class jobs annually, again mostly office jobs. These figures compare with an average growth of 237 B class jobs in Brighton & Hove per year between 1997 and 2007 (i.e. the decade of growth before the recent recession). The job growth and past take-up scenarios lie closest to this past employment growth trend.

Figure 6.3 Annual Job Growth Implied by Scenarios



Source: NLP / Experian Analysis

Note: Estimated job levels for each scenario do not take account of additional floorspace allowance in the safety margin, which is identified for planning purposes and may not actually be developed

- 6.3 This indicates that job growth and past development trends based estimates could generate a slightly higher level of job creation than has been achieved in the City in the recent past. As that period was one of relatively strong economic growth (followed by a severe recession with an outlook of fragile recovery) these estimates would appear optimistic, but not inconsistent with the Council's vision for a strong and prosperous City by 2030. They would, however, exceed forecasts of labour supply growth in the area assuming that existing commuting relationships are maintained.
- 6.4 Other assumptions which can make a significant difference to the forecasts of future requirements include the allowance for replacement of future losses. With no allowance for future losses, the highest estimate of future industrial space needs would more than halve, reducing by 44,800m<sup>2</sup>. The lowest estimate relies upon the replacement of losses to maintain a positive requirement; not allowing for future losses would result in a negative requirement for industrial space of approximately -1,370m<sup>2</sup>.
- 6.5 Past trends suggest that loss of employment space has been relatively high in Brighton & Hove over the past 11 years, partly due to concentrations of industrial and office stock that is old and in poor condition, and increasing pressures on employment land from other, higher value uses (such as residential). Given the City's geographical constraints, it is likely that this trend will continue over the plan period, and it would therefore appear sensible to plan for some replacement of future losses.

## Conclusions

- 6.6 Three different scenarios of future employment space requirements have been considered, based on a number of approaches which reflect economic growth, development trends and potential housing supply factors. Two of these reflect assumptions of higher future economic growth in Brighton & Hove than the City has achieved in the recent past.
- 6.7 The overall space requirements related to these different scenarios range from 127,220m<sup>2</sup> to 155,670m<sup>2</sup> of all types of employment space up to 2030, implying in broad terms a need for between 18.8 ha and 24.4 ha of employment land.
- 6.8 In terms of total floorspace requirements, the range of scenarios tested for the period 2010-2030 all exceed the requirement identified in the 2006/09 employment land studies. With the exception of the labour supply scenario, the requirements for office space are broadly comparable. However, scenarios tested for the 2012 study all indicate a positive requirement for industrial space over the plan period, compared with a negative requirement identified by the 2006/09 studies.
- 6.9 Given an uncertain economic outlook, it is difficult to select the most likely option from these alternative growth pictures and all three scenarios have been tested against the City's supply position (Section 7.0). However with regards to offices, given that past trends are likely to have been constrained by lack of delivery in recent years, and that the labour supply scenario is constrained by housing delivery, the job growth scenario appears to best reflect the Council's economic vision for the City. At approximately 112,240m<sup>2</sup>, the office requirement is also comparable to the requirement identified by the previous 2006/09 studies and the subsequent target for new office space set out in the Draft City Plan (96,000-121,000m<sup>2</sup>).
- 6.10 In terms of industrial space, the Draft City Plan does not currently identify nor specifically plan for any additional floorspace. However, all scenarios tested in this study identify a positive requirement for industrial space to 2030, and in order to meet this need, the Council could consider planning to accommodate at least the job growth requirement (43,430m<sup>2</sup>) whilst providing capacity within the City to meet the past take-up requirement (75,600m<sup>2</sup>).
- 6.11 It is therefore recommended that the overall employment floorspace targets set out in the City Plan are updated to reflect the future requirements identified by the 2012 ELS study, to ensure that the final City Plan provides the framework to effectively address this need over the 20 years to 2030.

## 7.0 Need for Additional Employment Land

7.1 This section draws together the forecasts of future employment land needs in Section 6.0 and the estimates of land available on the area's existing and allocated employment sites in Section 5.0 to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

### Quantitative Balance

7.2 The previous section identified a need for between 127,220 m<sup>2</sup> and 155,670 m<sup>2</sup> of employment space up to 2030, including a modest safety margin largely to allow for delays in sites coming forward for development. The land requirements associated with these amounts of employment floorspace were estimated at between 18.8 and 24.4 ha.

### Allocated New Supply – Draft City Plan

7.3 The Council is currently proposing through its Draft City Plan to allocate new employment floorspace through designation of a number of strategic allocations within defined 'Development Areas'. For the purposes of this study, this identified floorspace is taken to be the amount of available employment land in the City to help meet this future need. The Draft City Plan indicates a total of 109,300m<sup>2</sup> employment floorspace across these sites plus a further 21,110m<sup>2</sup> relating to extant planning permissions across the City, broken down as follows (see Table 3.1 for a more detailed breakdown of employment space by Development Area):

Table 7.1 Available Employment Land in Brighton & Hove

Location	New Employment Space (m <sup>2</sup> )		
	Industrial (B1c/B2/B8)	Offices (B1a/b)	Total
Development Areas (DA2-DA8)	11,500	97,800	109,300
Extant Planning Commitments / Other sites across the City	n/a	21,107	21,107
<b>Total (rounded)</b>	<b>11,500*</b>	<b>118,910</b>	<b>130,410</b>

Source: Brighton & Hove City Council Draft City Plan

\*Total 11,500m<sup>2</sup> new industrial space assumes that 100% of identified development in DA2 Brighton Marina (Gas Works) and DA8 Shoreham Harbour (South Portslade) will accommodate industrial (B1c/B2/B8) uses

7.4 Most (91%) of the identified supply relates to office (B1a/b) space with very limited industrial (B1c/B2/B8) floorspace identified (approximately 9% of total) in the Draft City Plan. Whilst the Development Areas are spread across the City, the majority (60%) of total supply falls within the Eastern Road and Edward

Street (DA5), Toads Hole Valley (DA7) and New England Quarter and London Road (DA4) Development Areas.

- 7.5 Beyond the allocated new supply, the survey of sites in Section 5.0 identified very limited undeveloped land on existing sites to accommodate new development. Furthermore, as reported in Section 4.0, current levels of vacant employment space being marketed do not appear excessive against the 'normal' market vacancy rate of 8-10% to enable churn and choice. While the Draft City Plan encourages the upgrading and refurbishment and more efficient and effective use of sites, it assumes that there will be no net additional increase in employment space across these sites. Therefore, existing employment sites have been excluded from the following analysis of current/available supply, and no surplus capacity in terms of existing vacant floorspace has been added to the supply position.
- 7.6 A broad comparison of estimated demand for B Class space against all currently identified supply, as shown in Table 7.2, implies that Brighton & Hove would only have enough employment space in quantitative terms up to 2030 to accommodate the lowest future employment space requirement based on future labour supply. Under both the job growth and past take-up scenarios, the City would have a shortfall of between 24,000m<sup>2</sup> and 25,000m<sup>2</sup> of employment space to 2030.

Table 7.2 Demand/Supply of B Class employment space in Brighton & Hove

	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
Requirement for B Class space (m <sup>2</sup> )	155,670	154,560	127,220
Available employment space (m <sup>2</sup> )	130,410		
Surplus (+)/Shortfall (-)(m <sup>2</sup> )	<b>-25,260</b>	<b>-24,150</b>	<b>3,190</b>

## Needs of Different Employment Uses

- 7.7 Ensuring an adequate choice of types of sites is also important even if there is adequate supply in quantitative terms. This is necessary to meet needs of different employment sectors and the aims for diversity of employment opportunities at different skill levels. Potential supply of employment space for both industrial and office uses was therefore compared with estimated requirements for these uses.
- 7.8 Table 7.3 and Figure 7.1 compare the demand and supply situations for industrial and offices uses separately. This indicates that there should be more than enough supply available, in purely quantitative terms, to meet office needs arising under all demand estimates. However, under all demand estimates, this comparison suggests there would be a shortfall of industrial space to meet forecasted needs, with the deficit varying between 31,930m<sup>2</sup> and 70,450m<sup>2</sup> depending on the scenario.

7.9

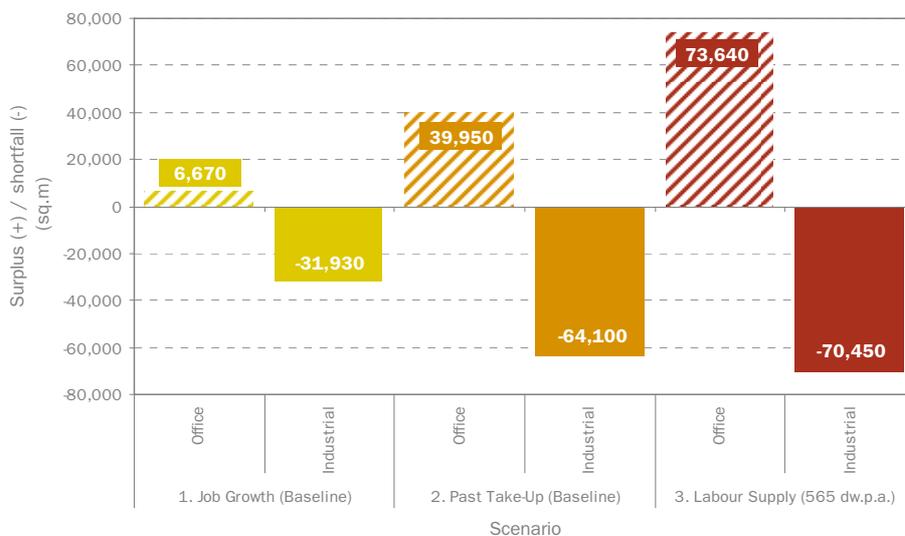
This predicted shortfall assumes that all of the proposed new floorspace associated with DA2 (Brighton Marina – Gas Works) and DA8 (Shoreham Harbour – South Portslade) comes forward for industrial (B1c/B2/B8) uses, with the remainder of Development Areas and identified sites across the City being identified for purely office (B1a/b) uses. Any deviation from this assumption regarding industrial space could potentially worsen the existing deficit of industrial space.

Table 7.3 Demand/Supply for office and industrial space to 2030 (m2)

	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
<b>Industrial</b>			
Industrial space requirement	43,430	75,600	81,950
Potential supply of industrial space	11,500*		
Surplus(+)/Shortfall(-)	-31,930	-64,100	-70,450
<b>Offices</b>			
Office space requirement	112,240	78,960	45,270
Potential supply of office space	118,910		
Surplus(+)/Shortfall(-)	6,670	39,950	73,640

\*assumes that 100% of employment floorspace identified in DA2 Brighton Marina and DA8 Shoreham Harbour will accommodate industrial (B1c/B2/B8) uses

Figure 7.1 Forecast surplus of office and industrial space to 2030 by scenario



Source: NLP analysis

- 7.10 This suggests that while the Draft City Plan is providing for sufficient office space to meet the City's employment development needs to 2030 (in purely quantitative terms), it is significantly under-providing against the need for industrial space that arises under all three forecast scenarios. This reflects the fact that the Draft City Plan's assumptions on employment floorspace requirements are derived from the 2006 Employment Land Study and 2009 Update which imply a requirement for solely office space (96,100m<sup>2</sup> - 121,100m<sup>2</sup> over the 20 years 2006-26).

### Alternative Supply Position

- 7.11 Following a period of public consultation, the Council have received a number of representations to the various employment policies set out in the Brighton & Hove Draft City Plan. These representations generally point to a lower overall development capacity for employment floorspace within the Development Areas than is currently identified by the Draft City Plan. Taken together, the effect of these representations would be a reduction of 46,850m<sup>2</sup> or 36% of the total employment floorspace capacity identified in the Draft City Plan. This would reduce the supply of available industrial space by 70% to 3,500m<sup>2</sup> and the available supply of office space by 33% to 80,060m<sup>2</sup>.
- 7.12 The Council have also revised a number of their assumptions around the identified extant planning commitments set out in the Draft City Plan based on updated information. Whilst the Patcham Court Farm site (located to the north of the City) is identified by Policy CP3 as a strategic allocation for new B1 employment floorspace in the Draft City Plan, a specific floorspace capacity figure was not identified and as a result this site does not feature within the 130,410m<sup>2</sup> of new employment floorspace identified across the City. However the Council have since quantified the potential development capacity of the site, based on an estimate of 6,500m<sup>2</sup> indicated by the 2006 Employment Land Study.
- 7.13 Table 7.4 below summarises the effect of these changes in terms of presenting an alternative supply position.

Table 7.4 Available Employment Land in Brighton & Hove (Alternative Supply)

Location	New B1 Employment Space (m <sup>2</sup> )		
	Industrial (B1c/B2/B8)	Offices (B1a/b)	Total
Development Areas (DA2-DA8)	3,500	68,800	72,300
Patcham Court Farm	n/a	6,500*	6,500
Extant Planning Commitments / Other sites across the City	n/a	4,760	4,760
<b>Total</b>	<b>3,500</b>	<b>80,060</b>	<b>83,560</b>

Source: Brighton & Hove City Council

\*6,500m<sup>2</sup> office space identified at Patcham Court Farm based on 2006 ELS assessment and was not previously included within the assessment of available new employment floorspace in Draft City Plan

- 7.14 For the purposes of this study, it is useful to test the various employment floorspace requirements to 2030 against this alternative supply position (i.e. if the reduction in floorspace put forward by all representations were to be accepted). In this situation, Brighton & Hove would not have enough employment space in quantitative terms to accommodate any of the three scenarios of future employment space requirements, with this potential shortfall varying between 43,660m<sup>2</sup> and 72,110m<sup>2</sup> to 2030.

Table 7.5 Demand/Supply of B Class employment space in Brighton &amp; Hove (Alternative Supply)

	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
Requirement for B Class space (m <sup>2</sup> )	155,670	154,560	127,220
Available employment space (m <sup>2</sup> )	83,560		
Surplus (+)/Shortfall (-)(m <sup>2</sup> )	<b>-72,110</b>	<b>-71,000</b>	<b>-43,660</b>

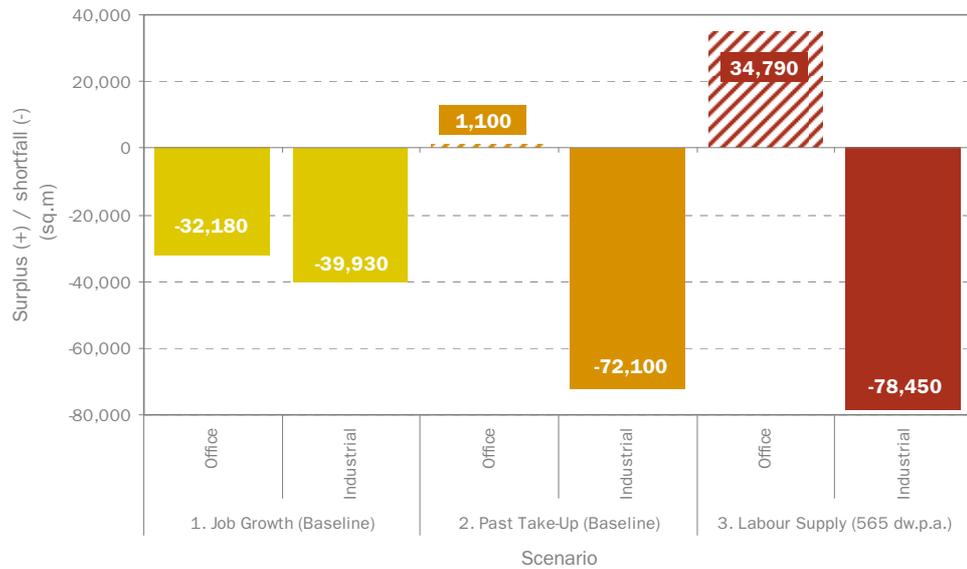
Source: NLP analysis

- 7.15 A comparison of the demand and supply situations for industrial and offices uses indicates that there would be a shortfall of industrial space to meet forecasted needs across all scenarios, while only one demand scenario (based on job growth) would result in an overall shortfall of office space by 2030 (the scenario that appears to best reflect the Council's economic vision for the City).
- 7.16 It should be noted that this alternative supply position could change again once the outcome of the Draft City Plan consultation becomes clear and further discussions have taken place with relevant land owners/developers etc.

Table 7.6 Demand/Supply for office and industrial space to 2030 (m2) (Alternative Supply)

	1. Job Growth	2. Past Take-up	3. Labour Supply (565 dw.p.a)
<b>Industrial</b>			
Industrial space requirement	43,430	75,600	81,950
Potential supply of industrial space	3,500		
Surplus(+)/Shortfall(-)	<b>-39,930</b>	<b>-72,100</b>	<b>-78,450</b>
<b>Offices</b>			
Office space requirement	112,240	78,960	45,270
Potential supply of office space	80,060		
Surplus(+)/Shortfall(-)	<b>-32,180</b>	<b>1,100</b>	<b>34,790</b>

Figure 7.2 Forecast surplus of office and industrial space to 2030 by scenario (Alternative Supply)



Source: NLP analysis

## Qualitative Factors

7.17

Even where no quantitative shortfall of space is identified, in some circumstances additional land may be needed for qualitative reasons, for example to:

- improve the choice of provision for occupiers;
- meet gaps in the supply of particular types of premises;
- improve or modernise the quality of current provision and so help attract more occupiers; or
- provide a better distribution of employment opportunities across the City or for specific settlements.

7.18

Qualitative needs are considered for each broad property type/area individually.

## Offices

7.19

For office uses, the analysis above suggests a modest overall surplus of employment land supply across the City as a whole. However, this is based on office supply identified by the Draft City Plan within a number of key Development Areas and it appears at this stage that some of this available supply is unlikely to come forward as initially indicated. For example, some of the identified supply is located in areas outside of the City centre that are deemed unviable and unattractive to developers. If significant allocations such as Toads Hole Valley were to come forward and deliver the quantum of office space indicated by the Draft City Plan, this would bring to the City's office market a major out-of-town/business park product which remains relatively

untested in Brighton & Hove in market terms. Whilst this situation may change as the market and land values improve, it represents the current position in terms of progressing the City Plan.

- 7.20 Whilst the City already has a sizeable stock of office premises and a reasonable level of vacancy, market consultation suggests that much of the vacant space comprises older, purpose built premises in edge of centre/out of centre locations that lack market/occupier appeal. Meanwhile, Brighton & Hove suffers from a significant shortage of Grade A office space, with very little new development having been completed in the last 20 years.
- 7.21 It could therefore be argued that additional land should be allocated in the City to maintain a high quality offer and improve the choice for occupiers. However, location is key and any new space must appeal to the market in order to be viable in the current climate and foreseeable future. This is considered further in the analysis presented in Section 8.0.

## Industrial

- 7.22 From the above analysis, there appears to be a quantitative need for additional land for industrial uses across the City as a whole, even if strategic allocations within Development Areas 2 (Brighton Marina) and 8 (Shoreham Harbour) were to come forward. However, there is already some uncertainty about whether these new allocations will realistically be brought forward over the plan period, largely due to viability and de-contamination issues.
- 7.23 In addition, current vacancy levels for industrial space are well below normal market levels, and the consultation process indicated difficulties for firms finding suitable and available space of a reasonable quality for expansion or relocation. Agents report that many enquiries for industrial space in the City cannot be met with high occupancy on existing sites preventing churn and modernisation that the City's stock desperately needs.
- 7.24 This suggests that, to minimise the risk of current allocations not coming forward, and to cater for the needs of firms across the City, there may be a qualitative need for some more industrial sites that are readily available and better located to strategic roads and transport links. Such sites might also have better prospects of attracting developers and could also enable the decanting of firms in established industrial areas (often in unsuitable, residential locations) and modernisation of older stock.
- 7.25 Alternatively, the City Plan's approach could focus on redeveloping and intensifying existing industrial sites that perform well as an employment location. For example, rather than allowing CP3.4 sites to be developed for mixed uses (retaining the same amount of employment floorspace), the City Plan could encourage employment only re-development on these sites to result in a net gain in employment space.

## Start-up Premises

- 7.26 As noted earlier, whilst the City has a modest amount of space targeted towards small, start-up businesses, consultations with local agents suggest that the City could accommodate further start-up office developments offering small (e.g. between 90-200 m<sup>2</sup>) fully equipped units. As the City's universities continue to grow, Brighton & Hove will need to ensure that it is positioned to accommodate spin-off/start-ups by providing appropriate and affordable business premises, particularly catering for the growing digital and creative media sectors.

## Conclusions

- 7.27 Based on available employment space identified by the Draft City Plan<sup>18</sup>, in quantitative terms, Brighton & Hove has more than enough office floorspace to meet future needs up to 2030, under various scenarios of future growth.
- 7.28 However, following a period of public consultation, the Council have received a number of representations which potentially indicate a lower overall development capacity within the Development Areas than the City Plan currently assumes. Depending upon the outcome of the consultation and any subsequent reduction in available supply, this may result in a shortfall of office floorspace under one or more of the scenarios to 2030.
- 7.29 The City's office market suffers from a range of qualitative factors such as high vacancy of older, edge of centre office premises and lack of City centre modern, Grade A space that occupiers increasingly demand. Therefore, any new office space allocated by the new City Plan should be located in areas of the City that continue to be in demand from occupiers (particularly in the growing digital and creative media sector) and that can provide longer term, viable development opportunities, such as Brighton City Centre/Hove Station.
- 7.30 The supply of industrial space identified in the Draft City Plan is insufficient to meet future needs under all future development scenarios. Whilst Brighton & Hove is not perceived as an important industrial location, demand for premises remains strong and all three scenarios indicate a continuing role for the City's industrial economy. It also appears likely at this stage that the potential industrial supply/allocations identified in the Draft City Plan could reduce significantly, thereby worsening the existing shortfall.
- 7.31 The City's existing stock of industrial premises are also in need of modernisation and upgrading, although continued high occupancy and low vacancy prevent the churn that the market needs to remain competitive and attractive to firms.

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<sup>18</sup> 130,410m<sup>2</sup> comprising seven Development Areas and extant planning permissions



## 8.0 Policy & Delivery Implications

- 8.1 This section considers appropriate policy approaches in relation to employment space for the emerging City Plan as well as other measures which may be required to support Brighton & Hove's economic growth objectives.

### Policy Approaches

- 8.2 The scenarios considered in the previous sections indicate the broad scale and type of growth arising from different approaches to modelling the City's future employment space needs. To varying degrees, they reflect both indigenous needs arising within Brighton & Hove as well as – particularly in the case of the scenarios based on past development rates – a degree of footloose demand which operates across the City's boundaries from the wider sub-region. The Council's policy approach should (particularly in the aftermath of a period of economic recession) aim to at least fully meet Brighton & Hove's employment space needs so that the City's economy is not constrained, recognising that developments in adjoining areas will also be a key influence. At the stakeholder workshop, views were expressed that Brighton & Hove should aim to at least maintain past job growth levels in the early years of the Plan, but then be prepared to exceed these as economic conditions improve.
- 8.3 However to ensure a flexible and responsive policy framework, it will be necessary not just to focus on meeting forecast quantitative requirements (which will fluctuate over time), but to think about the opportunities and risks that flow from particular policies. That might concern how delivery can be prioritised in some locations or for some types of employment uses, or how scope can be created for meeting as yet undefined inward investment opportunities, but also not protecting legacy employment sites for which there is no longer a productive employment use. In a location with relatively constrained land supply, planning for employment will need to be balanced against pressures from other land uses, as well as other City Plan objectives such as planned housing growth. For instance, the City Plan recognises that the City is unable to meet its housing need in full and as a result has sought a balanced approach to meeting needs. B-class employment space also competes with non B-class uses such as retail, leisure and community uses (outside the remit of this study), some of which may also generate local economic benefits or have identified needs.
- 8.4 This requires choices in the City Plan about which sites to protect or allocate for employment development, or which to consider for release to other uses (either in whole or part). That judgement must ultimately take account of:
- a the local benefits of B-class sectors and the need to maintain a diversified and resilient economy that is open to growth and new economic opportunities as they arise (as envisaged by the NPPF);

- b the economic and other outcomes (e.g. labour market) if some sectors become displaced or are otherwise constrained from expanding within the City;
- c the need to encourage growth of high quality jobs within the City to address the disparity between resident employee earnings (higher) and workplace earnings (lower);
- d the trade-off between seeking more intensive use of the restricted supply of sites and thereby yielding higher net job creation over time, and identified business needs (as specified in the NPPF) which may for some activities or sectors imply a less efficient use of land in order to function effectively; and
- e setting targets for delivery of new employment space on sites to provide clarity and certainty for investors and making a practical assessment of what the market can deliver at any point in time (i.e. maintaining a delivery trajectory for employment space with short, medium and longer-term opportunities over the life of the Plan).

8.5 In a situation whereby the City Plan Part One is unable to fully meet the identified needs of B class sectors in quantitative and qualitative terms as identified by this study, the Council may wish to review this position further and potentially consider further allocations as part of the City Plan Part Two.

8.6 The current Draft City Plan seeks to plan for a choice of sites and locations to meet the needs of particular sectors and occupier needs. Some further commentary on the approach and potential options for providing for the different B-class uses are considered below.

## Office Uses

8.7 Brighton & Hove's office market is focused on Central Brighton, comprising mainly older converted space and some limited space which has been recently refurbished. Rents for newer or refurbished space are generally high, and vacancy levels low. There are also smaller office clusters in other locations such as Hove town centre and along Preston Road which appear to be performing to varying degrees, as well as some single occupier sites (e.g. City Park in Hove).

8.8 The general trend in the City over recent years has been a move away from major corporate occupiers (American Express being the notable exception) and relocations looking for large floorplates to office needs arising from the City's base of small and medium-sized businesses, particularly in digital media and related sectors and spin-outs from the universities. These types of firms overwhelmingly want to be located in a central location close to facilities and amenities, and the cultural attractions for which the City is known.

8.9 In this context, the Draft City Plan's focus on the primacy of Central Brighton for office development is appropriate both in terms of protecting existing space (particularly important if insufficient new space is being brought to market and

as a source of cheaper secondary space) and for new development. The upper range of office space requirements identified through this study are slightly lower than those currently assumed in the Draft City Plan. This reflects the latest employment densities which point to more efficient use of office space, but also that the forecasts used have been prepared in less buoyant economic times. The 112,000 sq.m estimate derived from the job growth forecasts sits within the 96,000 – 121,000 sq.m range already assumed in the City Plan, and appears the most reasonable basis for planning purposes in the context of the City's growing service sector economy compared to the other scenarios considered.

8.10 In terms of how these future office needs are accommodated and distributed, this should be informed by an assessment of what the market can deliver, the types of space required and locations of strongest demand. A key barrier in this regard has been the lack of delivery of high quality Grade A space (even before the recession) which leads to a perception that the City is “punching below its weight” in office terms, and the market feedback was that the City could sustain significantly more office development activity. This has a significant long-term implication because lack of space may ultimately constrain the City's ability to retain its businesses as they grow and expand. This lack of delivery may reflect a number of factors:

- 1 a market perception of a lack of supply of suitable sites in central Brighton for new office development;
- 2 the demand profile from smaller firms in Brighton & Hove means weaker covenant strengths in conventional funding markets and limited prospects for pre-letting; and
- 3 development viability and pressure from higher value uses (e.g. residential) within mixed-use schemes, which have become particularly acute in the current economic environment.

8.11 Therefore, one of the key challenges the Council must seek to manage is how to ensure delivery of new space, particularly in Central Brighton, but also structuring supply in other parts of the City to respond to market opportunities. This is considered in more detail below.

### Central Brighton

8.12 A range of sites already exist in Central Brighton with extant planning permission and/or strategic allocations for office development. Notwithstanding this, the key issue is that very limited new space has been developed and consequently there has been reliance on refurbishing second hand space (e.g. Sovereign House, One Gloucester Place). As noted above, over time this may constrain the ability of small and medium sized businesses to grow and expand. The market consequence of this shortage of good quality space is that rental levels have gradually increased for this type of space to the extent that they are regarded as uncompetitive by many of the City's small and growing businesses. This can be mitigated to some extent through the provision of managed (e.g. Regus House) and subsidised premises (e.g. New England

House) but it points to underlying risks to the City's competitiveness with regard to the availability of office space.

- 8.13 Against this backdrop, it would appear that the Council needs to work with landowners and developers to unlock the various office commitments already in place and, in time, the floorspace allocations indicated for the Development Areas. The supporting text for Policy CP3 already identifies that some flexibility may be considered subject to a number of tests, including where there is demonstrable benefit in terms of early (re)development opportunities. Some caution is required because, as noted in Section 7.0, a quantitative shortfall of supply for office space could emerge if all sites deliver below the current floorspace assumptions on sites (and if no additional or replacement supply is identified). However, an assessment needs to be undertaken to construct a realistic delivery trajectory for City centre office space for the short, medium and longer term. The other tests regarding protection of existing office accommodation in Central Brighton provided for by Policy SA2 of the Draft City Plan appear appropriate at least until such time as new office space delivery is significantly increased, and have a longer term value in terms of ensuring a choice and range of premises.

#### Toads Hole Valley

- 8.14 Through Policy DA7, the Draft City Plan currently identifies land at Toads Hole Valley for a minimum of 25,000m<sup>2</sup> B1a/B1b uses as part of a wider mixed-use development, located directly on the A27. This would effectively create a type of out-of-town business park product which arguably does not currently exist in the Brighton & Hove market. By way of comparison, it would be equivalent to five times the amount of office space that has recently been completed at Woodingdean Business Park, the only other significant out-of-town business park development but which is much smaller in scale and in a more peripheral location.
- 8.15 Market views were mixed on the impact that new space at Toads Hole Valley would have on the City's office market. Some expressed concern that it could compete with Central Brighton, particularly if the delivery of office space remains constrained in the City centre. Others considered such a development would represent a complementary product to the City centre to cater for a different profile of firms, and for the first time would provide the City with a strategic office park product, noting that this model works successfully in many other comparable locations (where out-of-town operates in tandem with City-centre, to the benefit of both). This could provide increased attraction and flexibility for potential office occupiers (including inward investment), and could help mitigate against any potential future loss of businesses to proposed larger office developments elsewhere (e.g. Burgess Hill). The City's current inward investment strategy generally focuses on expanding niche sectors such as digital media and creative businesses which will generally prefer a City centre location, although this does not necessarily obviate the need to provide for wider investment opportunities.

- 8.16 Ultimately this is an untested proposition in Brighton & Hove in commercial property market terms, and much will depend on the type, quality and marketing of the space that eventually comes forward. However, a phased approach to office development and differentiated offer at this location would not be inconsistent with the City's overall economic ambitions.

### Other locations

- 8.17 Office accommodation can also be found in clusters elsewhere in the City, some falling within designated employment areas and some outside. This is an important source of additional supply to ensure diversity and choice for a range of local business needs.
- 8.18 Specific comments on other locations with office policy designations in the Draft City Plan are set out below:
- **DA3 Lewes Road** – as part of the City's academic corridor, this would appear to represent a potentially attractive location for small-scale office development particularly to accommodate spin-out businesses alongside the wider development of the universities, business school and innovation centre.
  - **DA4 New England Quarter and London Road** – the commentary above regarding Central Brighton equally applies to the New England Quarter element of this area, but separate consideration is required for the Preston Road office corridor. This currently comprises a number of 1980s/90s office buildings, some of which have recently been refurbished, but where significant vacancy exists and rental levels have been significantly discounted in order to attract occupiers. The market view is that this location now performs less well in office terms, being neither at the heart of the City centre (the site is some distance from facilities and amenities) nor sufficiently out-of-town to offer the benefits of strategic access. This may require a review of the current assumptions about retaining or re-providing office floorspace in this location, but this should only be undertaken in conjunction with a more detailed assessment of the prospects for significant increased office space delivery in Central Brighton and at Toads Hole Valley.
  - **DA5 Eastern Road / Edward Street** – represents the main east/west corridor which runs from the edge of the City centre towards Kemp Town. The policy mainly provides for Phase 2 development of the American Express headquarters (of which Phase 1 has now been completed) and small provision as part of the wider mixed-use development of the Circus Street site. Whilst these assumptions appear reasonable given the location and nature of this area (and proximity to the University), the longer-term potential identified for some office provision on the Freshfield Road/Gala Bingo site appears less clear given its distance from the City centre and that this area does not currently function as an office location, however the site still has potential to be retained for industrial uses.

- **DA6 Hove Station** – this policy provides for an employment-led mixed use redevelopment of the Conway Street industrial area where existing floorspace will be retained and increased slightly (i.e. up to 21,700 sq.m) to provide high quality B1 accommodation. Based on the assessment contained in Section 5.0, it is considered that this site is likely to be most suitable for B1a offices given the surrounding residential environment, but also to maximise the site’s proximity to Hove town centre and railway station. It needs to be recognised that this location will be a smaller office centre than, for example, Central Brighton, but there is some market feedback that suggests an increasing interest from smaller office occupiers in this area (potentially being priced out of Central Brighton). Provision of small scale flexible B1a/c accommodation across a range of unit sizes would appear consistent with this demand profile and the qualities of the location more generally, although the total quantum of space currently envisaged by the policy appears significant unless it is intended to be phased over a number of years.

### Upgrading existing office supply

- 8.19 Alongside provision of new supply as noted above, upgrading and renewal of the City’s existing stock of office accommodation will also be important. It will not only ensure that this space remains attractive to the market, but may also provide the opportunity to create additional supply. This may comprise redevelopment, but qualitative improvements can also be delivered through refurbishment of existing buildings to some extent. The Draft City Plan is broadly supportive of this type of upgrading and renewal through Policies CP3 and SA2.
- 8.20 There are some examples of such upgrading and redevelopment having occurred in recent years, such as Sovereign House on Church Street (an old office building redeveloped to a higher density and quality) and the refurbishment of One Gloucester Place which was occupied by Lloyds TSB for 25 years before becoming vacant in 2010. Office rental levels in Central Brighton are likely to continue to provide the greatest incentive for this type of renewal activity (particularly until such time as new office supply is delivered), but there may also be opportunities in other parts of the City.

### Industrial Uses

- 8.21 As noted earlier, Brighton & Hove did not develop a historic industrial base to any significant extent. Consequently, unlike some other locations, the City does not have a large stock of older industrial sites or premises as part of the supply. Instead, and as assessed in Section 5.0, the City has a portfolio of small and medium-sized industrial estates mainly developed in the 1950s/60s where ad hoc upgrading and renewal has since taken place. Policy CP3 of the Draft City Plan provides protection of these sites and encourages their future refurbishment and more efficient redevelopment.

- 8.22 Whilst the City is not generally regarded as a major industrial location, market feedback noted that the industrial market in the City is particularly tight and has been for a number of years. There are consistent reports from agents of industrial space enquiries being diverted to adjoining areas where the available stock of space is greater. In terms of quantitative requirements, the main implication of the analysis contained in Section 6.0 is that a modest positive requirement for industrial floorspace is identified under all three scenarios. The job growth (43,400 sq.m) and past take-up (75,600 sq.m) approaches are considered the more accurate guide for planning purposes, whilst it is recognised that the labour supply based estimate is likely to be an overestimate. The requirement is relatively modest; to provide some context, these requirements amount to between 9 – 16% of the total stock of industrial and warehousing space in Brighton & Hove recorded by the VOA, to be delivered over a 20-year period.
- 8.23 This positive requirement is very much supported by qualitative market feedback which indicates a general perception that Brighton & Hove is “full up” for industrial activities, and that the limited spare capacity in the system may be resulting in adverse outcomes for occupiers (ie businesses) – for example, not being able to expand or relocate to meet business needs, or being ‘locked’ in premises that are no longer suitable as insufficient alternatives exist. This also has direct policy implications for the City Plan because it may impede the ability to achieve intensification and mixed-use redevelopment of sites if they are continually occupied and firms are reluctant to move. It also provides no incentive or ability for site owners to manage their space effectively and improve the quality of the estates/premises.
- 8.24 The earlier 2006/09 employment land studies identified a negative requirement for industrial space, and accordingly the Draft City Plan currently makes very limited specific provision for industrial needs. In the context of accommodating a positive industrial floorspace requirement, a number of options emerge:
- 1 Increase the industrial floorspace capacity assumed on those Development Areas currently identified by the Draft City Plan as having potential for industrial activities. These are assumed to be:
    - i DA2 Brighton Marina (Gas Works) – where there is scope to form an extension to the existing Bell Tower estate, however this will need to take account of the identified remediation costs and viability issues on the site; and
    - ii DA8 (Shoreham Harbour and South Portslade) – ongoing masterplan work for the Council indicates potential capacity for net additional floorspace within Aldrington Basin, although this will need to be offset against potential floorspace losses associated with the redevelopment of South Portslade Industrial Estate.
  - 2 Explore opportunities to deliver industrial floorspace within other Development Areas – from the analysis in Section 5.0, it is considered that this is most likely to be achieved within DA3 (Lewes Road – for example at Preston Barracks) or at DA7 (Toads Hole Valley) where some

of the allocated B1a employment floorspace could be substituted or supplemented by industrial floorspace subject to appropriate masterplanning;

- 3 Consider the scope to achieve a net gain in employment floorspace (rather than no net loss) on the identified employment-led mixed use redevelopment sites, and/or rely on general intensification of existing industrial sites. This could make a contribution to increasing supply (particularly if sites can be developed more efficiently) but may have risks given the low vacancy and limited immediate development opportunities that exist on the majority of the City's established estates. The site assessments suggest that realistically this is most likely to occur on Portland Road and Land North of Newtown Road which are the largest and most accessible of all CP3.4 sites and therefore have the most potential to generate the critical mass needed to achieve any net gain; and
- 4 Not specifically identify additional capacity for industrial space, and by implication, assume that these needs are met on non-allocated sites or are displaced to adjoining local authority areas. Whilst the review in Section 3.0 did identify some capacity for industrial development in adjoining areas, such an approach would need to be carefully investigated through duty to cooperate arrangements to ensure consistency with the Development Plans in adjoining authorities. Beyond this, however, it would not appear to be a particularly sustainable option, and would unduly risk harming activities which form an important part of any functioning economy. Furthermore, some of the growth sectors that the City is seeking to expand and attract (e.g. environmental technologies) may require mixed office and industrial premises. For example, the Brighton & Hove Creative Industries Workspace Study identifies that the majority (60%) of the creative industries sector – one of the City's key growth sectors – requires premises other than traditional office space and that supply of this type of creative workspace must be increased in light of existing shortages of warehousing and light industrial premises.

8.25 It is also worth noting that the positive requirements for industrial space set out in Section 6.0 incorporate some allowance for replacement of ongoing losses of employment space to other uses<sup>19</sup>, whilst recognising the difficulty of continuing to replace losses due to the City's physical constraints and lack of readily available land for development. Theoretically, a reduction in the requirement for space could be achieved by removing or reducing the allowance for replacing for windfall losses of employment space. However, such an approach would run counter to the well established principle in employment land assessments. Moreover, such an accounting exercise would risk a diminution in the amount of industrial space available and lead to a further tightening in the market for space, potentially harming the City's economic vitality.

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<sup>19</sup> This reflects the approach advocated in the ODPM guidance and the SEEPB Guidance (2010)

- 8.26 Given the acute capacity constraints faced by the City and the difficulty in identifying any readily available ‘new’ sites, it will be important for the City Plan Part Two to consider how any identified needs that are not fully provided for within Part One can be met, potentially through identifying additional allocations.

#### **Upgrading /intensification of existing industrial sites**

- 8.27 The analysis above considered the potential options for accommodating new industrial space in the City. Policy CP3 also encourages the upgrading and refurbishment of existing industrial development, and where possible, redevelopment so they can be used more efficiently and improve the environment of some sites.
- 8.28 Barriers to the redevelopment of industrial premises in the City include high occupancy and low vacancy (making redevelopment opportunities rare), and potentially viability considerations in the current market climate. Many of the existing industrial estates are owned by the Council, resulting in fewer opportunities for developers to purchase land for redevelopment. However, this could provide direct opportunities for the Council (perhaps working in partnership with a developer) to either assemble wholesale redevelopment opportunities or undertake improvement works.
- 8.29 Better utilisation of the stock on these estates could be achieved either through gradual redevelopment of individual plots (e.g. replacing a large older unit with development of modern small units for which there is good demand, for example new office campus and industrial units at Woodingdean Business Park) or the sub-division of larger units. Based on experience elsewhere, qualitative improvements on the larger estates could also include the stripping and repainting of older industrial units, and making environmental, security and traffic management improvements through a Business Improvement District (BID) mechanism. Similar processes of gradual upgrading could be encouraged on larger industrial areas to ensure they can make a positive contribution to meeting some of Brighton & Hove’s future growth requirements.
- 8.30 There may also be the potential to explore different funding sources to enable small/medium firms to upgrade premises or develop new premises if the market does not deliver these improvements, either through gap funding assistance or de-risking through up-front finance. This could include a number of forms of direct Council/LEP 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. Such measures may be harder to fund in the current economic climate but could appear worthwhile as future actions.
- 8.31 Finally, it may be appropriate to explore opportunities to de-risk planning issues for certain types of development, in a way that is appropriate to the site context. This could include, for example, Local Development Orders, design codes, or other forms of planning brief to provide greater certainty on the types of development that will be supported by the Council.

## Other Policy Issues

### Constructing a delivery trajectory for employment sites

- 8.32 One of the key points arising from the earlier analysis is the need to identify a realistic delivery trajectory for employment sites (including both allocations and commitments), particularly in the case of future office space in Central Brighton where past delivery has been very limited. However, it is also an issue for industrial sites, where a quantitative requirement for additional supply has been identified and there are limited immediate new development opportunities on existing protected sites.
- 8.33 Accordingly, it is recommended that the Council should evidence how its portfolio of allocations and other development opportunities will support delivery of new space over the short, medium and long-term (structured broadly in five year periods). This accords with the approach set out in the former SEEPB guidance on employment land assessments which encouraged local authorities to demonstrate a five-year rolling supply of employment land. Where any gaps are identified, the Council will want to consider options for how this can be addressed (potentially as part of the City Plan Part Two). It is also important because the supporting text for Policy CP3 identifies that some flexibility may be applied on allocated sites subject to a number of tests, including where there is a demonstrable benefit in terms of early (re)development opportunities. Therefore, it is helpful for sites to be assessed on a consistent basis in order to determine at broadly what point in the Plan period they may become available, and how important any individual site is for meeting either office or industrial needs within any rolling five-year period.
- 8.34 In determining the likely timing and availability of land, this delivery trajectory should have regard to:
- a the planning status of sites (extant planning permission, allocation etc);
  - b development constraints/costs and known requirements for infrastructure;
  - c current developer/landowner aspirations; and
  - d market delivery and viability factors.
- 8.35 The assessment provides the opportunity to identify and map out the City Plan's 'when', 'whom' and 'how' employment space delivery actions for each site. In turn, it will also offer a basis to continually assess the potential role of a site in meeting employment land and other City Plan objectives (and, inter alia, the policy benefits that would accrue if earlier delivery of the site was encouraged). The trajectory should be linked to the annual monitoring process and periodically updated to ensure the rolling supply of employment land during the Plan period.

## Employment-led mixed use redevelopment sites

- 8.36 The Draft City Plan identifies a number of sites for employment-led mixed use redevelopment. The underlying rationale for this approach is reasonable given the context of competing demands on the City's limited supply of land, and the need to make more productive use of sites.
- 8.37 As it stands, the policy starting point for these sites is to achieve no net loss of employment floorspace. From the assessments contained in Section 5.0, it appears that the location, constraints or viability of development on some of these sites may pose risks to this objective being achieved. Furthermore, some of the sites considered were assessed as being less appropriate for accommodating larger-scale B-class employment activities and/or unlikely to have a realistic prospect of attracting significant new occupiers. Portland Road and Land North of Newtown Road are the largest and most accessible of the CP3.4 mixed-use sites, and therefore perhaps have the most potential to generate the critical mass needed to achieve any net gain in floorspace. The other sites may still be appropriate for smaller-scale employment uses, but more efficient design is likely to result in a net loss of space particularly when compared against older buildings (the majority of which are industrial). It is difficult in these circumstances to reconcile a 'no net loss' approach with the objective of securing positive development outcomes for those sites.
- 8.38 The policy's supporting text currently details the range of factors against which the Council will normally consider any proposals where net loss of employment floorspace is being proposed, for example site constraints, access and amenity, and well as qualitative factors such as the type and quality of replacement employment. This approach is helpful in providing a framework against which future development proposals on these sites can be assessed, but also providing some basis for these sites to continue to have a part B-class employment role. This more flexible, criteria-based approach would appear a reasonable way forward.

## Redundancy test for non-allocated sites

- 8.39 Policy CP3 of the Draft City Plan provides general protection for unallocated sites or premises in employment use unless it can be demonstrated that they are redundant and incapable of meeting modern B1, B2 and B8 needs. As noted in Section 5.0, a small sample of these types of sites has been reviewed through this study, and all were found to be providing an employment role at some level.
- 8.40 Sites of this type contribute to meeting the City's overall employment space requirements. However, there is often pressure to redevelop these sites for other uses, particularly residential. This has especially been the case with many older poorer quality industrial buildings in predominantly residential areas. In the context of the tight industrial market and quantitative shortfall described above, this poses a significant challenge. On this basis, the test of redundancy appears warranted, and the range of criteria (as outlined in the

Draft City Plan) to be assessed appears suitable for the purposes of making a balanced assessment on a case-by-case basis.

- 8.41 A relevant factor is that the provision of additional industrial supply would assist in the gradual process of consolidation of the City's smaller, poorer performing industrial sites into more modern and efficient sites more suited to modern business needs. This would potentially free up some of the City's often small and fragmented unallocated industrial legacy sites in unsuitable locations for other uses (such as residential) that better complement the surrounding area. Over time, this may change the basis upon which the redundancy test needs to be applied.
- 8.42 For offices, the quantitative balance is less tight, although there are significant delivery challenges for new office space. Accordingly, the redundancy test also appears appropriate and importantly the assessment should have regard to the role a particular site may have in terms of the City's overall strategy for office development noted above.

### Affordable space for small businesses

- 8.43 Although the City has reasonable existing provision of space geared towards small, start-up businesses (for example at the Brighton Media Centre and Knoll Business Centre), given the City's concentration of SME's (particularly within the high growth digital media sector) and strong links with the Universities, it is important that Brighton & Hove continues to provide this type of space if indigenous business growth is to be encouraged and retained within the City.
- 8.44 Market feedback identified a requirement for additional start-up office space, offering small units on flexible terms and crucially, at affordable rates. In order to meet this requirement, the Council should seek to maximise opportunities for delivery of small scale, managed and affordable work space through the seven key Development Areas (subject to viability), which provide the focus for the majority of the City's future employment development over the plan period.
- 8.45 Whilst re-development and intensification of the City's existing employment sites should be encouraged to allow sites to be used more efficiently and accommodate additional employment space, it will be important to re-provide any cheaper/affordable business units that currently occupy these sites either on-site or elsewhere within the City. This could involve delivery of new, purpose-built space and/or the refurbishment of older accommodation into affordable start-up space. Based on experience elsewhere, two approaches to providing such premises could be considered:
- 1 seek provision of small units within larger employment developments, residential or mixed use schemes; this could be achieved as part of the s106 obligations with the developer delivering the units for management by the Council or another operator. Caution will be needed during a period of market fragility to ensure this does not damage delivery of potentially valuable development; and

- 2 encouraging conversion/sub-division of older industrial space into a number of small, lower cost office units (e.g. a small business centre) which can provide a more cost effective option than provision of new bespoke space; if the market did not bring this forward, such a scheme could be instigated by the Council with a development partner or consortium. New England House represents a recent example of such a scheme, brought forward in partnership between the University of Sussex, Wired Sussex and the Council.

## Conclusions

- 8.46 The scenarios considered in the previous sections indicate the broad scale and type of growth arising from different approaches to modelling the City's future employment space needs. These reflect the indigenous needs arising within Brighton & Hove, and to some extent, demand from the wider sub-region in which the City operates. Both from the perspective of the NPPF, but also the City's own objectives, it would appear important that the City Plan aims to fully meet these needs if the City's economy is not to be unduly constrained. However, to ensure a flexible and responsive policy framework, it will be necessary to not just focus on meeting forecast quantitative requirements, but also to consider the opportunities and risks to the City's economy that flow from particular policies, including managing pressures from other uses.
- 8.47 In terms of future office needs, the identified quantitative requirement is of a similar order of magnitude to that currently identified in the Draft City Plan. Lack of high quality, modern accommodation in the recent past is reinforcing a view that Brighton is currently "punching below its weight" in office market terms. Future policy must therefore be underpinned by a clear strategy of what the market can deliver, the types of space required and the locations of strongest demand, with a clear focus on assembling a delivery trajectory for the Plan period, identifying a realistic delivery pipeline of employment sites over the short, medium and long-term. However, there is potential for a shortfall of office supply if all sites deliver below their current floorspace assumptions.
- 8.48 One of the key challenges the Council must seek to manage is how to encourage greater delivery of office space, particularly in Central Brighton, but also structuring supply in other parts of the City to respond to market opportunities. Upgrading and renewal of the City's existing stock of office accommodation will also be important to ensure that this space remains attractive to the market, while opportunities to deliver small scale, managed and affordable work space should be maximised in order to encourage and retain indigenous business growth within the City.
- 8.49 A modest positive requirement for industrial space has been identified, a conclusion that deviates from the earlier employment land studies and consequently very limited specific provision is currently provided in the Draft City Plan for additional industrial space. This quantitative requirement is supported by the qualitative feedback that the City is perceived as "full up" for

industrial activities. There are a number of potential options for how additional supply might be provided, which include:

- a increasing the industrial floorspace capacity across existing Development Areas identified for industrial uses;
- b delivering industrial floorspace within other Development Areas;
- c considering the scope to achieve a net gain in employment floorspace on employment-led mixed use redevelopment sites; and
- d not specifically identifying additional capacity for industrial space, instead assuming that these needs are met elsewhere.

8.50 In addition, the need to encourage upgrading and renewal of existing space should also be explored. It is also important that the City continues to provide a range of affordable workshop space for small high growth start-up businesses, through re-developing/converting existing sites and working with developers to provide small units within larger employment, residential or mixed use schemes.

8.51 Within the context of acute capacity constraints, difficulty in identifying any readily available 'new' sites, and in a situation whereby the City Plan Part One is unable to fully meet the identified needs of B class sectors in quantitative and qualitative terms, it will be important for the City Plan Part Two to give active consideration to how a portfolio of sites and development management policies can be put in place to maximise the prospects for meeting these needs. In doing so it can help position the City to accommodate future business growth and achieve its economic potential.

## 9.0 Overall Conclusions & Policy Recommendations

- 9.1 The following key conclusions can be drawn from this study on the adequacy of current employment land supply in Brighton & Hove and requirements for the period up to 2030.

### Economic Context

- 9.2 Brighton & Hove has recorded significant job growth over the last 15 years (16.8%), outperforming both regional and national trends and has proved relatively resilient through the recession. The proportion of B class jobs have remained largely constant over this period, with declining industrial employment offset by office job growth. Its key sectors of business services, education and retail have experienced significant employment growth over the last decade. At the same time, significant job losses were recorded in communications, banking & insurance and manufacturing.
- 9.3 The City's business base is dominated by SME's with high levels of business start-up and self employment. However, due to its relatively low representation of high value, knowledge intensive activity, Brighton & Hove's economy is characterised by below average productivity/GVA. The City has historically under-performed in attracting inward investment, in doing so losing out on an important source of economic growth.
- 9.4 Although Brighton & Hove's residents hold higher than average workforce skills and occupations, the City's labour market continues to face a number of challenges to maintain high economic activity and low unemployment. Significant levels of out-commuting results in stark contrasts between workplace and resident earnings, while deprivation remains entrenched in pockets of the City such as East Brighton, Hangleton and Moulsecoomb.
- 9.5 A range of ambitious local economic strategies and initiatives emphasise the need to attract and retain talent; develop an environment that supports the creation of higher level jobs, and make best use of land within the City to support sustainable, high growth employment. These strategies suggest that whilst Brighton & Hove has a solid base upon which to build a strong and prosperous economy, a step change is needed in order for the City to achieve its true economic potential.

### Brighton & Hove's Employment Space

- 9.6 Employment space in the City is evenly split between industrial and office uses. Brighton & Hove has the largest supply of employment space of all neighbouring authorities, particularly in terms of commercial office space reflecting the City's role as a sub-regional centre.
- 9.7 The City has seen moderate levels of new development over the past decade, the majority for B1a/office uses. At the same time, it has been losing B class

space – largely industrial – placing increasing pressure on remaining space to accommodate the City’s economic activity. The City now has a fairly ageing stock of employment space and a lack of modern business premises relative to other parts of the region. Overall vacancy of office space is at normal levels (although much lower for ‘Grade A’ space) and industrial vacancy is very low.

- 9.8 Brighton & Hove’s unique geographical constraints coupled with greater availability of industrial or office space in adjoining areas are likely to make it more difficult for the City to compete for new investment and relocations, or accommodate enquiries for employment space as they arise. There are some large employment developments underway in adjoining authorities for example at Newhaven, Shoreham Harbour and Burgess Hill. To varying degrees these may compete with Brighton & Hove, but also may offer some potential for accommodating demand that cannot currently be met within the City.

## Commercial Property Market

- 9.9 The City’s commercial property market is largely self-contained and localised, driven by SME’s such as digital and creative media firms looking to expand and/or upgrade. Enquiries for employment space are generally not received beyond Burgess Hill or Haywards Heath.
- 9.10 Demand for office space remains strong, particularly for Central Brighton and the area surrounding the station/Queen’s Road and for small units up to 5,000 sq.ft. However, very little new office development in the past 20 years has resulted in a shortage of ‘Grade A’ office space in the City, with the majority of current stock comprising refurbished older buildings. Coupled with funding/viability issues in the current market, this lack of supply could constrain the level of future office based activity that the City has the potential to sustain.
- 9.11 Despite not being perceived as an important industrial location, demand for industrial space in the City also remains relatively high, again with demand largely driven by local SMEs. However, existing provision of industrial space is limited, often in unsuitable locations, with very little new development completed in the last 10 years. Market feedback indicates that the City requires more modern, flexible and small scale industrial space to accommodate enquiries that currently cannot be met.

## Current Employment Sites

- 9.12 Overall, the site assessments indicate that the City contains a reasonable range of employment sites of differing quality and type. The majority of sites assessed were predominantly within B1a and B1c uses with some B2 and smaller B8 uses also available. The assessment process has identified 11 (22%) high scoring good quality sites, 33 (66%) average quality sites and seven (12%) sites of poorer quality. It should be noted that the broad ‘good’, ‘average’ and ‘poor’ groupings are purely indicative to provide an estimation of the quality of supply of sites.

- 9.13 The market attractiveness of sites was generally high, reflected by low vacancy rates. Even though a number of sites scored less well due to factors such as physical appearance or local access, they all appear to be meeting employment needs at some level. South Portslade, for example, had very low vacancy levels despite the units being of relatively poor quality demonstrating its functional importance within the area. Sites such as Woodingdean Business Park achieved higher 'market attractiveness' scores due to better quality premises and higher profiles compared to some older sites. Accordingly, no sites were specifically identified as candidates for release to other uses.

## Future Requirements for B-Class Space

- 9.14 Three scenarios of future employment space requirements have been considered within this study, based on a number of approaches which reflect economic growth, development trends and potential housing supply factors. Two of these reflect assumptions of higher future economic growth in Brighton & Hove than the City has achieved in the recent past.
- 9.15 The overall space requirements related to these different scenarios range from 127,220m<sup>2</sup> to 155,670m<sup>2</sup> of all types of employment space up to 2030, implying a need for between 18.8 ha and 24.4 ha of employment land.
- 9.16 In terms of total floorspace requirements, the range of scenarios tested for the period 2010-2030 all exceed the requirement identified in the 2006/09 employment land studies. However, with the exception of the labour supply scenario, the requirements for office space are broadly comparable while this study indicates a positive requirement for industrial space over the plan period, compared with a negative requirement identified by the 2006/09 studies.
- 9.17 Whilst it is difficult to select the most likely option from these alternative growth pictures, the office requirement based on job growth appears to best reflect the Council's economic vision for the City, and is comparable to the requirement identified by the previous 2006/09 studies and the subsequent target for new office space set out in the Draft City Plan.
- 9.18 Although the Draft City Plan does not make any specific provision for industrial needs, all scenarios tested in this study identify a positive requirement for industrial space to 2030. In order to meet this need, the job growth and past take-up approaches are considered the more accurate guide for planning purposes.

## Demand/Supply Balance

- 9.19 In quantitative terms, Brighton & Hove has more than enough office floorspace to meet future needs up to 2030, under various scenarios of future growth. However, depending upon the outcome of public consultation on the Draft City Plan and any subsequent reduction in available supply, this may result in a shortfall of office floorspace under one or more of the scenarios to 2030.

- 9.20 The City's office market suffers from a range of qualitative factors such as high vacancy of older, edge of centre office premises and lack of City centre modern, Grade A space that occupiers increasingly demand. Therefore, any new office space allocated by the new City Plan should be located in areas of the City that continue to be in demand from occupiers (particularly in the growing digital and creative media sector) and that can provide longer term, viable development opportunities, such as Brighton City Centre/Hove Station.
- 9.21 The supply of industrial space identified in the Draft City Plan is insufficient to meet future needs under all future development scenarios. Whilst Brighton & Hove is not perceived as an important industrial location, demand for premises remains strong and all three scenarios indicate a continuing role for the City's industrial economy. Potential industrial supply/allocations identified in the Draft City Plan could reduce significantly following a period of public consultation, whereby worsening the existing shortfall.
- 9.22 The City's existing stock of industrial premises are also in need of modernisation and upgrading, although continued high occupancy and low vacancy prevent the churn that the market need to remain competitive and attractive to firms.

## Policy & Delivery Implications

- 9.23 The range of scenarios considered in this study indicates the broad scale and type of growth arising from different approaches to modelling the City's future employment space needs. These reflect the indigenous needs arising within Brighton & Hove, and to some extent, demand from the wider sub-region in which the City operates. It would appear important that the City Plan aims to fully meet these needs if the City's economy is not to be unduly constrained. However, to ensure a flexible and responsive policy framework, it will be necessary to not just focus on meeting forecast quantitative requirements, but also to consider the opportunities and risks to the City's economy that flow from particular policies, including managing pressures from other uses.
- 9.24 In terms of meeting office needs, future policy must be underpinned by a clear strategy driven by what the market can deliver, the types of space required and the locations of strongest demand, with a clear focus on assembling a delivery trajectory for the Plan period which identifies a realistic delivery pipeline of employment sites over the short, medium and long-term. A key challenge that the Council must seek to manage is how to encourage greater delivery of office space, particularly in Central Brighton, but also structuring supply in other parts of the City to respond to market opportunities. Upgrading and renewal of the City's existing stock of office accommodation will also be important to ensure that this space remains attractive to the market, while opportunities to deliver small scale, managed and affordable work space should be maximised in order to encourage and retain indigenous business growth within the City.
- 9.25 This study identifies a modest positive requirement for industrial space which deviates from the earlier employment land studies and consequently very

limited specific provision is currently provided in the Draft City Plan for additional industrial space. A number of potential options are highlighted for how additional supply might be provided, which include increasing the industrial floorspace capacity across existing Development Areas identified for industrial uses; delivering industrial floorspace within other Development Areas; considering the scope to achieve a net gain in employment floorspace on employment-led mixed use redevelopment sites; and not specifically identifying additional capacity for industrial space, instead assuming that these needs are met elsewhere. The need to encourage upgrading and renewal of existing space should also be explored, alongside the provision of a range of affordable workshop space for small, high growth start-up businesses, through re-developing/converting existing sites and working with developers to provide small units within larger employment, residential or mixed use schemes.

- 9.26 Within the context of acute capacity constraints, difficulty in identifying any readily available 'new' sites, and in a situation whereby the City Plan Part One is unable to fully meet the identified needs of B class sectors in quantitative and qualitative terms, it will be important for the City Plan Part Two to give consideration to how these needs can be met to ensure that the City can accommodate future business growth and achieve its economic potential.



## Appendix 1 List of Consultees

### Individual Consultees

Phil Graves	Graves Jenkins
Bill Shipley	Cluttons LLP
George Dobson	Stiles Harold Williams
Andrew Halfacree	Flude Commercial
Simon Forrest	Oakley Commercial
Andy Lambor	Matsim Properties

### Business Consultees

Ecoysys  
Epic Group plc  
Infinity Foods  
Plug-in Media  
Relentless Software  
Sea Roc

### Workshop Attendees

Andrew Goodall	Brunswick Developments Group Plc
Andrew Halfacree	Flude Commercial
Andy Lambor	Matsim Properties
Craig Ritchie	Matsim Properties
Barry Hough	Parsons Son & Basley Commercial
Bill Shipley	Cluttons LLP
Cath Prenton	Clifford Dann LLP
Colin Brace	Newtown Road Adventures/Boho Green
Colin Henderson	City College
Don Elwick	Brighton Media Centre
Ed Allison-Wright	Centurion Group
Freddy Franchi	French Coq & Co Ltd
Gavin Stewart	Brighton BID Manager
Helen Walker	Sustainable Communities
Huw James	DMH Stallard (Motoring & Leisure Services Ltd)
Ian Robertson	Roberston Consulting
Jaine Huntley	Adur District Council (Shoreham Harbour Project)
James Belbin	Hargreaves
Jane Fuller	Adur District Council (Shoreham Harbour Project)
Les Robinson	Hopegar Properties
Martin Carpenter	Enplan
Nick Kay	St Modwen
Paul Burgess	Lewis and Co Planning
Peter Davies	Shoreham Port Authority
Phil Jones	Wired Sussex
Richard Andrew	Hargreaves

Robert Paine	Graves Jenkins
Scott Marshall	This is Regeneration Ltd
Tony Mernagh	Brighton & Hove Economic Partnership
Andy Glover	Brighton & Hove City Council
Cheryl Finella	Brighton & Hove City Council
Hamish Walke	Brighton & Hove City Council
Helen Gregory	Brighton & Hove City Council
Martin Randall	Brighton & Hove City Council
Rob Fraser	Brighton & Hove City Council
Ciaran Gunne-Jones	Nathaniel Lichfield & Partners
Lucie Edwards	Nathaniel Lichfield & Partners
Matthew Spry	Nathaniel Lichfield & Partners

## Appendix 2      Workshop Notes

Summary of views expressed by participants at the Planning for Business Needs in Brighton & Hove Workshop (held 12<sup>th</sup> October 2012)

### **1. What should be the future economic role of Brighton & Hove?**

- The City should seek to maintain its diverse economy, build on existing strengths (such as SME's, creative industries, digital media businesses etc) and provide suitable accommodation to meet the needs arising from this
- In particular, support and maintain the City's strong digital media sector which will continue to grow. These firms tend to be micro in size and have the potential to grow significantly. In a digital and IT world, place becomes even more important and it is important that the City centre retains its appeal to these firms
- A document concentrating on the City alone would not be realistic - need to be consistent with other authorities' plans and be clear about the role of the City in the wider economic / market context
- Brighton & Hove generally viewed as having improved / been a successful economy over last twenty years.
- In future, the City/Council needs to be led by the market – securing/accepting money that is available for funding development recognising that other development will follow behind it. The City should be ready to react quickly to enable development to happen (and may not necessarily be the type of development sought by planning policy).
- View that larger firms may relocate out of Brighton & Hove for reasons unconnected with the City. The City should play to its strengths and not necessarily be too worried about this. For instance, Crawley has been successful in gaining development around Gatwick Airport.
- Need to ensure that City is positioned to cater for indigenous growth but also continued role for inward investment (see Inward Investment Strategy) in sectors where the City has existing strengths or knowledge-based industries that complement existing activities.
- Strong views that Brighton & Hove should not simply become a 'dormitory town' – has worked hard to diversify and expand economic base, and this should be supported in the future.
- View that Brighton & Hove needs to be careful to avoid complacency in terms of its attractiveness to business.

### **2. Which scenario of future needs should BHCC plan for? Should the policy emphasis be on reducing, achieving or exceeding past trend levels of growth?**

- The City should at least plan to achieve levels of growth seen in the past – getting the balance right between being aspirational enough and being realistic about availability of space to accommodate this growth.
- Suggest that given the current economic uncertainty, the City should plan to achieve same level of development over the next 10 years, but then aim to exceed past levels over the subsequent 10 years.
- In the future, the City should be focusing on creating better quality, high value jobs and these will come from office based activities rather than industrial – which shouldn't be the focus particularly as they are more land intensive.
- Important to identify where the key pressure for development is coming from. We should be catering for demand, not constraining development through policy requirements. The market/funders will tell the Council what they want and the Council should be ready to respond. Some concern however, that being too relaxed about change of use might lead to more vulnerable and lower value industrial uses being squeezed out of the City, and some of these activities may be related to the very sectors that the Council is seeking to attract (e.g. environmental technologies).
- In terms of the labour supply scenario, we should be aiming to reduce commuting levels and this requires better mixes of uses. The City should also allow for the trend for migration of SME's into the City especially environmental, digital and research sectors.
- Critical issue is the recession and, in particular, the lack of funding for developments that will only achieve short term leases.
- Employment space needs are changing - office occupiers are increasingly using hot desking, reducing their requirements for desk space by up to two thirds. They are also requiring flexible lettings with smaller footplates. Now unlikely to find one occupier taking up a complete vacant office.

### **3. Does Brighton & Hove have an adequate portfolio of sites for industrial and office uses? If not, what else is needed?**

- View that there is a shortage of industrial sites, and a lack of good quality, available space. Medium sized purpose built units for mixed B class uses are fairly common in places such as Worthing and Chichester but not in Brighton and Hove. A notable exception is Woodingdean Business Park which has worked very well, is occupied and has achieved high values. Self building schemes, such as Reflex Nutrition Drinks have also been successful. Concern that if industrial floorspace availability becomes too low, all those jobs will move elsewhere.

- Existing portfolio of office sites is too weighted towards lower quality space – majority of vacant space in the City is Grade B and requires upgrading to BREEAM excellent standard through refurbishment. Concern that lack of development, for instance of Grade A office floorspace, is due to landowners holding on to sites whilst seeking to achieve more profitable residential development. It was also considered that although SME's have an appetite for Grade A quality space, they are not always willing to pay the rents associated with this and/or lack the strength of covenants necessary to underpin pre-letting of development. Refurbishments of office space are having some success.
- Given that there is an existing reasonably balanced provision over the wider functional economic area, the study should consider the portfolio of employment sites over this wider area.

#### **4. Are the Development Area strategic allocations suitable/appropriate to support potential employment development in the City?**

- View that the area around Hove Station (DA6) could provide realistic alternative for digital and creative media companies – transport connections are good and there is a small but growing community there already. New England Quarter would also be a potentially suitable location for these firms.
- Question over whether Hove station is an attractive location for offices – with Brighton City Centre becoming full or not providing Grade A space, Hove could become a very important office centre.
- The Study needs to focus on the City Centre. Occupiers require very easy access to the train station, London and Gatwick. Generally a ten minute walk to the station is the maximum that office occupiers will accept.
- Except in the form of a bespoke business park environment, out of centre locations were believed to be less attractive to office occupiers due to the lack of facilities/amenities for office workers.
- Generally accepted that Toads Hole Valley is underused and should be considered for future development, but to get funding development will need to be pre-let.
- View that Toad's Hole Valley would be an unsuitable location for digital and creative media firms but potentially suitable for industrial uses / out of town office (mixed views about whether the City could sustain both City Centre and out-of-town markets at the same time – would need to consider type of product and phasing carefully).
- Some support for Toads Hole Valley and incubation space / Sussex Innovation Centre.
- Shoreham Harbour is the only obvious site for industrial development, but concerns over how accessible this is.

- Some views that Hove town centre could perform a greater role for offices building on existing range of smaller businesses that have moved into this area.
- Identified a number of issues with the DA's – many have remained empty for many years (suggesting underlying problem/market perception issues), and most owned by the Council.
- Circus Street site will probably work as it is being developed in partnership with the University of Brighton.
- Need to get rid of red line boundaries around development sites and take a more flexible approach to employment sites, debate about how to secure overall employment space in long term whilst providing flexibility in short term.

#### **5. If so, what can the Council do to enhance prospects for delivery?**

- Policies outside of Development Areas are too rigid, at the moment investors are put off by the difficulty they perceive in terms of getting approval etc. For many years the City Council have maintained their office protection policy, and this has resulted in the vacant office space seen today.
- A more flexible mixed use approach to development is needed, accepting market demands, being creative with planning policies and allowing the incorporation of uses such as residential or student housing which may help to bring some sites forward. Some views that Council should take a firm stance on 'no go' employment sites to be protected (but commit to reviewing these over the plan period) and then be more flexible on other sites.
- Perhaps should focus on lower cost of entry accommodation as a way to meet the needs of SMEs/TNTs, before moving into more expensive accommodation – funding for new space needs a guarantee of typically 15 year lease.
- Scope to use seafront sites more effectively, for example by maximising housing at King Alfred, Odeon (Kingswest) and Black Rock to benefit from seafront views, maximise capital receipt and use to bring forward leisure/employment sites elsewhere.
- Given that the Council own many of the industrial sites, they could sell them to make them more attractive to prospective developers; maybe package sites together to make better use of Council-owned sites.
- Improved public transport is critical - it is important to extend the catchment of the key City Centre area with very easy access (10 minutes walk) to the train station, considering trams, buses and park and ride.
- Similarly, maintaining public realm and quality of the City centre is important, e.g. Station Gateway improvements

- The Council should use its role to spread information around the business community. This role can help facilitate development by bringing developers, agents, banks etc together and helping to identify market needs / demands.
- Use of PR to spread news of successes, which will encourage further development (for example the successful bid for £3m from LEP which was needed to fund the gap in bringing forward office space at Block J - to be used by Sussex Innovation Centre).
- Need to recognise the importance of retail, leisure and tourism as employment generators - may not be B use classes, but still provide valuable jobs (for example change of use of the old Legal and General Office building on Davigdor Road, Hove to private hospital which has made the offices in that area (e.g. Spitfire House) attractive again, this time for users associated with healthcare sector).
- The Council must stay in close contact with key employers that are valuable to the City.

#### **6. What other factors could support future delivery of employment space in Brighton & Hove?**

- The Council could consider fast tracking planning applications, not just big schemes like Amex but proposals from SME's too.
- Providing 'account managers' for potential developers to lead them through the whole planning process.
- Student housing is in demand from the market at present. There is huge demand / capacity in the City and Brighton and Hove is already behind national trends. Allowing development of some sites may help to trigger other development. For example, could it be used to fund refurbishment of office accommodation or to enable new office accommodation?



## Appendix 3      Employment Space in Adjoining Areas

### Lewes

There are around 30,900 jobs in Lewes with key employment sectors including public administration, education and health, which together employ about 38% of people. The emerging Core Strategy is critical of the current supply of employment premises in the district noting that they are ageing and do not meet modern business requirements. The Core Strategy also states that employment land is under pressure from higher-value competing land uses particularly residential and retail.

The future strategy for employment land is set out within the emerging Core Strategy and the Employment Land and Economic Land Assessment for the District. The Core Strategy sets out the aim to identify where there is a lack of good quality modern business premises and smaller units therefore creating the opportunity to supply them in order to support growth and retention of other local business. Lewes aims, within the Core Strategy, to provide 50,000 sq.m to 64,000 sq.m of employment floorspace between the period of 2010 and 2026. Of this between 30,000 sq.m and 40,000 sq.m of floorspace will be provided for industrial uses while between 20,000 sq.m and 24,000 sq.m will be office space.

The emerging Core Strategy follows the strategy which is put forward by the Employment Land and Economic Land Assessment and identifies that the majority of employment land commitments will be in Newhaven and Lewes town, where there is currently the most significant short fall. The EELA recommended that a 1-1.5 hectare industrial site in or near to Lewes town should be created along with an additional 1-1.25 hectares of office sites in or around the town. The EELA has suggested this amount of space in order to ensure that Lewes reaches its economic potential.

According to the 2011 Annual Monitoring Report, current employment floorspace is shrinking and in 2011 slightly more employment space was lost to residential uses than in previous years. This was particularly the case for the office market (B1a) which decreased by 825 sq.m during the year. However, there was an increase by 851 sq.m of B2 space while Mixed B use class saw the largest increase in floorspace of 1,488 sq.m.

Master planning is currently underway at Newhaven Port to create a strategic framework from which the port will develop over the next 20 to 30 years. A key component of this emerging Masterplan is to invest in infrastructure to establish a clean technology and renewable energy business cluster, building on the success of existing local businesses and the current opportunities in offshore wind. It is unclear at this stage how this vision will translate into employment space requirements, however the site's owners believe that the

regeneration scheme has the potential to attract up to 300 new jobs to the area over the next 5 to 10 years.

## Mid Sussex

Mid Sussex is a large rural district to the north west of Brighton & Hove and records a total of 605,000 sq.m of commercial floorspace over 80% of which is concentrated in the Districts' three main towns of Burgess Hill (36%), East Grinstead (27%) and Haywards Heath. Within the District there are around 55,000 employees with around 45% of these commuting outside of the district to work.

Haywards Heath functions as a sizeable office centre, in part due to its good rail connectivity. Vacancy is currently above average, although this is perceived to be due to relatively poor quality space rather than a lack of demand in this location. The proposed Station Quarter redevelopment scheme, which includes approximately 10,000 m<sup>2</sup> of new office space, is expected to go some way towards meeting this 'gap' in the market, although no planning application has yet been submitted. In contrast, East Grinstead functions as a secondary office centre with poorer transport links, and due to its location at the northern edge of the District, is not likely to be a competing location for Lewes District.

Burgess Hill, however, lies close to the Lewes District boundary and is a large industrial location with the Victoria Business Park the principal industrial estate. The town has successfully attracted industrial occupiers from Brighton and the district's Employment Land Review notes particular potential for further growth in high-skilled manufacturing. However, beyond existing planning commitments, there is no land remaining here for development.

The draft District Plan is looking to reduce the number of people leaving the district for work by seeking to create more opportunities for people to live and work within Mid Sussex. To achieve this level of economic growth the total number of additional jobs required within the district over the plan period is estimated to be 7,600. The majority of these will be created by the proposal for a major allocation of 20-30 ha at Burgess Hill aimed at accommodating a science park/high technology industry. The draft District Plan also encourages incorporating employment provision within large scale housing development as part of a mixed use development where it is appropriate and allowing new small-scale economic development in the countryside.

According to the Annual Monitoring Report 2010, between April 2006 - April 2010 48,953 sq.m of class B floorspace was completed within the District. Of this 28,000 sqm was for office use while 15,000 sq.m was industrial. Within this period the majority of floorspace was completed in 2008-9 where 28,197 sq.m was created. During the period 2009-2010 there were a total of 18 completions of employment use schemes. This created a total of 6307 sqm (net) floorspace. This is considerable drop from the 2008-2009 where there was 32,594 sq.m created. However, there is a total of 95,632 sq.m (net) of employment floorspace committed for development within the District as of March 2010 with a site area totalling 28.30 hectares.

The Employment Land Review has recommended that, in addition to existing commitments, 1.7 ha of land for B1(a) office development should be identified at Haywards Heath and 5-8 ha of high quality land for industrial and warehouse development (B1(c), B2 and B8) should be identified in Burgess Hill to meet demand over the 2006-26 plan period, although these recommendations are yet to be reflected in the draft Core Strategy.

## Horsham

Horsham District has a total of 756,000 sqm of commercial floorspace in B-class uses according to the Employment Land Review 2010. Around 65% of this space is concentrated in Horsham and a number of surrounding settlements (Southwater, Broadbridge Heath, Slinfold and Warnham). 13% is in Pulborough/ Storrington and surrounding areas; 11% in Henfield/ Partridge Green; and 9% in Billingshurst. The Review estimates that Horsham Town Centre contains 266,000 sq.m of commercial floorspace the majority of which is B1a office space. However, vacancy levels for office space within the town centre are relatively high at around 12% and there is an oversupply of large floor plate office units.

According to the Employment Land Review, the District accommodated approximately 8.4ha (gross) and 4.3 ha (net) of land with planning consent for employment development in 2010. If this was delivered it would create 14,082 sq.m net of employment floorspace, the majority for class B1 use. Analysis of economic forecasts in the Review indicates that employment growth over the twenty year plan period to 2026 in Horsham District is expected to be somewhat lower than in the recent past, with growth of between 4.1 – 8.3%. If this is correct it could create a surplus of between 8 - 13 hectares of employment land in the District, taking account of the potential of existing sites.

The Core Strategy is currently in the process of being replaced by the Horsham District Planning Framework. However, there is currently no indication on how long this process will take and what any of the targets could be within the documents. Currently, the Core Strategy identifies a target of 210,000 sq.m of employment floorspace which was to be delivered by the end of the plan period of 2018. According to the Annual Monitoring Report 2011 only 16,433 sq.m of this is still required with 5,777 sq.m being created in 2010-2011.

The Employment Land Review recommends that the Council consider allocating additional land in order to enhance provision of high quality modern business park floorspace in the north of the District, in order to provide the potential for expansion and attraction of higher value added companies and to support economic growth in the key sectors identified, including pharmaceuticals and higher value-added manufacturing. This includes the allocation of 6 hectares of B1/B2 employment land West of Southwater and North of Horsham; 2 hectares of land as an extension to Wiston Business Park; and 4 hectares of employment land at Billingshurst for largely office uses.

## Adur

Adur's economic strengths lie within the wholesale, retail, health, manufacturing and professional, scientific and technical sectors. Relative to the South East it also has a strong concentration of employment in mining and quarrying due to the activities at Shoreham Harbour.

The District's 2011 employment land review identifies 351,000 sq.m of employment floorspace with the district, of which 41% is industrial floorspace, 25% warehouse floorspace and just 6% office floorspace. The economy is closely interrelated to those of Worthing and Brighton and Hove, reflected by commuting patterns which show that 82% of Adur's residents work in Adur, Brighton & Hove or Worthing. The ELR identifies a current need for additional employment space with around 8,000 more residents in work than there are jobs.

According to the 2011 Annual Monitoring Report, Adur has a number of well-established business areas, including Lancing Business Park, Dolphin Road, Shoreham Harbour and Shoreham Airport, but there is a scarcity of readily available land for new economic development. The emerging Local Plan seeks to maximise the creation of further employment floorspace within the district in order to meet its needs for an identified 3,700 additional jobs up to 2031, reduce net out-commuting from the district, provide higher value-added employment and supporting the image and profile of the district as a business location.

In order to achieve this, the ELR has identified three potential sites for employment growth at Shoreham Harbour, Shoreham Airport and New Monks Farm. The type of employment floorspace provided on each site would vary according to the character and nature of the site. In theory this will create up to 66,000 square metres of employment land in Adur up to the 2028. The split of this between sites will be up to 30,000sqm at Shoreham Airport, up to 10,000 sq.m at New Monks Farm and up to 26,000 sq.m within Shoreham Harbour Regeneration Area.

The 2011 Annual Monitoring report shows that there is currently a lack of new employment floorspace being created in the District. The 2006 Adur Employment Land Study recommended that at least 4,000 sq.m (net) of employment floorspace should be provided annually in order to support economic growth. In 2011 there was only an 813 sq.m net increase in employment floorspace was created. This was fully supplied on brownfield sites. Based on the existing Adur Local Plan (1996) and sites for which planning permission has been granted for employment uses, a total of 5.13 hectares of land remains available for employment uses.

Shoreham Harbour represents the most significant long term regeneration project in the district, and is currently the subject of wide spread consultation and Master Planning. It builds on a long standing aspiration to maximise the potential of Shoreham Harbour and to revitalise the area for the benefit of local communities and the wider sub-region. The mixed-use development is expected

to improve employment opportunities in the area by bringing forward a range of business premises for both industrial uses that have traditionally occupied the area as well as higher-value sectors.



## **Appendix 4      Site Assessments**



Site Name	Gas Works Site	Reference	D1
			
Total site area (ha)	2.3	Current uses	B1c/B8
Undeveloped land (ha)	1.0	Sequential status	Out of centre
Site status	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	Density	Low

Criteria	Comment	Score (out of 5)
Strategic access	Located directly off the A259 providing good access and good quality roads however located over 5km from the primary road into Brighton, the A27.	4
Local accessibility(local road access and public transport)	Access via Marine Way and Arundel Street. Reasonable quality road junction but some slight congestion during peak times. Poorly surfaced access with lots of on street parking. In close proximity to bus routes offering services including to Brighton city centre.	4
Proximity to urban areas and access to labour & services	Within the urban area. Located close to residential properties with reasonable access to some local services on the parade.	3
Compatibility of adjoining uses	Self-contained site, surrounded by main roads; within wider residential environment with houses located immediately to the west and a block of flats to the east.	4
Development and environmental constraints	Large site, level and regular in shape; existing gas holders on site and therefore contamination and site remediation constraints exist.	2
Market attractiveness	High profile site located along the sea front, but currently under-utilised. Existing uses comprise low grade garages/car repair workshops and open storage. Close to Bell Tower industrial estate which is a well-used small-scale industrial site.	2
Planning factors	Split allocation in 2005 Local Plan for employment (EM1) and housing (HO1) on southern portion of site. Draft City Plan allocation under DA2 (Brighton Marina, Gas Works and Black Rock) for 4,000 sq.m of employment floorspace, 85 residential units and some ancillary retail development.	
Barriers to delivery	Costs associated with removal of gas holders and remediation of site. Likely requirement for upgraded local site access to support more intensive development.	
Potential uses	B1a/c reflecting proximity to existing residential areas and mixed-use allocation	
Timescale/availability	Southern portion of the site is cleared and could therefore come forward in the short to medium term. The northern part of the site requires removal of gas holders and remediation suggesting medium to long term prospect. Overall masterplan would be required to facilitate comprehensive mixed-use development of the site.	

**Total Score:** **19**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Preston Barracks and Brighton University (Mithras House and Watts/Cockcroft Site)</b>	<b>Reference</b>	<b>D2</b>
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<b>Total site area (ha)</b>	8.88	<b>Current uses</b>	Sui Generis/B1a/vacant
<b>Undeveloped land (ha)</b>	3.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Low/Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located directly off the A270 Lewes Road providing excellent access via dual carriageway roads, with easy access to A27.	4
Local accessibility(local road access and public transport)	Located directly adjacent to range of bus stops offering regular services and located next to Moulsecoomb railway station. Several road access points into site from A270, but constrained by busy junctions. Existing internal road network and large areas of parking within Brighton University site.	3
Proximity to urban areas and access to labour & services	Located within the urban area directly adjacent to residential areas and in close proximity to some local services.	4
Compatibility of adjoining uses	Situated in a residential area, but generally self-contained bounded by A270 running to the east and a railway line to the west.	4
Development and environmental constraints	Large site, but currently split into a number of component areas; Mithras House site lies on opposite side of A270 with poor pedestrian linkages to other parts of site. The site contains some steep sections and therefore the topography of the site would constrain future redevelopment. Part of the southern element of the site is split by the main road which may cause linkage problems, particularly for pedestrians.	3
Market attractiveness	Prominent site with good frontage along main road into City. University sites are well utilised and include mix of older and modern buildings; barracks site currently derelict. Position within city's academic corridor could be significant attractor for some types of business activities.	4
Planning factors	Various 2005 Local Plan designations relating to high-tech and office uses (EM2) mixed use (EM9) and site-specific policies (EM17, EM18). Draft City Plan allocation (DA3 Lewes Road) for mixed use employment-led development comprising new business school, 10,600 sq.m employment floorspace including Innovation Centre with student and residential accommodation and ancillary uses. Planning Brief for site approved in September 2011.	
Barriers to delivery	Fragmented ownership across the site and partnership approach to delivery of site; any redevelopment will need to take account of ongoing University activities on site.	
Potential uses	B1a/B1b (as part of mixed-use redevelopment)	
Timescale/availability	The former barracks to the south could be redeveloped immediately whilst the remainder of the site remains a medium/long term opportunity subject to the operational needs of the University.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Woollards Field South</b>	<b>Reference</b>	<b>D3</b>
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<b>Total site area (ha)</b>	2.68	<b>Current uses</b>	Undeveloped
<b>Undeveloped land (ha)</b>	2.68	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	N/A

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located directly off the A270 Lewes Road and A27 providing excellent access and good quality roads.	5
Local accessibility (local road access and public transport)	New access required onto A27/A270, potential to be shared with new adjoining development. The secondary access would be via more constrained residential routes. Located within 300 metres of two bus stops (to the north east and south west) offering over 10 services around Brighton. In close proximity to Falmer railway station.	3
Proximity to urban areas and access to labour & services	The site is located on the edge of the urban area, within close proximity to a residential area. Limited local services in close proximity to site.	2
Compatibility of adjoining uses	A self-contained site confined by both main roads and a railway line. Construction of 'The Keep' archive centre for East Sussex County Council currently near completion on northern part of Woollards Field.	4
Development and environmental constraints	Slightly sloping site with thick vegetation currently on site but no obvious constraints.	4
Market attractiveness	High-profile site fronting the A27, although isolated from existing employment areas. Reported interest from South East Coast Ambulance Trust for development of Make Ready Centre.	4
Planning factors	2005 Local Plan designations relating to high-tech and office uses (EM2). Draft City Plan allocation (DA3 Lewes Road) refers to provision of 5,000 sq.m of B1 office space south of the archive centre.	
Barriers to delivery	Provision of a new access road onto the A27/A270, likely to be shared with adjoining development.	
Potential uses	B1a allocation, but could be suitable for B2/B8 uses subject to access.	
Timescale/availability	Undeveloped Greenfield land. The site has good potential for future employment development in the medium term subject to planning permission.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Falmer Released Land, Former Falmer High School</b>	<b>Reference</b>	<b>D4</b>
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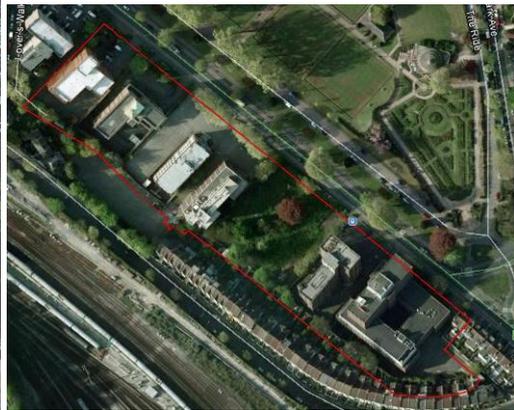
<b>Total site area (ha)</b>	1.92	<b>Current uses</b>	Car parking
<b>Undeveloped land (ha)</b>	0.4	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Draft City Plan 2012 allocation	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Existing access from south west through a residential area and minor roads resulting in poor access. Located within 2km of the A27 dual-carriageway providing very good access.	2
Local accessibility (local road access and public transport)	Constrained local road access via residential areas; Located within 200 metres of one bus stop offering over 10 local services around Brighton. Very constrained local access along a narrow residential road with congested layout and on-street parking. In close proximity to Falmer railway station.	3
Proximity to urban areas and access to labour & services	The site is located out of the urban area with no apparent local services available in close proximity.	2
Compatibility of adjoining uses	A school is located directly adjacent to the site with a residential area located to the west. Relatively self-contained site behind a thick line of trees and vegetation supported by a railway line running along the eastern boundary.	4
Development and environmental constraints	Access is poor along Lucraft Road which would need resolving prior to any potential development scheme. The site slopes relatively steeply from south east to north west but no other obvious constraints.	2
Market attractiveness	Vacant land with potential for redevelopment however located in a low-profile area with access constraints.	3
Planning factors	Draft City Plan allocation (DA3 Lewes Road) for range of uses including housing, student accommodation, education and B1 office uses, with car parking for American Express Community Stadium.	
Barriers to delivery	Cleared site, no obvious barriers to delivery	
Potential uses	B1a	
Timescale/availability	Cleared site, available for development in short term.	

**Total Score:** **16**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>125-163 Preston Road</b>	<b>Reference</b>	<b>D5</b>
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<b>Total site area (ha)</b>	2.02	<b>Current uses</b>	B1a
<b>Undeveloped land (ha)</b>	0.4	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Within 5 km of A27/A23 junction via Preston Road, and with range of other city centre routes in close proximity. Some congestion at peak times.	4
Local accessibility (local road access and public transport)	Directly adjacent to a bus stop offering a variety of services to destinations including, Patcham, Henfield and Crawley Bus Station. Preston Road railway station located within close proximity. Each plot along Preston Road has its own separate access and some dedicated off-street parking.	4
Proximity to urban areas and access to labour & services	Located within the urban area with some residential properties directly adjacent to the site boundary. Small local parade with services in close proximity.	4
Compatibility of adjoining uses	Preston Park directly opposite the site with residential uses directly to the south west. Large plots ensure separation and confinement of each site.	4
Development and environmental constraints	No obvious constraints.	4
Market attractiveness	High profile location with prominent frontage on main approach road into city; existing 1970s/80s units generally in average/good condition and some undergoing refurbishment. High levels of vacancy and isolated from other employment areas.	2
Planning factors	Provision is made for mixed use (office and residential) developments within the Draft City Plan (DA4 New England Quarter and London Road) retaining as a minimum across the development sites of 14,000 sq.m office floorspace and 460 residential units. A minimum office floorspace will be retained on each development site. Allocated within the Local Plan for high-tech and office uses (EM2).	
Barriers to delivery	Fragmented ownership may limit short term opportunities however no other obvious barriers.	
Potential uses	B1a only.	
Timescale/availability	One undeveloped plot directly adjacent to site with a derelict building. A number of others buildings seem vacant offering a short to medium term development opportunities. Scope for intensification and large -scale redevelopment.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Vantage Point, Elder Place</b>	<b>Reference</b>	<b>D6</b>
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<b>Total site area (ha)</b>	0.36	<b>Current uses</b>	Derelict Building
<b>Undeveloped land (ha)</b>	0.15	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Within 5 km of A27/A23 junction via Preston Road, and with range of other city centre routes in close proximity. Some congestion at peak times.	4
Local accessibility (local road access and public transport)	Located directly adjacent to one bus stop offering regular local services around Brighton and Hove. Located within close proximity to other bus stops offering wider services to Patcham, Crawley, Cambridge and Heathrow. Excellent local access directly off the A270. In close proximity to Brighton train station	4
Proximity to urban areas and access to labour & services	Located within the urban area on the edge of the city centre; good access to a large range of facilities and services.	4
Compatibility of adjoining uses	The site is self contained and compatible with surrounding town-centre urban uses.	5
Development and environmental constraints	The topography of the site is slightly sloping but could be easily overcome. No other constraints identified.	4
Market attractiveness	Current buildings vacant and in poor condition, but site located in close proximity to New England Quarter development area, New England House and Brighton station as well as city centre facilities.	3
Planning factors	2005 Local Plan designations relating to Town and district shopping centres (SR5). Within the Draft City Plan (DA4 New England Quarter and London Road) where provision is made for 1,000 sq.m net gain of B1a office space as part of wider mixed-use development. Within London Road Central SPD (adopted 2009).	
Barriers to delivery	Demolition of existing building; no other obvious barriers to delivery.	
Potential uses	B1a/mixed use	
Timescale/availability	Short-term; existing buildings vacant	

**Total Score:** **24**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Trade Warehousing (Longley Industrial Estate)</b>	<b>Reference</b>	<b>D7</b>
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<b>Total site area (ha)</b>	0.28	<b>Current uses</b>	B1c/trade counter
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Within 5 km of A27/A23 junction via Preston Road, and with range of other city centre routes in close proximity. Some congestion at peak times.	4
Local accessibility (local road access and public transport)	Located directly adjacent to one bus stop offering local services in and around Brighton and Hove. Located within 150 metres of other bus stops offering wider services to Patcham, Crawley, Cambridge and Heathrow. Excellent local access directly off the A270. In close proximity to Brighton train station.	4
Proximity to urban areas and access to labour & services	Located within the urban area on the edge of the city centre; good access to a large range of facilities and services.	4
Compatibility of adjoining uses	The site is fully compatible with adjoining uses and is relatively self-contained given the building fronts directly on the main road.	4
Development and environmental constraints	Site topography is slightly sloping however existing units demonstrate compatibility with the land form. The site would require full redevelopment to deliver new uses as limited ability to intensify other than to develop upwards.	4
Market attractiveness	High profile site with current units fully occupied and in reasonable condition.	4
Planning factors	2005 Local Plan designations relating to an Identified employment sites (industry and business) (EM1). Within the Draft City Plan, the site is allocated within the New England Quarter where provision is made for 20,000 sq m net additional B1a, B1 b floorspace and 165 residential units through the implementation of extant commitments for B1 floorspace and the mixed use development of a number of sites including Trade Warehousing (3000sq m). Within London Road Central SPD (adopted 2009).	
Barriers to delivery	No obvious barriers to delivery however the site would require relocation of existing occupiers and demolition of building to intensify the site.	
Potential uses	Currently suitable for B1c however has the potential for mixed use/B1a.	
Timescale/availability	Ownership depending. Medium to long term strategic option for employment development.	

**Total Score:** **24**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>New England House, New England Road</b>	<b>Reference</b>	<b>D8</b>
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<b>Total site area (ha)</b>	0.27	<b>Current uses</b>	B1a/workshops
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Identified in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Within 5 km of A27/A23 junction via Preston Road, and with range of other city centre routes in close proximity. Some congestion at peak times.	4
Local accessibility (local road access and public transport)	Located within 200 metres of three bus stops offering a wide range of local and regional services. Good unconstrained access however limited parking facilities available on site. In close proximity to Brighton train station.	4
Proximity to urban areas and access to labour & services	Located within the urban area on the edge of the city centre; good access to a large range of facilities and services.	4
Compatibility of adjoining uses	The site is compatible to its surrounding uses, particularly given the employment led redevelopment that has occurred in the area.	4
Development and environmental constraints	No space for development without large-scale redevelopment of the site. No obvious constraints exist.	4
Market attractiveness	1960s office building now owned by the City Council and 60% let as workshops and office units to small businesses (many in creative industries) with low rents and flexible terms. The site is very high profile given the frontage along the A270.	4
Planning factors	2005 Local Plan designations relating to an Identified employment sites (industry and business) (EM1). The site is safeguarded to be strengthened as a hub for creative industry and digital media through the Draft City Plan. The Council seeks to upgrade and refurbish the buildings and support proposals providing a range of workspaces. The policy also seeks to enable development around the buildings to improve the viability of the schemes Within London Road Central SPD (adopted 2009).	
Barriers to delivery	Site currently occupied; no other obvious barriers to delivery.	
Potential uses	B1a; Creative, Digital and Information Technology [CDIT] hub	
Timescale/availability	Some vacant floors to let. Potential refurbishment in the short term to improve the employment offer.	

**Total Score:** **24**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Richardson's Scrapyard and Brewers Paint Merchant Site</b>	<b>Reference</b>	<b>D9</b>
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<b>Total site area (ha)</b>	0.26	<b>Current uses</b>	B1c/B2
<b>Undeveloped land (ha)</b>	0.05	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Within 5 km of A27/A23 junction via Preston Road, and with range of other city centre routes in close proximity. Some congestion at peak times.	4
Local accessibility (local road access and public transport)	Located directly adjacent to one bus stop offering local services in and around Brighton and Hove. Located within 250 metres of other bus stops offering wider services to Patcham, Crawley, Cambridge and Heathrow. In close proximity to Brighton train station. The site is well located along good load roads providing easy access. Dedicated access road and limited car parking to rear of units.	4
Proximity to urban areas and access to labour & services	Located within the urban area on the edge of the city centre; good access to a large range of facilities and services.	4
Compatibility of adjoining uses	The site is located within an employment based area and is therefore compatible with the surrounding uses. Current uses include trade counter and metal recycling facility which would be more suited to an out-of-centre location.	3
Development and environmental constraints	No obvious constraints however the site would require full redevelopment to intensify the site. The site is located close to a busy road junction limited future access arrangements.	3
Market attractiveness	The site is a high profile site located on a busy junction. The current building is tatty and in need of repair. The site is however fully occupied and appears very busy. The industrial use is not overly compatible with this area but the site currently serves a good local purpose.	3
Planning factors	Within the Draft City Plan, the site is allocated within the New England Quarter where provision is made for 20,000 sq m net additional B1a, B1 b floorspace and 165 residential units through the implementation of extant commitments for B1 floorspace and the mixed use development of a number of sites including Richardson's Scrapyard and Brewers Paint Merchant Site, New England Street (3,000sq.m.). Within London Road Central SPD (adopted 2009).	
Barriers to delivery	Site currently occupied; no other obvious barriers to delivery.	
Potential uses	B1a/B1c	
Timescale/availability	Site currently occupied. Medium to long term option.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>GB Liners site, Blackman Street</b>	<b>Reference</b>	<b>D10</b>
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<b>Total site area (ha)</b>	0.08	<b>Current uses</b>	B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Protected through the Draft City Plan 2012	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	About 5 km from A27/A23 junction via Preston Road, and with range of other city centre routes in close proximity. Some congestion at peak times.	4
Local accessibility (local road access and public transport)	Restricted local road access via city centre routes, particularly for larger vehicles. On-street parking constrains vehicle turning space. Directly adjacent to one bus stop offering one local service (38 A) and 250 metres from two bus stops offering over 7 local services. In close proximity to Brighton train station.	3
Proximity to urban areas and access to labour & services	Located within the urban area on the edge of the city centre; good access to a large range of facilities and services.	4
Compatibility of adjoining uses	Range of surrounding uses including residential dwellings and retail units.	3
Development and environmental constraints	No obvious constraints however the site is very constrained by surrounding building form and there isn't much room to significantly intensify the use without full redevelopment and demolition of existing building.	4
Market attractiveness	Potentially a very attractive site however not as a B8 storage use class. The site is medium profile with an existing unit of reasonably good quality. Situated in a central location making the site more attractive.	4
Planning factors	Allocated within Draft City Plan as part of DA4 (New England Quarter and London Road) for B1a office uses reflecting extant planning permission. Within London Road Central SPD (adopted 2009).	
Barriers to delivery	Relocation of existing occupier.	
Potential uses	B1a/mixed use and potentially B1c	
Timescale/availability	Planning permission was granted in April 2009 for the demolition of the existing building however the current occupiers have not been able to find a suitable location to move to. Timescale subject to relocation of existing user.	

**Total Score:** **23**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Blackman Street Site (land adjacent to Britannia House)</b>	<b>Reference</b>	<b>D11</b>
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<b>Total site area (ha)</b>	0.11	<b>Current uses</b>	Vacant
<b>Undeveloped land (ha)</b>	0.11	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Identified in the Brighton and Hove Local Plan 2005	<b>Density</b>	N/A (vacant)

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Whilst situated in a town centre location, the site is located along the A270 which adjoins the A23. Good quality roads. May be congested in the peak times however not a significant constraint.	4
Local accessibility (local road access and public transport)	Located within 250 metres of a bus stop offering 3 local services including to Brighton station. The site is currently vacant brownfield land and therefore has no designated access points. The site is however well situated amongst local roads which are relatively unconstrained providing good future accessibility. In close proximity to Brighton train station.	3
Proximity to urban areas and access to labour & services	The site is with the urban area on the edge of the town centre. Whilst the site feels slightly isolated, the town centre is located within 5 minutes walk providing an excellent range of services.	4
Compatibility of adjoining uses	The site is relatively self-contained given the roads which surround the site. Also surrounded by some new residential development however generally very compatible with adjoining uses.	4
Development and environmental constraints	The site is vacant land and appears to have no obvious development constraints.	5
Market attractiveness	The vacant plot appears to be marketed but may have not been developed due to recent market downturn. The site is well located and a good site for development opportunities.	3
Planning factors	2005 Local Plan designations relating to a site identified for high-tech and office uses (EM2). Within the Draft City Plan, the site is allocated within the New England Quarter where provision is made for 20,000 sq m net additional B1a, B1 b floorspace and 165 residential units through the implementation of extant commitments for B1 floorspace and the mixed use development of a number of sites including Blackman Street Site (2,000 sq m).	
Barriers to delivery	No obvious barriers to delivery.	
Potential uses	B1a and potential mixed use reflecting the town centre location.	
Timescale/availability	Immediately available in the short term subject to planning	

**Total Score:** **23**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Cheapside (south between Blackman Street and Whitecross Street)</b>	<b>Reference</b>	<b>D12</b>
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<b>Total site area (ha)</b>	0.15	<b>Current uses</b>	B1a/B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Draft City Plan 2012	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Whilst situated in a City centre location, the site is located along the A270 which adjoins the A23. Good quality roads. May be congested in the peak times however not a significant constraint.	4
Local accessibility (local road access and public transport)	Located within 150 metres of a bus stop offering 3 local services including to Brighton station. The site is bound by roads to the north, east and west providing good local accessibility on relatively unconstrained roads. Peak periods may provide slight congestion and turn in problems however current facilities are reasonable. The site includes adequate parking provision.	3
Proximity to urban areas and access to labour & services	The site is with the urban area on the edge of the town centre. Whilst the site feels slightly isolated the town centre is located within 5 minutes walk providing an excellent range of services.	4
Compatibility of adjoining uses	The site is relatively self-contained given the road network which surrounds the site.	4
Development and environmental constraints	The site is located near on a corner plot which may provide difficult or constrained future access arrangements if the site was redeveloped. No other constraints identified.	4
Market attractiveness	This high profile site is located with an area that has seen a large amount of new development. Site comprises small office building (currently being marketed) and terrace of small industrial units. The site location is however attractive to redevelopment options as part of a wider scheme.	3
Planning factors	Within the Draft City Plan, the site is allocated within the New England Quarter where provision is made for 20,000 sq m net additional B1a, B1 b floorspace and 165 residential units through the implementation of extant commitments for B1 floorspace and the mixed use development of a number of sites including Cheapside (2,000 sqm).	
Barriers to delivery	Site requires comprehensive redevelopment.	
Potential uses	B1a	
Timescale/availability	Medium term – ownership depending.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Edward Street Quarter</b>	<b>Reference</b>	<b>D13</b>
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<b>Total site area (ha)</b>	1.93	<b>Current uses</b>	B1a
<b>Undeveloped land (ha)</b>	0.25	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located directly along Edward Street (dual carriageway), within 200 metres of the A23 providing good strategic access into the site. May be surrounded by slightly congested roads during peak times given its central location but this is not a significant issue.	4
Local accessibility (local road access and public transport)	Within 150 metres of 3 bus stops offering over ten local services. The roads surrounding the site are busy urban routes with some congestion at peak times. Good junctions and some allocated on-street parking ensure the internal layout is of reasonable quality.	3
Proximity to urban areas and access to labour & services	Located in the heart of the urban area within close proximity to local services.	5
Compatibility of adjoining uses	Some residential properties located to the east but the B1a use makes the site generally very compatible in this area. Whilst not completely self-contained, the site is tightly bound by roads on each side.	4
Development and environmental constraints	The site is tightly bound by the roads that surround it and the topography of the site is slightly sloping. However, no obvious significant constraints to report of.	4
Market attractiveness	Very attractive to the market given its high profile location. Some old, worn buildings remain on site but the profile of the site is supported by the new high-tech American Express building.	4
Planning factors	Site allocated as an employment-led redevelopment site (1.3 ha. Site including former Amex House and the Job Centre) with the Draft City Plan comprising demolition of the former Amex House and replacement with 30,000sqm of high quality office floorspace and 165 residential units. The site was also identified as a site for high-tech and office use with the Local Plan 2005. Edward Street Quarter SPD adopted in 2006.	
Barriers to delivery	No obvious barriers other than the relocation of existing occupiers may stall any redevelopment in the short term.	
Potential uses	B1a	
Timescale/availability	Dependent on relocation of existing occupiers but potential redevelopment of part of the site in the medium to long term.	

**Total Score:** 24

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Circus Street Site</b>	<b>Reference</b>	<b>D14</b>
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<b>Total site area (ha)</b>	0.75	<b>Current uses</b>	Vacant
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Strategic access is reasonable with the site situated directly onto the A23.	4
Local accessibility (local road access and public transport)	Approximately within 100 metres of a bus stop offering over 20 local services. Slightly constrained access onto Circus Street and close to busy urban routes. Reasonable internal layout with controlled on-street parking.	4
Proximity to urban areas and access to labour & services	Located in the urban area and on the edge of the city centre. Lots of local services available within a short walk.	5
Compatibility of adjoining uses	Kingswood flats located in an elevated position immediately to the east of the site; university buildings located directly to the south.	4
Development and environmental constraints	Height limit of potential development on the site given the neighbouring residential properties. Listed buildings (Grand Parade) located to the west.	3
Market attractiveness	Prime location and has the potential to be considered as a high profile site. The current buildings are all vacant and the site would therefore require full redevelopment but potentially a very attractive site for new business premises.	4
Planning factors	Designated as strategic allocation within the Draft City Plan offering a mixed use redevelopment of the former Fruit and Vegetable Market and Kingswood Street Car Park (0.75 ha) comprising 400-bed student accommodation, a minimum of 160 residential units, a minimum of 3200sqm office space, a Dance Studio and 3,800sqm of University floorspace and ancillary supporting uses. The site was also allocated within the Local Plan 2005 as a site identified for high-tech and office uses (EM2) and a mixed use sites with an element of housing (HO1).	
Barriers to delivery	No obvious barriers to delivery.	
Potential uses	B1a	
Timescale/availability	Medium term subject to development proposals	

**Total Score:** **24**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Freshfield Road Business Park</b>	<b>Reference</b>	<b>D15</b>
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<b>Total site area (ha)</b>	3.13	<b>Current uses</b>	B1c/B8/Sui Generis
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium/High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located in and around a predominantly residential area however surrounded by relatively good local b-roads. However, located within 0.5 km of the A259 to the south providing excellent good access.	4
Local accessibility (local road access and public transport)	Within 100 metres of 5 bus stops offering a large variety of local services. Reasonably good local road access via Freshfield Way. The internal spine road (Stevenson Road) is good and provides circular, flowing access through the site. Most plots have some element of parking but on-street parking is visible. The road is very busy during peak times with workmen visiting throughout the morning.	3
Proximity to urban areas and access to labour & services	Within the urban area and located near a residential quarter. Located close to local services.	4
Compatibility of adjoining uses	Self-contained site with residential to the north however at a higher elevation. The site is generally compatible with the surrounding uses but this is improved given the current 'trade counter' uses existing on site have limited impact on neighbouring residents.	4
Development and environmental constraints	No obvious constraints identified.	4
Market attractiveness	Reasonably modern and good quality units. Through our sampling, 1 vacant unit identified but the site is generally very active with branded and recognised trader counter occupiers.	4
Planning factors	Allocated within the Draft City Plan as a long term opportunity for comprehensive mixed use redevelopment of the Freshfield Road Business Park and Gala Bingo Hall (3.7 ha) comprising replacement of the existing employment floorspace in the form of a mix of B1 office/light industrial floorspace and B8 warehousing and provision of a minimum of 215 residential units. The site is also protected with the existing Local Plan as an identified employment site (industry and business).	
Barriers to delivery	None however the site is fully developed with no immediate opportunity to intensify. Different freehold/leasehold interests could may constrain future redevelopment.	
Potential uses	B1c	
Timescale/availability	Limited scope for intensification without full redevelopment. Nothing available except for the single vacant unit.	

**Total Score:** **23**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Conway Street Industrial Area</b>	<b>Reference</b>	<b>D16</b>
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<b>Total site area (ha)</b>	3.44	<b>Current uses</b>	B1/B8/Sui generis
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Located within 0.5 Km of the A270 providing good access along good quality roads.	4
Local accessibility (local road access and public transport)	Good internal road layout, although some congestion at peak times and on-street parking; directly adjacent to three bus stops offering up to five regular services. Within walking distance of Hove train station.	4
Proximity to urban areas and access to labour & services	Within the urban area and located within close proximity to range of local services	3
Compatibility of adjoining uses	Railway line to the north and large apartment blocks located to the south of the site along Ellen Street. Some residential properties located to the east and west of the site however the site is already relatively built up with large units already on site. Employment uses are compatible within this area.	4
Development and environmental constraints	No obvious constraints; site effectively divided into a series of plots by road grid but each is of a good size.	4
Market attractiveness	Some vacant and out-dated employment space in need of renewal; recently refurbished office space within 'The Agora' building is well occupied. Site is generally well located for small-scale employment uses within close proximity to Hove town centre.	3
Planning factors	Strategic allocation in the Draft City Plan for the comprehensive employment-led mixed use redevelopment to deliver more effective use of the under-used land and buildings, requiring the retention and provision of an additional 3,000m2 net gain in employment floorspace with a shift into high quality flexible office/business (B1) floorspace, the provision of 150 residential units and enhancements to the streetscape. The site is protected in the current Local Plan 2005 as an identified employment site (EM1 - industry and business).	
Barriers to delivery	Fragmented ownership may prevent sensible redevelopment of the site.	
Potential uses	Mixed use including B1a/c.	
Timescale/availability	Comprehensive redevelopment could maximise the efficient use of the land/sites in this area, possibly through phased development pending relocation of some existing occupiers and developer interest.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Toads Hole Valley East of the SNCI and south of the A27 embankment</b>	<b>Reference</b>	<b>D17</b>
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<b>Total site area (ha)</b>	36.98	<b>Current uses</b>	Privately owned open space
<b>Undeveloped land (ha)</b>	36.98	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Draft City Plan 2012	<b>Density</b>	N/A

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located directly off the A27 dual carriageway providing excellent access.	5
Local accessibility (local road access and public transport)	Located within 250 metres of a variety of bus stops offering services in and around Brighton and Hove. No existing local road access given the site is undeveloped.	2
Proximity to urban areas and access to labour & services	Edge of the urban area located close to a residential area. Limited local services in close proximity.	2
Compatibility of adjoining uses	Open land to the north (South Downs National Park) with a residential area located on the southern and western edges. The site is bounded by the A27 to the north.	4
Development and environmental constraints	Sloping site with thick vegetation currently on site (possible Tree Preservation Orders) but no obvious constraints. Potential visual impact on South Downs National Park would need to be addressed through design.	2
Market attractiveness	High profile, prominent site located in a 'gateway' position into the city. The site is subject to planning and would require a high-class mixed use masterplan to ensure sensible redevelopment.	5
Planning factors	Allocated within Draft City Plan to secure a modern, high quality and sustainable mixed use development to help meet the future needs of the city, improve accessibility and provide new community facilities to share with adjacent neighbourhoods. This should include a minimum of 700 residential units, 25,000sqm of B1a and b office space and a new secondary school.	
Barriers to delivery	No existing infrastructure on the site and it would therefore require a comprehensive masterplan which includes a realistic and sensible access point off the A27. Environmental sensitivity may also limit development opportunities.	
Potential uses	B1/B2/B8	
Timescale/availability	Long-term subject to delivery and planning. Ideally the site should be subject to mixed-use development rather than full employment use.	

**Total Score:** **20**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>South Portslade Industrial Estate</b>	<b>Reference</b>	<b>D18</b>
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<b>Total site area (ha)</b>	5.39	<b>Current uses</b>	Sui Generis/B1a/B1c/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium/High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located along the A259 providing reasonable quality access along main roads. Located approximately 3.5 km from the A27 dual carriageway along A-roads.	4
Local accessibility (local road access and public transport)	Directly adjacent to 5 bus stops offering up to 6 different services to local areas in Bognor Regis and Worthing. Several local access points off the A259. The access points are reasonable but are slightly constrained offering poor visibility splays and congested junction points. Predominantly on-street parking exists with limited dedicated company parking bays.	3
Proximity to urban areas and access to labour & services	Within the urban area of Shoreham and within close proximity to some local services.	4
Compatibility of adjoining uses	Within a residential area however a relatively self-contained site. The site has lots of local roads running through the site, breaking up the uses and allowing residential traffic to utilise the roads.	4
Development and environmental constraints	No obvious constraints exist however no developable land is available.	4
Market attractiveness	Low quality premises offering no site management therefore resulting in a worn/run-down estate. Some vacant units apparent however some of the site does benefit from major road frontage giving the site a reasonable good profile.	3
Planning factors	The site is currently allocated within the Local Plan as an area identified for employment (industry and business). The Draft City Plan seeks to designate the South Portslade Industrial Area as a Strategic Employment/Mixed-use Area and promote a comprehensive redevelopment approach, including some appropriately located mixed-use residential development, in accordance with a future brief that will form part of the AAP and improve connections and townscape around key linkages including the Boundary Road/Station Road (B2194) district retailing centre, Church Road (B2193) and along the A259.	
Barriers to delivery	Fragmented ownership may prevent large-scale redevelopment of the site whilst no developable sites currently exist.	
Potential uses	B1a/B1c and small-scale B8	
Timescale/availability	Limited possibility for intensifying without full-scale redevelopment.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Block J Brighton Station Site</b>	<b>Reference</b>	<b>D19</b>
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<b>Total site area (ha)</b>	0.44	<b>Current uses</b>	None
<b>Undeveloped land (ha)</b>	0.44	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	N/A (vacant)

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	The site is located along the A270 providing good strategic access.	4
Local accessibility (local road access and public transport)	The site is located directly adjacent to a bus stop offering good local services at regular times. The site is also situated directed adjacent to the railway station and has good local access opportunities off unconstrained new roads.	4
Proximity to urban areas and access to labour & services	On the edge of the town centre providing a range of services.	4
Compatibility of adjoining uses	Surrounded by new residential development (apartments) to the east and railway station directly to the west. The site is relatively self-contained by urban form and road network.	4
Development and environmental constraints	Large site, level but slightly irregular in shape. No obvious constraints to development.	5
Market attractiveness	This vacant plot has the potential to offer a high quality employment use that would be very attractive to the market particularly given the surrounding area and the close proximity of the railway station.	4
Planning factors	The site is allocated within DA4 Area of the Draft City Plan, and forms part of the wider New England Quarter development. The site already has extant permission for B1a office use and this use is protected through the Draft Plan. The site is also allocated within the 2005 Local Plan, designated as: EM1 Identified employment sites (industry and business); EM2 Sites identified for high-tech and office uses; EM9 Mixed uses and key mixed use sites; EM13 Brighton Station - mixed uses and, H01 Housing sites and mixed use sites with an element of housing.	
Barriers to delivery	No obvious barriers to delivery.	
Potential uses	B1a/mixed use	
Timescale/availability	Available immediately. Planning permission BH2010/03999 granted for site redevelopment.	

**Total Score:** **25**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Block K Brighton Station Site</b>	<b>Reference</b>	<b>D20</b>
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<b>Total site area (ha)</b>	0.06	<b>Current uses</b>	Vacant
<b>Undeveloped land (ha)</b>	0.06	<b>Sequential status</b>	Edge of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	The site is located along the A270 providing good strategic access	4
Local accessibility (local road access and public transport)	The site is located directly adjacent to the main railway station and close to bus stops. The site is vacant so direct access is difficult to assess however the site is located along good unconstrained roads.	4
Proximity to urban areas and access to labour & services	The site is located within the urban area and on the edge of the town centre. Within comfortable walking distance to an excellent range of services.	4
Compatibility of adjoining uses	Located within an area that has been subject to large-scale regeneration and development. An office based employment use would be fully compatible within this area.	4
Development and environmental constraints	Site topography may create development problems and the site is slightly irregular in shape. No severe development constraints identified.	4
Market attractiveness	The site has the potential to be very attractive to the market once redeveloped. Currently a vacant site with huge development potential.	3
Planning factors	The site is allocated within DA4 Area of the Draft City Plan, and forms part of the wider New England Quarter development. The site already has extant permission for B1a office use and this use is protected through the Draft Plan. The site is also allocated within the 2005 Local Plan, designated as: EM1 Identified employment sites (industry and business); EM2 Sites identified for high-tech and office uses; EM9 Mixed uses and key mixed use sites; EM13 Brighton Station - mixed uses and, HO1 Housing sites and mixed use sites with an element of housing.	
Barriers to delivery	No obvious barriers to delivery – market downturn may have stifled earlier redevelopment.	
Potential uses	B1a	
Timescale/availability	Available immediately – planning permission has been granted (BH2008/01148) and therefore a realistic option in the short term subject to developer interest.	

**Total Score:** **23**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Patcham Court Farm</b>	<b>Reference</b>	<b>D21</b>
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<b>Total site area (ha)</b>	1.46	<b>Current uses</b>	Sui Generis
<b>Undeveloped land (ha)</b>	0.70	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated for high-tech and office uses in Local Plan; identified for B1 employment space within the Draft City Plan 2012	<b>Density</b>	Low

Criteria	Comment	Score (out of 5)
Strategic access	Located directly of the A27 providing excellent access along good quality roads.	5
Local accessibility (local road access and public transport)	Within 400 metres of two bus stops offering up to 12 regular services between Patcham and Brighton. The local road (Vale Avenue) provides reasonably good quality access but some on-street parking may restrict HGV movements.	4
Proximity to urban areas and access to labour & services	The site is located on the edge of the urban area with limited access to local facilities.	2
Compatibility of adjoining uses	The site is completely self-contained with the A27 to the north and west and the site screened by a thick line of trees and vegetation.	4
Development and environmental constraints	No obvious constraints for development although there is a need to be aware of Highways Authority concerns given the site is within close proximity to the A27/A23 junction where stacking problems already occur at peak hours. In close proximity to South Downs National Park and Conservation Area to south.	2
Market attractiveness	Large, regular shaped site in a very high profile location offering significant, however not a proven location for employment.	3
Planning factors	Within the Local Plan 2005, the site is identified for high-tech and office uses. It is also allocated within the Draft City Plan as a strategic site within Policy CP3 for B1 employment floorspace. Previous proposals for hotel, leisure club and office space not being progressed; now pending future sale by BHCC.	
Barriers to delivery	No obvious barriers to delivery but former bids for the site have failed. The Local Authority need to sell the site to achieve future development.	
Potential uses	B1a/B2/B8	
Timescale/availability	Council owned – land available for purchase immediately. Requires planning. Medium term option.	

**Total Score:** **20**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Bell Tower Industrial Estate</b>	<b>Reference</b>	<b>S1</b>
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<b>Total site area (ha)</b>	0.37	<b>Current uses</b>	B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located directly off the A259 providing good access and good quality roads however located over 5km from the primary road into Brighton, the A27.	4
Local accessibility (local road access and public transport)	Local access via Roedean Road (B road). The access is reasonably good but slight congestion exists given that the road provides a direct link into Brighton centre. On site parking is good however a little congested, limited vehicle manoeuvring for HGVs.	4
Proximity to urban areas and access to labour & services	The site is located within the urban area with reasonable access to some local services.	4
Compatibility of adjoining uses	The site is bound to the south by residential properties and to the east by the large gas works site. The site is compatible with the surrounding uses.	4
Development and environmental constraints	No obvious constraints however the site is located adjacent to the old gas works which may mean the site has potential contamination issues.	3
Market attractiveness	The site is high-profile offering good local signage and road frontage. The units are of reasonable quality with no vacancies existing on site.	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	No obvious barriers exist.	
Potential uses	B1c	
Timescale/availability	Not available – it is a good local site providing good and functional local employment opportunities. The site may have potential to be intensified but this would require full scale redevelopment, particularly to reflect the redevelopment of the gas works site.	

**Total Score:** **23**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Centenary Industrial Estate</b>	<b>Reference</b>	<b>S2</b>
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<b>Total site area (ha)</b>	1.13	<b>Current uses</b>	B1a/B1c/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Situated approximately 4km from the A27 however situated with 200 metres of the A270 which provides a dual carriageway linking the main strategic roads. Overall, reasonable to good quality access arrangements.	4
Local accessibility (local road access and public transport)	Located within 350 metres of 2 bus stops offering up to 19 local services around Uckfield, Patcham and Brighton. Dedicated access road shared with Sainsbury's supermarket. Internal spine road reasonably good with dedicated parking facilities.	4
Proximity to urban areas and access to labour & services	Within the urban area – close to a residential area to the south with local services in reasonable proximity. Supermarket directly adjacent to the site.	4
Compatibility of adjoining uses	Whilst a small residential area abuts the site to the south and west, the site remains relatively self-contained. These residential units are also at different levels providing a greater level of screening and self-containment.	4
Development and environmental constraints	Large site with no obvious constraints however the site is slightly irregular in shape. Limited prospects for extending existing buildings.	4
Market attractiveness	Good quality units that are well maintained. No vacant units exist demonstrating a good local employment source.	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	No obvious barriers to delivery; no land available for development and the site would therefore require full redevelopment to intensify.	
Potential uses	B1c/B2/B8	
Timescale/availability	No land available – all current units fully occupied.	

**Total Score:** **24**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>English Close Industrial Area, Old Shoreham Road</b>	<b>Reference</b>	<b>S3</b>
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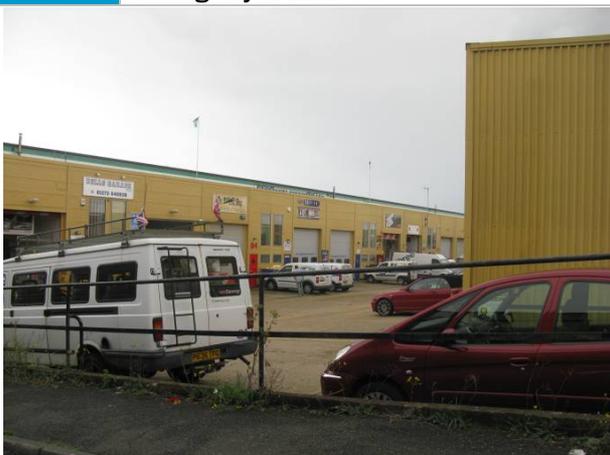
<b>Total site area (ha)</b>	1.56	<b>Current uses</b>	B1a/B1c/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located directly along the A270 dual carriageway providing good, unconstrained strategic access along good roads.	4
Local accessibility (local road access and public transport)	Dedicated access off English Close for part of the site. Most of the units have off road parking areas however other parts of the site have very limited off road access. A bus stop is directly adjacent to the site offering a variety of regular local services.	3
Proximity to urban areas and access to labour & services	The site is located to the south of a residential area and located on a main road leading directly into Hove. The site has limited access to local services.	3
Compatibility of adjoining uses	A reasonably well contained site located close to a residential quarter to the north and a big cemetery to the west. The site is also bounded by the A270 to the south.	3
Development and environmental constraints	A large site and relatively regular in shape. Whilst the topography of the site is slightly sloping, no obvious constraints exist.	4
Market attractiveness	High profile site on a main arterial road. Some elements of the business park consist of new builds whilst other units are in need of repair. Generally the quality of the site is good and some separate management exists within the site which would appeal to future occupiers.	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	Fragmented ownership may restrict development opportunities.	
Potential uses	B1a/B1c	
Timescale/availability	No land available for development and limited space to intensify.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Hollingbury Industrial Estate</b>	<b>Reference</b>	<b>S4</b>
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<b>Total site area (ha)</b>	9.92	<b>Current uses</b>	B1a/B2/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Located directly adjacent to the A27 providing direct access onto the site. Excellent roads and good strategic access for people commuting in to Brighton for work.	4
Local accessibility (local road access and public transport)	The site is serviced by Crowhurst Road which is shared with the Asda superstore. Bus stops available adjacent to the site offering regular public services. Majority of units have their own access and parking facilities however the access is busy and congested with on-street parking.	3
Proximity to urban areas and access to labour & services	On the edge of the urban areas with some residential uses to the south of the site. Limited access to local services however foodstore directly adjacent to the site.	3
Compatibility of adjoining uses	Surrounded by open countryside and adjacent to large retail uses/car showrooms. No conflicts with surrounding uses.	4
Development and environmental constraints	The site topography is sloping steeply, particularly the access road. Road access is a significant constraint and would limit intensification of redevelopment of the site. No other obvious constraints.	3
Market attractiveness	Very large, high profile site offering a good range of buildings, all in reasonably good quality. Low vacancy rates exist demonstrating a good local employment facility.	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) however the site is also designated (NC4) within a site of Nature Conservation Importance (SNCI). The Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	No known barriers aside from the planning factors noted above.	
Potential uses	B1/B2/B8	
Timescale/availability	No immediate development opportunities, although it is understood that a number of occupiers are considering relocation options so some redevelopment opportunities may emerge in the medium-term.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Hollingdean Industrial Estate</b>	<b>Reference</b>	<b>S5</b>
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<b>Total site area (ha)</b>	3.92	<b>Current uses</b>	B8/Council depot/waste site
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Situated approximately 4km from the A27 however situated with 200 metres of the A270 which provides a dual carriageway linking the main strategic roads. Overall, reasonable to good quality access arrangements.	4
Local accessibility (local road access and public transport)	The site consists of two sites with three occupiers both accessed via Upper Hollingdean Road. No on-street parking exists with very good internal road layout including a new roundabout. The site has access to a number of bus stops offering good local service provision.	4
Proximity to urban areas and access to labour & services	Within the urban area. Located close to a residential area with a good access to a variety of local services.	4
Compatibility of adjoining uses	The site is self-contained. The site is located in a residential area bound by a railway line to the south. The refuse use however may be detrimental to the neighbouring uses and amenity given the constant vehicular activity travelling onto and off the site throughout the day.	3
Development and environmental constraints	The site slopes relatively steeply to the north-west but the site is large enough to accommodate a sloping access. The site is regular in shape offering no obvious constraints.	4
Market attractiveness	The site offers two private occupiers and the council depot. The site is fully occupied and very active. The site consists of a very modern building as well as a building offering storage facilities which is slightly worn and tatty. The site is relatively medium profile however it is evident that the site functions reasonably effectively.	3
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business). Within the Draft City Plan, the site will continue to be protected as a site for B1, B2 and B8 uses.	
Barriers to delivery	There is no developable land unless the current occupiers relocate.	
Potential uses	B1c and small scale B8	
Timescale/availability	Nothing immediately available however redevelopment may improve and intensify the site. This would be subject to the relocation of the existing occupiers.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Home Farm Industrial Area</b>	<b>Reference</b>	<b>S6</b>
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<b>Total site area (ha)</b>	2.50	<b>Current uses</b>	B1a/B1c/B2/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located less than 2km from the A27 dual carriageway along the A270 dual carriageway providing excellent strategic access to the site.	3
Local accessibility (local road access and public transport)	Good local access with the site having its own dedicated access road. Some on street parking exists but most plots have their own parking facilities. Within 600 metres of bus stops offering good service provision.	4
Proximity to urban areas and access to labour & services	Situated on the edge of the urban area. Some local services may be within close proximity however the site is situated along a private access road which isn't particularly pedestrian friendly.	3
Compatibility of adjoining uses	Open countryside surrounding the site. The site is located on the edge of a hill and not within close proximity to any conflicting uses.	4
Development and environmental constraints	The site is located on the edge of the South Downs National Park and therefore in a sensitive location. The site is linear in shape offering with shallow plots offering limited scope for intensification.	3
Market attractiveness	Relatively modern units which are currently fully occupied. The site is in good condition and in a reasonably attractive location for future occupiers. The site has no room for expansion or intensification.	4
Planning factors	The Draft City Plan will continue to protect the site for B1, B2 and B8 uses. Site adjoins South Downs National Park Authority area.	
Barriers to delivery	National Park policies may limit the future development potential of the site. There is no vacant land or any potential for future intensification without full-scale redevelopment.	
Potential uses	B1c/B2 and small-scale B8	
Timescale/availability	The site is fully occupied with limited scope for intensification.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Hove Technology Park, St Josephs Close, Old Shoreham Road</b>	<b>Reference</b>	<b>S7</b>
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<b>Total site area (ha)</b>	4.59	<b>Current uses</b>	B1a/B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Located with 4km of the A270 dual carriageway along good quality A-roads.	4
Local accessibility (local road access and public transport)	The site has its own access located on a junction with traffic lights. This access is shared with Homebase and Curry's. The internal layout is of high quality with very limited on-street parking with most units having their own parking facilities. Located in close proximity to a number of bus stops offering a good local transport service provision.	4
Proximity to urban areas and access to labour & services	Within the urban area with some local services within close proximity to the site.	3
Compatibility of adjoining uses	Whilst surrounded by a residential area, the site is self-contained ensuring full compatibility with the surrounding area.	3
Development and environmental constraints	No obvious constraints identified.	4
Market attractiveness	The site is a relatively high profile site which is predominantly occupied. Potentially 5% vacancy exists however the site is very busy. Separate areas are marketed and managed within the site whilst other elements of the site include buildings in poorer condition.	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business). Within the Draft Plan, the site is protected for B1, B2 and B8 uses.	
Barriers to delivery	No obvious barriers identified.	
Potential uses	B1a/B1c	
Timescale/availability	Nothing available and limited scope to intensify.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Moulsecomb &amp; Fairways Industrial Estate</b>	<b>Reference</b>	<b>S8</b>
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<b>Total site area (ha)</b>	1.10	<b>Current uses</b>	B1c/B2/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located approximately 1.5 km from the A27 along the A270. Both roads with dual carriageways providing excellent strategic access.	4
Local accessibility (local road access and public transport)	<p>The site is broken up into two distinct plots. The larger plot to the east is of better quality with its own dedicated access point. The internal layout offers wide roads and pavements providing good accessibility. The site offers on-street parking which may cause difficulties for the turning of large vehicles.</p> <p>The smaller site to the west is occupied by 'Kingspan Waste' The site offers very poor access with HGVs parking on the road waiting to access the site. This causes congestion on the road given the close proximity of the site to a busy junction.</p> <p>Both sites are in close proximity to a number of bus stops offering good local transport serves.</p>	3
Proximity to urban areas and access to labour & services	The site occupies an edge of centre location providing limited access to services.	2
Compatibility of adjoining uses	The site is split into two sections with a church occupying the middle. Despite this sensitive neighbouring use, the current activity is remains relatively industrial. The site is however relatively self-contained and generally compatible with its surroundings.	3
Development and environmental constraints	No obvious constraints to development however, no vacant land available.	4
Market attractiveness	<p>The Kingspan Waste site has units in poor quality and in need of repair. These units are however commensurate with their current use.</p> <p>The larger site offers good quality units which are recently built. 5% vacant units demonstrating a good local employment site providing a good local service. Relatively attractive to the market.</p>	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	Highways/junction arrangements may act as a constraint in the event of redeveloping the smaller western part of the site.	
Potential uses	B1c/B2 and B8	
Timescale/availability	Potentially one vacant unit available but no other units or land currently available. Limited scope for expansion or intensification of the site.	

**Total Score:** **20**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Sussex House (including BT depot)</b>	<b>Reference</b>	<b>S9</b>
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<b>Total site area (ha)</b>	1.86	<b>Current uses</b>	B1c/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located approximately 3 km from the A27 in a predominantly residential area however situated along the A270 providing good access along good quality roads.	4
Local accessibility (local road access and public transport)	The site has a separate access off the main road but the junction is of poor quality which is relatively narrow. A large area of parking is available on site but appeared predominantly vacant at the time of visiting. The site is located within close proximity to a number of bus stops offering over 5 regular services.	3
Proximity to urban areas and access to labour & services	The site is located within the urban area with some local services available within close proximity.	4
Compatibility of adjoining uses	Residential use to the east and a large cemetery to the west. The site is bounded by a railway line to the south and the A270 to the north. The current employment uses do not harm residential amenity and are compatible with the area.	4
Development and environmental constraints	No obvious constraints exist.	4
Market attractiveness	A large, flat site which is in a relatively low profile location however all the units on site are fully occupied, demonstrating good local importance.	3
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	Potentially fragmented ownership may restrict development opportunities but no other obvious barriers to delivery.	
Potential uses	B1c and small-scale B8	
Timescale/availability	Nothing immediately available with no current vacancies. The site does offer potential for intensification or full-scale redevelopment in the long term.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Hyde Business Park, Bevendean</b>	<b>Reference</b>	<b>S10</b>
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<b>Total site area (ha)</b>	4.16	<b>Current uses</b>	B1a/B1c/B2/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located in a residential area with poor access to major roads. Roads likely to incur significant congestion at peak periods of the day,	2
Local accessibility (local road access and public transport)	The site access is shared with a residential road and a long distance from any strategic road. Lots of on-street parking exists with limited space for manoeuvring. A reasonable internal layout exists providing a circular route however congested site. A bus stop is available within 150 metres of the site offering up to 6 regular services.	2
Proximity to urban areas and access to labour & services	Located at the edge of a busy residential area with no evidence of easy access to any local services.	1
Compatibility of adjoining uses	The site is bound by South Downs National Park to the east, south and west of the site meaning the employment use is compatible with its surroundings.	4
Development and environmental constraints	The site is regular in shape but is slightly sloping from south to north. No other obvious constraints exist.	3
Market attractiveness	The majority of the units are of poor quality on a site in a peripheral location. The site is however busy with only 1 vacant unit available. It is evident that the site continues to provide a good local employment service. Previously subject to Single Regeneration Budget funding to upgrade quality and appearance.	3
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	In the event of complete redevelopment, access may be an issue to securing planning permission. No other obvious barriers to delivery.	
Potential uses	B1c	
Timescale/availability	No vacant developable plots currently available but the site has potential for full-scale redevelopment in the medium-long term.	

**Total Score:** **15**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Victoria Road Industrial Estate</b>	<b>Reference</b>	<b>S11</b>
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<b>Total site area (ha)</b>	2.17	<b>Current uses</b>	B1c/B8/Sui generis
<b>Undeveloped land (ha)</b>	0.4	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located less than 2km from the A27 which is connected by the A293 which is located approximately 0.3 km from the site along some local roads. The access arrangements may provide some congestion given the central location but not anticipated to be too problematic.	3
Local accessibility (local road access and public transport)	The junction into the site is a little constrained given the busy Victoria Road. Access is reasonable once into the site with both parts of the site having dedicated access points. The internal layout is inefficient and could be better utilised to maximise the available space. Within 350 metres of a number of bus stops offering a large range of local service provision. In close proximity to Portslade railway station.	3
Proximity to urban areas and access to labour & services	The site is located with the urban area, located within close proximity to some local services.	3
Compatibility of adjoining uses	Large, self-contained site bound by the railway line to the south and additional car showrooms to the east. Some residential units exist in close proximity to the site but the existing uses are relatively compatibly within the area.	3
Development and environmental constraints	No obvious constraints exist.	4
Market attractiveness	Relatively high-profile site with a large element of the site used for car-showrooms and small scale B8/trade counters to the rear. The units are in reasonable condition. The site layout does not currently maximise the potential of the site with vacant plots available for development depending on ownership.	3
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	No obvious barriers identified.	
Potential uses	B1c/B2/B8	
Timescale/availability	One plot is immediately available for redevelopment whilst the current layout (lots of parking) is not necessarily the most effective use of space. Intensification possible however full redevelopment would be preferable to maximise the sites potential.	

**Total Score:** **19**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Woodingdean Business Park</b>	<b>Reference</b>	<b>S12</b>
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<b>Total site area (ha)</b>	3.89	<b>Current uses</b>	B1a/B2/B8
<b>Undeveloped land (ha)</b>	0.37	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located approximately 2.9km from the A27 in a predominantly residential and rural area of Brighton. The site is located along the B2123 which is congested at peak times.	3
Local accessibility (local road access and public transport)	The site is located directly off the B2123 which is very busy during peak working hours. Slight congestion existed at the junction however the site has its own dedicated access road. The internal layout of the site is good and plenty of on-site parking facilities exist. A number of bus stops surround the site providing good local transport provision.	4
Proximity to urban areas and access to labour & services	On the edge of a large residential suburb and local at the edge of the urban area. Within close proximity to a small district centre serving the residential area.	3
Compatibility of adjoining uses	The site is very well screened and self-contained despite the residential area directly abutting the site along the southern boundary. Greenfield land to the north with the B2123 and Bexhill Road screening the sites northern and western boundary.	4
Development and environmental constraints	South Downs National Park lies to the north on the opposite side of the road; no obvious constraints.	4
Market attractiveness	Very attractive to the market despite the out-of-centre location. Brand new development offering modern, good size units. Some vacant units are available given the recent development of the site.	4
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	No obvious barriers identified.	
Potential uses	B1c/B2/B8	
Timescale/availability	Immediate availability with brand new units available to let. Part of site (0.37ha) vacant and subject to a current planning application for B8 warehouse with ancillary offices.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Newtown Road Industrial Estate</b>	<b>Reference</b>	<b>S13</b>
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<b>Total site area (ha)</b>	2.4	<b>Current uses</b>	B2/B8/Sui Generis
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located within 0.5 Km of the A270 providing good access along good quality roads.	4
Local accessibility (local road access and public transport)	Good local access directly off the A270. Each plot has its own dedicated access and some parking facilities. On-street parking exists along Newtown Road but does not overly congest the site. HGV movements may be slightly restricted but individual plots do accommodate HGV turning facilities. In close proximity to Hove train station and local bus routes.	4
Proximity to urban areas and access to labour & services	Within the urban area but in an out-of-centre location. Some local facilities in close proximity including Goldstone Retail Park and local convenience stores.	3
Compatibility of adjoining uses	Whilst in close proximity to residential areas, the site is surrounded by large out-of-centre retail parks. The site is self-contained and is fully compatible with the surrounding uses.	4
Development and environmental constraints	No obvious development constraints.	4
Market attractiveness	Medium profile site. Irregular in shape with limited depth to the individual plots. No room for expansion. Some vacancies exist on site however the units tend to be in reasonable good condition and fit for purpose.	3
Planning factors	The existing Local Plan protects the site employment use only (EM1 - industry and business) and the Draft City Plan will continue to protect the site for B1, B2 and B8 uses.	
Barriers to delivery	No room for expansion without full scale redevelopment. No obvious barriers apparent.	
Potential uses	B1/B2/B8	
Timescale/availability	Some plots currently vacant and available immediately. The site does not offer potential for intensification but employment-led redevelopment may be an option in the longer term.	

**Total Score:** **22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Franklin Road Industrial Estate</b>	<b>Reference</b>	<b>M1</b>
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<b>Total site area (ha)</b>	0.53	<b>Current uses</b>	B1a/B1c/B8
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Located less than 2.5km from the A27 connected by the A293 and smaller b-roads. Access to the site is likely to be compromised by its central location and congestion along these minor roads through residential areas during peak hours is likely.	3
Local accessibility (local road access and public transport)	Accessed off residential streets but the site has its own dedicated access. There is substantial on street parking which would severely limit HGV movements. The surrounding roads are particularly busy during peak times. The site is within walking distance of a number of bus stops offering good local transport provision.	2
Proximity to urban areas and access to labour & services	The site is located within a built up residential area and is located close to some local services.	3
Compatibility of adjoining uses	The site is surrounded by a residential area on 3 sides and a play park to the west. The site is very constrained within the residential area and is not a particularly compatible use.	2
Development and environmental constraints	The site road access is very limited and the proximity to the residential area makes any development unfeasible without full-scale redevelopment. No other obvious constraints on site.	3
Market attractiveness	The site is in a low profile location with buildings that are in reasonable condition. Currently two occupiers on site (Infinity Foods / BBP Printing).	3
Planning factors	Within the Local Plan 2005 the site is an Identified employment site under policy EM1 (industry and business). Within the Draft City Plan, in order to secure good quality modern, flexible employment floorspace the council will allow employment-led (residential and employment) mixed use development at this site.	
Barriers to delivery	Subject to relocation of existing occupiers, although it is understood that Infinity Foods are currently seeking to relocate to larger premises.	
Potential uses	B1a/c only but the site does have potential for mixed-use or residential development.	
Timescale/availability	Freehold lease is currently advertised on the site, so potentially available immediately.	

**Total Score:** **16**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Melbourne Street Industrial Area</b>	<b>Reference</b>	<b>M2</b>
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<b>Total site area (ha)</b>	0.55	<b>Current uses</b>	B1c/B2
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located approximately 3.5 km from the A27. The site lies directly along the A270 providing good access to the site.	4
Local accessibility (local road access and public transport)	The site is located directly off the A270 offering only one narrow access point providing very difficult turning facilities. The internal layout of the site is poor, narrow and congested with on-street parking. Excellent public transport provision within the vicinity of the site.	2
Proximity to urban areas and access to labour & services	The site is located in the urban area with a good range of services nearby.	4
Compatibility of adjoining uses	The site is surrounded by a residential area and school limiting the compatibility of the site however the current uses appear generally acceptable. Scope for increased pressure from new-build residential opposite the site.	3
Development and environmental constraints	The site slopes very steeply towards the rear of the site hindering vehicle movements. The shape of the site is irregular and tightly compacted limited development potential. No other obvious constraints identified.	3
Market attractiveness	The site is of poor quality in a low profile location and the buildings are in disrepair. Operators of Enterprise House report some vacancy, and there has been some change of use of upper floors to D2 leisure uses (also vacant).	3
Planning factors	Within the Local Plan 2005 the site is an Identified employment site under policy EM1 (industry and business). Within the Draft City Plan, in order to secure good quality modern, flexible employment floorspace the council will allow employment-led (residential and employment) mixed use development at this site.	
Barriers to delivery	With no capacity for intensification, the site would require comprehensive redevelopment and an improvement on the current access arrangements.	
Potential uses	B1c if better reorganised to accommodate such a use	
Timescale/availability	Medium-term subject to relocation of existing occupiers	

**Total Score:** **19**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Portland Road Trading Estate (including EDF and Martello House)</b>	<b>Reference</b>	<b>M3</b>
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<b>Total site area (ha)</b>	3.25	<b>Current uses</b>	B1a/B1c and Trade Counters (Sui generis)
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium to High

Criteria	Comment	Score (out of 5)
Strategic access	Located approximately 2.5 km from the A27 and 0.5 km from the A270. The site is located in a predominantly residential area which may result in congestion problems during peak hours.	3
Local accessibility (local road access and public transport)	The site has good access offering two separate access roads to individual parts of the site. The turning arrangements are good and the junctions provide good visibility for HGVs. The site has good parking facilities. The site is also situated directly adjacent to a number of bus stops offering a good range of local transport services.	4
Proximity to urban areas and access to labour & services	The site is located on the edge of Hove with a reasonable range of local services nearby.	4
Compatibility of adjoining uses	The site is bound to the north by a railway line, to the south and east by roads and a few houses located to the west and adjacent to the site to the south. The site is generally compatible with the surrounding area.	4
Development and environmental constraints	The site is slightly sloping however no other obvious constraints identified.	4
Market attractiveness	A high profile site with the units all being in reasonably good condition despite being slightly outdated. EDF Energy occupy the main office building and larger part of the site; small terrace of industrial units (with a number in sui generis use); Martello House (former HMRC building) subject to refurbishment and now being marketed as small office suites.	3
Planning factors	Within the Local Plan 2005 the site is an Identified employment site under policy EM1 (industry and business). Within the Draft City Plan, in order to secure good quality modern, flexible employment floorspace the council will allow employment-led (residential and employment) mixed use development at this site.	
Barriers to delivery	No obvious barriers identified – the site may have potential for slight intensification if redeveloped.	
Potential uses	B1a/B1c	
Timescale/availability	1 vacant unit available immediately. No other units available.	

**Total Score:**

**22**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>School Road, Hove</b>	<b>Reference</b>	<b>M4</b>
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<b>Total site area (ha)</b>	1.21	<b>Current uses</b>	B1a and B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005; Draft City Plan 2012	<b>Density</b>	Medium

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located approximately 3km from the A27 however situated directed adjacent to the A270 connecting to the A2023, both dual carriageways providing good accessibility.	3
Local accessibility (local road access and public transport)	The site is located along residential roads and the access is shared with a school. The residential roads have a considerable amount of on-street parking causing congestion. There are regular bus services running along Portland Road within 100 metres of the site.	3
Proximity to urban areas and access to labour & services	The site is located within the urban area and there are a series of local shops and services in close proximity.	3
Compatibility of adjoining uses	Bounded by railway line to the north; surrounded by residential properties.	2
Development and environmental constraints	Irregular shape and adjoining residential uses would restrict redevelopment options.	2
Market attractiveness	Site comprises a number of older industrial buildings which appear under-utilised and with a number of non B-class uses (e.g. hand car wash, children's play space), and a 1970s office building that appears in reasonable condition and is occupier by smaller businesses.	2
Planning factors	Within the Local Plan 2005 the site is an Identified employment site under policy EM1 (industry and business). Within the Draft City Plan, in order to secure good quality modern, flexible employment floorspace the council will allow employment-led (residential and employment) mixed use development at this site.	
Barriers to delivery	No obvious barriers to delivery.	
Potential uses	B1a/B1c	
Timescale/availability	There are vacant units on the site, both for sale and to let – these are therefore available immediately. The site has potential for redevelopment in the short to medium term.	

**Total Score:** **15**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Land north of Newtown Road</b>	<b>Reference</b>	<b>M5</b>
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<b>Total site area (ha)</b>	0.77	<b>Current uses</b>	Vacant B1/Sui Generis
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Draft City Plan 2012.	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located within 0.5 Km of the A270 providing good access along good quality roads.	4
Local accessibility (local road access and public transport)	Good local access directly off the A270. On-street parking exists along Newtown Road but does not overly congest the site. Goldstone Lane is fairly narrow and would restrict HGV movements. Parking exists along the curbs fronting the buildings. In close proximity to Hove train station and local bus routes.	4
Proximity to urban areas and access to labour & services	Within the urban area but in an out-of-centre location. Some local facilities in close proximity including Goldstone Retail Park and local convenience stores.	3
Compatibility of adjoining uses	Car Sales garage and other employment uses to the north, south and west however the site is in close proximity to residential units directly along Goldstone Lane which may limit future uses.	3
Development and environmental constraints	No obvious development constraints however the site requires demolition of existing units prior to any new development.	4
Market attractiveness	Medium profile site. Regular with poor quality derelict units on site. No room for expansion with the site requiring full-scale redevelopment.	2
Planning factors	Within the Draft City Plan, in order to secure good quality modern, flexible employment floorspace the council will allow employment-led (residential and employment) mixed use development at this site.	
Barriers to delivery	No room for expansion without full scale redevelopment. No obvious barriers apparent.	
Potential uses	B1c/B2	
Timescale/availability	Some plots currently vacant and available immediately. The site does not offer potential for intensification.	

**Total Score:** **20**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Old Steine Area, Central Brighton</b>	<b>Reference</b>	<b>N1</b>
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<b>Total site area (ha)</b>	Site consists of: 1 Gloucester Place: 0.096 23 Grand Parade: 0.008 Pavilion House: 0.02	<b>Current uses</b>	B1a
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	City centre
<b>Site status</b>	Not allocated in the Brighton and Hove Local Plan 2005	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Whilst congested, these sites directly adjoin the A23 providing good strategic access out of the town centre.	4
Local accessibility (local road access and public transport)	The three sites are all located directly off the A23 providing excellent local access. Regular bus services run along the A23 offering excellent public transport services. Vehicular access is however constrained and no parking facilities exist for the three sites.	3
Proximity to urban areas and access to labour & services	The three sites are located in the city centre and therefore have good access to an excellent range of services.	5
Compatibility of adjoining uses	Given the B1a use, all three sites are compatible with the surrounding uses given the office/retail/residential surrounding uses.	5
Development and environmental constraints	No obvious constraints.	4
Market attractiveness	The three sites are attractive office spaces, located within a high profile location. The properties are all of high quality.	5
Planning factors	White land	
Barriers to delivery	No land available and no development opportunities.	
Potential uses	B1a	
Timescale/availability	Nothing available with all units occupied – no scope for intensification or development.	

**Total Score:** **26**

[Scoring: 5 = best, 1 = worst]

Site Name	North Laine, Central Brighton		Reference	N2
				
Total site area (ha)	Consists of  1 Jubilee Street:: 0.04 Gloucester Yard: 0.05		Current uses	B1a/B1c
Undeveloped land (ha)	0.0		Sequential status	City Centre
Site status	Allocated in the Brighton and Hove Local Plan 2005		Density	High

Criteria	Comment	Score (out of 5)
Strategic access	Both sites are located very close to the A23 but situated down some busier local roads which hinder the access.	3
Local accessibility (local road access and public transport)	Both sites are in predominantly pedestrian areas, particularly 1 Jubilee Street. Gloucester Yard had some parking facilities but the use appears to be a much smaller scale businesses which could accommodate some employees driving. Both sites have good access to public transport.	4
Proximity to urban areas and access to labour & services	Both sites are located within the urban area and town centre. 1 Jubilee Street is located in the heart of the town centre whilst Gloucester Yard is within 5 minutes walk of the town centre. Both sites have good access to an excellent range of public services.	5
Compatibility of adjoining uses	Both sites are fully compatible with the surrounding town centre, residential, retail and office uses.	4
Development and environmental constraints	No obvious constraints however neither site has any potential for further development.	5
Market attractiveness	1 Jubilee Street offers an excellent, high quality town centre office facility with ground floor retail. It is in a very high profile location with no vacancies. Gloucester Yard is in a lower profile location but is situated in a good quality building and also has no vacant units.	5
Planning factors	This falls within three Local Plan 2005 designations; Mixed uses and key mixed use sites (EM9); Jubilee Street - mixed uses (EM15); and, Housing sites and mixed use sites with an element of housing (HO1).	
Barriers to delivery	Neither site has potential for further development.	
Potential uses	B1a – 1 Jubilee Street  B1a/B1c – Gloucester Yard	
Timescale/availability	Nothing available with both units fully occupied. No scope for intensification or redevelopment.	

**Total Score:** **26**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>North Street (Clarence House and 27 North Street)</b>	<b>Reference</b>	<b>N3</b>
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<b>Total site area (ha)</b>	Clarence House: 0.05 27 North Street: 0.04	<b>Current uses</b>	B1a
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	City Centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located close to the A2010 and A23 however situated within the town centre along more congested local roads, hindering the strategic access.	3
Local accessibility (local road access and public transport)	Pedestrian access is excellent for these two adjoining properties on the basis of the town centre location. Some parking facilities are available to the rear of the property however limited. Car access would be difficult and very congested during peak hours. The site is located with 5 minutes of a range of bus services offering a range of services locally.	3
Proximity to urban areas and access to labour & services	These properties are located in the heart of the city centre and therefore have excellent access to all city centre services.	5
Compatibility of adjoining uses	The B1a uses with ground floor retail (despite being mainly vacant) would be suitably compatible in this location against the surrounding town centre uses.	5
Development and environmental constraints	No obvious constraints. No land available for development. Any redevelopment would require demolition of existing units which may be subject to town centre planning restrictions.	4
Market attractiveness	These sites are currently predominantly vacant with only 2 floors in B1a use. These sites have the potential to be very attractive to the market however 27 North Street in particular is a building in need of refurbishment and repair and appears very outdated along the street scene.	3
Planning factors	Allocated within a Regional shopping centre (SR4) in the Local Plan 2005.	
Barriers to delivery	No obvious barriers to delivery. The site needs to be better marketed and the buildings need to be fully refurbished to improve the employment offer.	
Potential uses	B1a/ground floor retail	
Timescale/availability	The majority of the site is available now.	

**Total Score:** **23**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Trafalgar Place / Queens Road, Central Brighton</b>	<b>Reference</b>	<b>N4</b>
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<b>Total site area (ha)</b>	Site consists of Queensbury House: 0.10 Frederick Place: 0.04 Travis Perkins Site: 0.17	<b>Current uses</b>	B1a/B1c/B2
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	City Centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Whilst located relatively close to the A210, these town centre-based sites hinder strategic access due to regular congestion.	3
Local accessibility (local road access and public transport)	These three sites are located within the heart of the town centre. The local accessibility is excellent with bus stops located with close proximity to all three sites. Vehicular access to all three sites is compromised by the town centre location and particularly the Travis Perkins site which is particularly constrained and unsuitable for HGVs.	3
Proximity to urban areas and access to labour & services	The three sites are located within the town centre and are therefore within close proximity to an excellent range of town centre services.	5
Compatibility of adjoining uses	Both Frederick Place and Queensbury House are very compatible within this area given the B1a use. Travis Perkins site is however incompatible with the surrounding area given the narrow access for large HGVs.	3
Development and environmental constraints	No obvious development constraints.	4
Market attractiveness	Whilst located in close proximity to each other, these three sites have varying characteristics. Both Queensbury House and Frederick Place are attractive to the market offering good town-centre office space. However there are vacancies and floors to let within both buildings. Travis Perkins site is not attractive to the market for the current use given its low profile location and awkward access.	3
Planning factors	This falls within three Local Plan 2005 designations; Mixed uses and key mixed use sites (EM9); Jubilee Street - mixed uses (EM15); and, Housing sites and mixed use sites with an element of housing (HO1).	
Barriers to delivery	Queensbury House can not be redeveloped and Frederick Place has the potential to be refurbished and marketed to fill vacancies. Travis Perkins is surrounded by houses and would therefore restrict large employment intensification.	
Potential uses	B1a/B1c	
Timescale/availability	Vacancies available to be filled immediately. Travis Perkins site has potential for redevelopment subject to the current occupier being relocated.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>City Park, The Droveaway, Hove</b>	<b>Reference</b>	<b>N5</b>
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<b>Total site area (ha)</b>	2.29	<b>Current uses</b>	B1a
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located close to the A2023 which leads directly to the A27 providing relatively good strategic access.	4
Local accessibility (local road access and public transport)	The site has its own access arrangements shared only with Coop delivery access. The road is accessible directly off a junction with traffic lights providing excellent unconstrained access. The site is well managed with security gates at the entrance. The site is landscaped and has internal parking facilities. Regular bus services running along the A203.	4
Proximity to urban areas and access to labour & services	The site is located within the urban area and close to some local services. The site is also directly adjacent to a Coop foodstore.	4
Compatibility of adjoining uses	The site is very well contained by both landscaping and topography. Playing fields are located to the east and a greyhound racing track to the west.	4
Development and environmental constraints	The site is very compact and built to accommodate the current use. No areas exist for expansion. No obvious constraints exist.	4
Market attractiveness	A confined high quality site. Medium profile however occupied by one banking firm and evidently purpose built for their use.	4
Planning factors	Allocated within the Local Plan 2005 as a sites identified for high-tech and office uses (EM2).	
Barriers to delivery	No land available but not obvious barriers to delivery.	
Potential uses	B1a only.	
Timescale/availability	The site is fully occupied and developed – not available.	

**Total Score:** **24**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Knoll Business Park, Bellingham Crescent, Old Shoreham Road</b>	<b>Reference</b>	<b>N6</b>
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<b>Total site area (ha)</b>	0.99	<b>Current uses</b>	B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	No allocation	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located directly along the A270 providing excellent access.	4
Local accessibility (local road access and public transport)	The site can be accessed directly off the A270 and also via the residential road running along the east and west of the site. The internal roads layout is OK but offers a slightly confined space. Dedicated access and good parking facilities. Within a good proximity of a number of bus stops offering good quality local transport provision.	3
Proximity to urban areas and access to labour & services	Within the urban area with some local services available within close proximity.	3
Compatibility of adjoining uses	The site is surrounded by residential uses and the A270 to the south. The site is relatively self confined and is based within an old existing unit that is compatible in the area.	3
Development and environmental constraints	No identified constraints however, the site has limited scope to intensify or redevelop.	4
Market attractiveness	The site is well signposted and actively marketed through Bizspace. Medium profile site location but the site has very low vacancy rates. The existing building is old (possibly an old school) and may be listed making any redevelopment difficult. The site is attractive to small starter businesses.	4
Planning factors	White land	
Barriers to delivery	None apparent.	
Potential uses	B1a and small scale B1c due to the surrounding residential area.	
Timescale/availability	Unavailable with limited scope for intensification or redevelopment.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>The Lanes Area, Central Brighton</b>	<b>Reference</b>	<b>N7</b>
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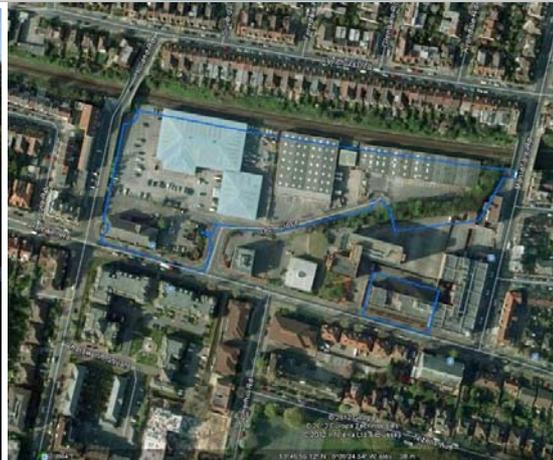
<b>Total site area (ha)</b>	<i>Media Centre: 0.08 Moore House: 0.087 Nile House: 0.07</i>	<b>Current uses</b>	B1a
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	City centre
<b>Site status</b>	Allocated in the Brighton and Hove Local Plan 2005	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located just off the A259 providing very good strategic access, however, the road becomes very congested at peak times.	3
Local accessibility (local road access and public transport)	Given the central location, these sites all have good local access to public transport connections. They are all situated in pedestrian areas with slightly constrained vehicular access although parking facilities are provided at all three sites.	4
Proximity to urban areas and access to labour & services	These sites are all located in the town centre and therefore have access to an excellent range of services.	5
Compatibility of adjoining uses	Given the B1a use, these sites are all very compatible with their surrounding town centre use classes.	5
Development and environmental constraints	No known constraints. Each site is restricted by the urban form and have no further development potential.	4
Market attractiveness	Some vacant floorspace identified across the sites but all good quality units with recognised high branded occupiers. The media centre is situated in an old building which is in need of refurbishment however these sites offer good town centre employment space.	4
Planning factors	Allocated within the Local Plan 2005 as falling within a Regional shopping centre (SR4) and Scheduled ancient monuments and other important archaeological sites (HE12).	
Barriers to delivery	No known barriers – no space for further development and no opportunity for intensification without full-scale redevelopment.	
Potential uses	B1a	
Timescale/availability	Vacant space available but sites are generally well occupied providing good existing employment opportunities.	

**Total Score:** **25**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Peacock Industrial Estate, Lyon Close, including Spitfire House, 141 Davigdor Road</b>	<b>Reference</b>	<b>N8</b>
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<b>Total site area (ha)</b>	2.30	<b>Current uses</b>	Retail units/Trade Counters/B1a
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	No allocation	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Located close to the A270 however connected via minor local roads.	3
Local accessibility (local road access and public transport)	The site is located directly off a main road with its own dedicated access. The access is slightly congested and shared with Wickes/Staples. Some units have their own parking facilities but some on-street parking exists. Local bus services run directly past the site offering direct access to the town centre.	3
Proximity to urban areas and access to labour & services	The site is located within the urban area however in an out-of-centre location. Some local services are available within 10 minutes walk.	4
Compatibility of adjoining uses	A railway line runs directly along the northern boundary of the site with flats surrounding the site to the south across the main road. Whilst located in a predominantly residential area, the site is relatively self-contained and compatible with adjoining uses.	4
Development and environmental constraints	No obvious constraints on site. The access may be a problem if you were to intensify the site.	4
Market attractiveness	Relatively high-profile site. The employment units are in reasonable condition however the site is supported by brand new retail units with reputable occupiers. Some units are to let on site including Spitfire House.	3
Planning factors	White Land	
Barriers to delivery	No obvious barriers to delivery. Potential to intensify the site and Wickes has a large car park to the west which could be better utilised if not required.	
Potential uses	B1a/B1c	
Timescale/availability	Some units to let but no other availability or developable land.	

**Total Score:** **21**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Wellington Road Site, adjacent to South Portslade Industrial Estate</b>	<b>Reference</b>	<b>N9</b>
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<b>Total site area (ha)</b>	0.96	<b>Current uses</b>	B1c/B2
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	No allocation	<b>Density</b>	Medium

Criteria	Comment	Score (out of 5)
Strategic access	Directly adjacent to the A259 providing excellent strategic access.	4
Local accessibility  (local road access and public transport)	Located directly off the A259 making access arrangements very difficult due to constrained junctions and on-street parking. The site is bound by roads including a congested residential road running directly alongside the site further impacting upon congestion. Local bus services located directly adjacent to the site offering over 10 local services.	2
Proximity to urban areas and access to labour & services	The site is located on the edge of Shoreham. The site is relatively isolated despite the main road access into Brighton. Limited local services available.	2
Compatibility of adjoining uses	The site is located directly adjacent to a school in a predominantly residential area. The main A259 and harbour help alleviate some issues of neighbouring uses.	2
Development and environmental constraints	The site is bound by the A259 to the south and residential to the north. There is no potential for intensification of the site without full-scale redevelopment. No other obvious constraints exist.	2
Market attractiveness	The site is a high profile site along a main arterial route. Whilst the site offers poor quality buildings and is an unmanaged site, no vacancies exist demonstrating its local importance.	2
Planning factors	White land	
Barriers to delivery	Fragmented ownership may limited redevelopment opportunities.	
Potential uses	B1c	
Timescale/availability	No available.	

**Total Score:** **14**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Zylo Works Factory Site, Marine View</b>	<b>Reference</b>	<b>N10</b>
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<b>Total site area (ha)</b>	0.20	<b>Current uses</b>	B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	No allocation	<b>Density</b>	High

Criteria	Comment	Score (out of 5)
Strategic access	Within close proximity to the A23 however connected via more local residential roads.	3
Local accessibility (local road access and public transport)	Accessed via a narrow residential roads with lots of on-street parking. The site has limited parking facilities and only a service yard which is very congested. Local bus stops directly adjacent to the site offering good local services.	3
Proximity to urban areas and access to labour & services	Within the urban area offering some local facilities in close proximity to the site.	3
Compatibility of adjoining uses	The site is surrounded by residential properties on all sides restricting particular employment uses on this site. The site is not greatly compatible with the surrounding area.	2
Development and environmental constraints	The site topography is steep and the site is irregular in shape. The site is also overlooked by residential properties limiting development opportunities.	2
Market attractiveness	Low profile site with older industrial buildings in need of modernising. The site is however occupied and appears to be providing a local employment site function.	2
Planning factors	White land	
Barriers to delivery	Relocation of existing occupier and residential amenity impacts.	
Potential uses	B1a/B1c	
Timescale/availability	Fully developed with no vacant land for development.	

**Total Score: 15**

[Scoring: 5 = best, 1 = worst]

<b>Site Name</b>	<b>Cambridge Mews, off Cambridge Grove, Hove</b>	<b>Reference</b>	<b>N11</b>
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<b>Total site area (ha)</b>	1.14	<b>Current uses</b>	B1c
<b>Undeveloped land (ha)</b>	0.0	<b>Sequential status</b>	Out of centre
<b>Site status</b>	No allocation	<b>Density</b>	High

<b>Criteria</b>	<b>Comment</b>	<b>Score (out of 5)</b>
Strategic access	Located directly adjacent to the B2185 providing reasonable strategic access to the site.	3
Local accessibility (local road access and public transport)	The site is located within 5 minutes of local bus services operating a range of local services across the city. The site has its own dedicated access road however this is shared with a residential road. The access is very narrow and difficult for cars to manoeuvre in. The internal layout is poor with parked cars causing on-site congestion.	2
Proximity to urban areas and access to labour & services	The site is located within the urban area but located on the edge of the town centre. The site is however within walking distance from a number of small local services.	3
Compatibility of adjoining uses	Whilst the site is very constrained, the units appear to have a live/work use with upstairs residential and downstairs workshop. This seems compatible with the surrounding residential area due to the self containment of the site.	4
Development and environmental constraints	No obvious constraints. The site is part of a residential area and the workshops form the ground floor area. No room for development or intensification.	2
Market attractiveness	This site is very low profile, hidden behind a row of residential properties fronting the main road. The site is fully occupied and appears a very active employment site. This may not be an attractive site to new occupiers but appears invaluable to the current occupiers and the area. The units are of reasonable quality but some appear in need of refurbishment.	3
Planning factors	White land	
Barriers to delivery	No obvious barriers however no land available for redevelopment.	
Potential uses	B1c	
Timescale/availability	The site is fully occupied and no scope for intensification.	

**Total Score:** **19**

[Scoring: 5 = best, 1 = worst]

## Appendix 5 Definition of B Class Sectors

The method used for re-categorising the 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		31%	
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	61%	0%
Wholesale	0%	21%	79%
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	25%
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	18%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Experian / NLP analysis



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