

Joint Employment Land and Premises Study

Final Report



Halton BC / Knowsley MBC
Sefton MBC / West Lancashire BC

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EXECUTIVE SUMMARY

Introduction

- 1) This study provides an assessment of the quantity and quality of employment land in four of the Liverpool City Region local authority areas – Halton, Knowsley, Sefton and West Lancashire. It identifies the future employment land requirements of these local authorities, which will facilitate local economic growth and support the wider regional economy.
- 2) Key tasks for the study, as set out in the consultant's brief, are:
 - To assess each local authority's economy to inform the amount, location and type of employment land and premises to facilitate development and growth
 - To review the current portfolio of employment land and premises within each local authority area. Minimum threshold sizes of 0.125 ha (sites) and 250 sqm (premises) were set for Knowsley, Sefton and West Lancashire
 - To recommend future allocations of employment land to maintain each area's economic growth, and if appropriate identify existing employment sites which could be transferred to other uses.
- 3) The study is to contribute to the development of spatial planning policies both at local and strategic level. Its findings will be part of the evidence base for the new Local Development Frameworks (LDFs) and sub-regional proposals relating to the Regional Spatial Strategy (RSS). Where a site is recommended in this study for a particular use, it should not be construed that the site will be allocated for that use. The actual site selection will be through the LDF process.

Policy Context

- 4) In planning for employment land the four local authorities must conform to national and regional guidance handed down from higher levels of government.
- 5) At national level, planning policy guidance notes and statements seek to assist local authority policy makers. Key factors important in deciding on new employment land allocations in LDFs are the provision of sufficient land to meet future business requirements; land readily capable of development; sites well served by infrastructure; locations that are sustainable; connected by public transport.
- 6) Regional policies have important implications for employment land. In terms of quantity RSS at Policy W3, sets out employment land requirements by sub-regional area, through to 2021, and proposes disaggregation to individual local authority area be addressed by the respective sub-regions and 4NW.
- 7) In qualitative terms, an important and long standing regional objective is to restructure the North West economy towards more productive economic, higher value, higher skilled, activities. Employment land has a role to play in this restructuring by providing sites that are attractive to high value sectors.

The Economy

- 8) The study area has a number of socio-economic issues. GVA per capita lags behind the North West average, except in Halton. Manufacturing continues to provide a significant share of employment in Halton, Knowsley and West Lancashire, with above regional and national levels. The reverse is true for Sefton. In all four local authority areas job density figures are below national and regional averages.
- 9) Self employment statistics present a contrasting picture for the study area. Sefton and West Lancashire have above North West averages, whilst Halton and Knowsley are below. Apart from West Lancashire, unemployment levels are high compared to the regional average.

- 10) There is much to do to raise business start-up levels. Only West Lancashire comes close to the regional average. Knowsley's rate is less than half the UK average.
- 11) All four local authority areas are in the upper half of the most deprived in England. Knowsley is 5th; Halton 30th; Sefton 83rd and West Lancashire 141st.
- 12) The study area has proportionately more residents employed in low grade occupations (especially in Knowsley), and less people employment in higher grade occupations, than in the North West and Great Britain.
- 13) The local authorities' published Sustainable Community Strategies seek to redress these socio-economic issues. They target improved GVA per capita; higher levels of people in employment; the generation of greater numbers of VAT business registrations; the delivery of remediated employment land as well as more commercial floorspace.
- 14) During the course of this study the UK has entered a recession. The depth is not known but it is affecting the general economy and property market. Whilst the effects cannot be ignored in the short term, this study is for the LDFs period to 2026. It therefore adopts a longer term view, and although economic growth and property investment is presently constrained. It should revert to longer term averages in the future.

Property Market Sectors

Offices

- 15) In concert with the economic structural shift towards service sector activity, the study area has experienced a growing office market. This has seen some degree of development in each of the four local authority areas, though the scale of provision varies considerably.
- 16) Sefton has a strong public sector occupier dominated town centre market in Bootle. However, there is concern about the large-scale level of outdated multi-storey offices stock.
- 17) In Halton the private sector has largely led the development of an out-of-town office parks market, which is allied to the M56 motorway corridor.
- 18) Knowsley and West Lancashire have the smallest office markets, and as with Halton, these are largely based on out-of-town parks. In Knowsley the concern is that there is only one large prestige office development and this is controlled by a single developer. Opportunity and choice is therefore constrained.
- 19) For the study area, office vacancy rates are 7.6 percent by floorspace and 10.4 percent by number of premises. Sefton, with the largest stock has vacancy rates of no more than 4 percent. West Lancashire, with the least stock, has 11 percent of its floorspace vacant, equating to 15.5 percent of its premises.

Industry and Warehousing

- 20) Manufacturing and distribution/logistics functions are important contributors to the economies of all four local authorities. Demand continues and in terms of quality and quantity there are perceived potential shortages of available, appropriate sites in Knowsley, Sefton and West Lancashire.
- 21) Around 603,000 sqm of industrial floorspace is currently vacant – just over 10 percent of total floorspace stock, and 8 percent of premises. All authorities but Sefton have rates at or above the study area figures. Sefton's vacancy rate for both floorspace and properties is around 5 percent.
- 22) The Port of Liverpool is a key economic driver, not only for the study area but also the whole of the North West. However, it is increasingly constrained with insufficient land to meet projected future needs. Further growth is likely to be difficult without a comprehensive partnership approach between Peel and the public sector. This will include reconciling port-

related functions such as container storage or warehousing, with local authority objectives of improved environments and higher job creation activities.

Existing and Emerging Land Supply

- 23) Local authority databases indicate a headline supply figure of 161 sites totalling 507.42 ha. Halton has the most land (210.02 ha) and the most sites (62). West Lancashire has the fewest sites (20) and the least land of the four areas (69.90 ha).
- 24) There are potential shortages when assessed against the known level of supply; historic take-up trend data; economic forecasts and local authority aspirations for future economic growth. Office land is lacking in Widnes, Knowsley and Skelmersdale. Industrial land is in short supply in Runcorn. Both types of land are lacking in North Sefton and West Lancashire (outside Skelmersdale).
- 25) Nevertheless all four local authority areas meet the RSS requirement of having at least 30 percent of the supply deemed as being available within 3 years.
- 26) All four local authorities are at risk of losing land from their headline land supply. For Halton the loss is around 31 ha. For Sefton it is 13 ha and for West Lancashire the figure is 10 ha. Knowsley is the least affected, less than 6 ha. Consequently the realistic land supply figure for the study area reduces to 446.90 ha.
- 27) The vast majority of this available land supply represents undeveloped sites within the 92 employment areas assessed as part of this study. Assessment suggests there is some 290 ha of land associated with these areas with scope to recycle or intensify development, as part of regeneration or remodelling opportunities. This is distributed across all four local authority areas.
- 28) Both the SHLAA and Call For Sites processes demonstrate pressure for alternative higher value uses on allocated or existing employment sites and existing employment areas. This pressure appears to be greatest in Sefton.
- 29) The assessment of sites put forward identifies scope for the release of employment land in all four local authority areas. Some is already occurring through the grant of residential planning consents. Much of the land that could be de-allocated relates to existing employment areas.
- 30) In Halton, Knowsley and West Lancashire the Call For Sites process has brought forward potential employment areas that could deliver new allocations to meet need during the LDF period. Most will however require removal from current Green Belt designations. For Sefton the situation is one of defending the existing employment land resource.

Employment Land Forecasts

- 31) The different approaches used to quantify new employment land requirements produce significantly varying results.
- 32) Oxford Economics' forecasts, which relates to labour supply projections, employment sector change and public sector economic development strategies, suggest a need of only 38 ha of additional land for the whole of the study area, over the LDFs period. This disguises increased need for office and warehousing uses being offset by reduced need for manufacturing.
- 33) The Oxford Economics forecasts represent the absolute minimum amount of land needed. This is because they make no allowance for local market churn, nor the need for a choice of sites and premises to offer sufficient opportunities for businesses at different stages of their life cycle. Also the forecasts assume industry sectors which yield a forecasted negative employment change will not generally form a need for additional land. Yet there will be businesses in those sectors that will want more space.

- 34) The economic forecasts presume job floorspace densities and development ratios will remain unchanged into the future. But, should employment densities fall due to productivity growth within manufacturing, then a greater amount of manufacturing employment land will be required.
- 35) Furthermore, for most locations in the study area new office developments are being focused in business parks, not town centres. This means floorspace and site densities will replicate those of existing development, rather than deviate from them.
- 36) Nor do the economic forecast figures have reference to the level and nature of existing employment land supply.
- 37) In contrast the use of historic trend data projects a need for almost 300 ha in addition to the 2008 base supply figure of 507 ha. This includes the provision of a buffer of employment land, which is additional to the indicative requirements identified from the forecast models. The figure aligns with the Regional Employment Land Study (RELS) 20 percent buffer, in order to maintain a choice (by quality, size, type and location) of sites on a continuing basis beyond the 2026 LDFs end date.
- 38) A caveat for rolling forward historic trends of take-up is that these may be skewed by significant development levels in certain years. Whilst there is some evidence of particularly productive years, and differing impacts at individual local authority area level, the study area as a whole sees only a marginal difference in the annual take-up at short (5 years), medium (10 years) and long term (16 years) trends. All are circa 37 ha per annum.
- 39) The undersupply of employment land in the study area more than doubles to over 650 ha when RELS figures are disaggregated and adjusted to allow for a 2026, rather than 2021, end date.

Conclusions

Economic Profile

- 40) In general the study area shows signs of below average economic performance, reflecting the experience of the wider Liverpool City Region. In terms of economic activity there is a slightly higher proportion of manufacturing employment than both the regional and national averages, but significantly more in public administration, education and health.
- 41) There will be need to further diversify the local economies towards office and service-based uses, in line with wider trends and forecast, if local employment is to be maintained. Also, a need to respond to higher-level public sector agency plans and local initiatives, which are seeking to directly address economic issues.
- 42) The study area figures mask contrasts at the level of the four local authority areas. Key ones are summarised in Table ES1.

Table ES1 – Economic Profile Contrasts at Local Authority Level

Topic	Comment
Low Job Density	Only Halton matches North West rate of 0.80. Others are lower with Knowsley being only 0.64
Self Employment Rates	Halton and Knowsley substantially below regional and national averages. Sefton and West Lancashire are above regional figure of 7.7 percent. West Lancashire also better than UK figure of 9.3 percent
Unemployment Rates	West Lancashire at 2.5 percent is less than half the NW and UK figures. Bleaker picture for the other areas, with Knowsley having 8.3 percent rate
Business Start-Ups	All lag behind NW and national rates. Knowsley figure of 17 is less than half the national rate. West Lancashire performs best at 29 VAT registrations per 10,000 resident adults

Topic	Comment
VAT Stock Data	West Lancashire's ratio of 1:25 population betters the NW and matches the UK figure. Knowsley at 1:61 has the worst figure in the NW
Economically Active (proportion of working age population)	Sefton and West Lancashire at or above NW 76.5 percent rate. Halton and Knowsley are below
Indices of Multiple Deprivation	Knowsley is the 5 th most deprived area in England. Halton is 30 th , Sefton is 83 rd and West Lancashire is 141 st
Working Age Population Qualifications	Over 26 percent in Knowsley lack qualifications. In Sefton it is 15 percent (slightly better than the NW 15.8 percent figure)
Employment Structure	Manufacturing represents 22.2 percent in Knowsley but only 6.3 percent in Sefton. Halton and West Lancashire also exceed the national average of 10.9 percent. Distribution and public administration represent 64 percent of Sefton's employment. For Halton the figure is only 40 percent

Source: BE Group 2009

Property Market Assessment

- 43) The industrial market is viewed as stronger than that for offices. Demand for industrial premises is at a level almost twice that for offices. This is true for all four local authority areas.
- 44) The industrial market remains concentrated in the long established industrial areas (South Sefton, Widnes, Knowsley Industrial and Business Parks) and the former New Towns of Runcorn and Skelmersdale.
- 45) Whilst Halton (M56 corridor, Runcorn) and Sefton (Bootle town centre) have achieved critical mass office markets, for Knowsley and West Lancashire there is still need to establish stronger credentials.
- 46) A consistent theme of demand for industrial and office premises, and sites, is the emphasis on the lower end of the size scale. Across the study area there is concern that more provision is needed in terms of business incubation, managed workspace and grow on premises for start up businesses.
- 47) Measured against a market equilibrium vacant property rate of 7.5 percent, all local authorities but Sefton have an oversupply of both industrial and office properties. Sefton has current vacant stock levels substantially below the equilibrium rate.

Current Land Availability

- 48) The current potential land resource amounts to 507.42 ha, located across 161 sites. Halton and Knowsley each have more than one third of the sites, translating into the largest shares of the available land. Halton has 41 percent, Knowsley 31 percent, with Sefton and West Lancashire each having 14 percent of the supply.
- 49) 60 percent of the sites are small, being less than 2 ha in size. Over two thirds of Sefton's sites fall into this size bracket.
- 50) There is a good mix of office and industrial land across the study area, a reflection of the case in each local authority area. Overall quality is good. Around 75 percent are relatively well connected in terms of accessibility.
- 51) Only 16 percent of the land supply is currently being actively marketed. Another 12 percent is assessed as available, but not marketed. Only Sefton has more readily available, than unavailable land. The lack of available land is most acute in Halton and West Lancashire.
- 52) 29 percent of the study area's sites (18 percent of the land supply) are potentially constrained and unavailable. This is due to retention of expansion land; being too costly to remediate;

already in use; aspirations for alternative uses. Excluding all but expansion land reduces the supply figure to 446.90 ha. All four areas are affected, with around 20 percent of Sefton's land supply at risk.

- 53) 92 established Employment Areas have been assessed as part of the review of land supply. They total just under 3000 ha, with some 15 percent (443.85 ha) still available and 10 percent (289.64 ha) considered as appropriate for regeneration or remodelling. Over half the latter is in Halton. The remainder is distributed approximately equally between the other three local authority areas.
- 54) The assessment has found that two Employment Areas and two Rural Employment Sites (all in West Lancashire) and two Opportunity Sites (Sefton) are considered to be no longer fit for purpose for employment use.

Providing For Structural Change

- 55) For Halton the sites portfolio is equipped (or in the case of Widnes Waterfront, being transformed) to accommodate the Liverpool City region growth sectors. Knowsley needs to continue remodelling Knowsley Industrial and Business Parks, and to bring forward a successor to Kings Business Park, if it is to compete effectively in attracting investment from the growth sectors.
- 56) The Dunningbridge Road corridor regeneration in South Sefton is providing appropriate opportunities. In North Sefton, Southport Business Park is geared to accommodating some of the growth sectors, but there will be need for a successor site during the LDF period. If suitable opportunities cannot be identified in east Southport, it may require delivery through land in West Lancashire.
- 57) West Lancashire needs to have continuing site provision in Skelmersdale and Burscough if it is to attract growth sectors' investment.

Land Need Forecasts

- 58) The study area land requirements calculated from the different forecast models applied are set out in Table ES2.

Table ES2 – Land Need Forecasts – Alternative Models

Model	Land Need 2008-2026 ha Surplus (Deficit)	
	Headline Supply 2008 507.42 ha	Realistic Supply 2008 446.90 ha
Trend Based Forecast of Land Take-up	(297.70)	(358.14)
Oxford Economics Forecast	(38.04)	(38.04)
RELS Forecast – 1 (*)	(652.37)	(740.58)
RELS Forecast – 2 (**)	(705.16)	(793.37)
Company Survey Impact	(110.08)	(170.60)

Source: BE Group 2009

* Reflects adjustment of actual take-up 2005-08 plus RELS/RSS Annual Take-Up Rate for 2021-26. From Table 126

** Reflects adjustment of actual take-up 2005-08 plus Long Term Take-Up Rates uplifted in line with RELS/RSS, for 2021-26. From Table 126

- 59) The global shortage from the trend based forecast, when broken down to individual local authority area, shows that only Sefton does not have a significant potential shortfall of land.
- 60) The local authority area requirements have been adjusted to take account of known intervention schemes; the implications of applying a market equilibrium rate of 7.5 percent to the current industrial property vacancy rates; de-allocations proposed or required from the

Employment Areas assessment and review of the SHLAA/Call For Sites process. The consequences are set out in Table ES3.

Table ES3 – Trend Based Forecast of Land Take-up – Additions/Deductions Adjusted

Area	Overall Land Requirement (from Table 142), ha	Additions (Deductions), ha	Adjusted Figure, ha
Halton	+133.61	(17.37) Oversupply based on 7.5 percent vacancy rate for industrial property 17.38 Land lost to Mersey Gateway Bridge development 14.00 Lost to Mid-Mersey Growth Point Bid housing at Runcorn Docks	+147.62
Knowsley	+123.83	(21.77) Oversupply based on 7.5 percent vacancy rate for industrial property 8.79 De-allocations in south Prescot Action Area	+110.85
Sefton	+7.66	5.34 Undersupply based on 7.5 percent vacancy rate for industrial property 20.25 Land lost to Newheartlands HMR 6.47 Proposed De-allocations from Employment Areas Assessment 0.29 Proposed De-allocations from CFS Assessment	+40.01
West Lancashire	+93.04	(5.82) Oversupply based on 7.5 percent vacancy rate for industrial property 4.04 Proposed De-allocations from Employment Areas Assessment	+93.09

Source: BE Group 2009

- 61) All four local authorities need to replace any land lost to alternative uses, as well as expand the overall supply of employment land over their LDF period. Sefton need to be cautious in considering the release of sites for non-employment uses, as recent take-up has been below the longer term trend, and this has been influenced by the lack of viable opportunities rather than reduced demand.
- 62) The Employment Areas assessment has identified scope for regeneration or remodelling across all four local authority areas. If all the opportunities were capitalised on, then this would meet 33 percent of Knowsley's, and 57 percent of West Lancashire's adjusted need. For Halton and Sefton the potential regeneration areas exceed the additional land requirement.
- 63) The Call For Sites submissions include potential new allocations of a scale to address the Knowsley and West Lancashire shortfalls. However, this will require amendments to existing Green belt boundaries.

Recommendations

Employment Land Supply

1. Notwithstanding the wording of RSS Policy W3, Halton Borough Council should include the 3MG sites within its employment land portfolio, and formally notify 4NW of this. Also that this is recognised in discussions relating to Halton's disaggregated figure for the sub-region.
2. That the economic forecasts are not used as the basis for defining land provision for the LDFs period, as in reality a much larger scale of employment land provision will be required to ensure continuing economic restructuring and growth, and an appropriate sites portfolio, particularly if the long term development rates are to continue into the future.
3. That the local authorities do not set RSS/RELS disaggregated figures as the basis for the LDFs employment land forecasting, because of the challenging additional provision required. And discussions with 4NW commence urgently, as the figures would pose a serious challenge to the evidence base that must support the LDF documents.
4. The local authorities adopt a realistic land supply figure of 446.90 ha as the April 2008 base figure against which future adjustments and monitoring is made. This disaggregates to:

Halton	178.94 ha
Knowsley	151.14 ha
Sefton	57.36 ha
West Lancashire	59.46 ha
5. The local authorities maintain a buffer zone of at least four years historic take-up. This aligns with Employment Land Review guidance for the need to allow scope for churn and to offer range and choice. It also accords with RSS/RELS supply forecast calculations.
6. The local authorities adopt the worst case scenario that all potential land losses identified in the study actually do occur.
7. The regeneration/remodelling opportunities identified from the Employment Areas assessment are used as the basis for future further investigation, encouragement and prioritisation to ensure employment land provision is maintained.
8. Reflecting the current economic recession, but based on expectations that the economy will recover by 2011, the employment land forecasts reflect a reduction of 80 percent in the take-up rate for a three year period to 2011.
9. Additional employment land need reflects the trend based forecast of land take-up; includes a 20 percent buffer to allow for supply post 2026, and is adjusted to take account of known intervention schemes. The study area total is therefore considered to be 389.74 ha, split to:

Halton	147.62 ha
Knowsley	110.85 ha
Sefton	40.01 ha
West Lancashire	91.26 ha
10. Existing employment land provision is rationalised by de-allocating 12 sites (10 in Halton, 1 each in Knowsley and West Lancashire), now committed or approved for non-employment uses. Also, two heavily constrained allocations in Halton should be re-assessed, and if found unviable should also be de-allocated. These 14 sites are identified in Tables 146 and 147 of the full report.
11. The four local authorities' planning policy presumption should be against change from employment use, unless this fits with 'policy on' initiatives at the particular location, or the site is no longer considered fit for purpose.
12. From the SHLAA/Call For Sites submissions:
 - Halton consider either or both the Manor Farm (Moore) and Marsh Gate Cottage (Manor Park) sites to expand Manor Park

- Halton undertake detailed examination of the feasibility of bringing forward sites at Rocksavage, Cholmondeley Road and Pavilions, Sandy Lane (all Runcorn)
- Knowsley considers an area search for a substantial new B1, B2, B8 use site to the north east of junction 6, M62 at Windy Arbor Road, Whiston
- Knowsley considers the allocation of land at Knowsley Land Farm as a successor site for Kings Business Park
- Knowsley considers the southward extension of Knowsley Business Park through CFS submissions associated with Knowsley Lane and School Lane
- Sefton strongly protect the existing land and premises resource, especially in North Sefton where the shortages are most acute. None of the allocated employment sites should be considered for alternative uses
- Sefton release for non-employment uses those sites identified at paragraph 11.70 of the report
- West Lancashire to consider five areas of search identified at Burscough Industrial Estate; Stanley Industrial Estate; Banks; Scarisbrick and Tarleton.

13. All four local authorities should review their employment land portfolio at intervals of three years.

Spatial Implications

14. All four local authorities make provision for more quality employment land to deliver the sites and premises to accommodate the economic shift towards office and service-based uses. These should be primarily located in the study area's established population centres.
15. Peel Ports, Sefton, Liverpool, Wirral and Knowsley collectively address the spatial and planning policy issues that are constraining future growth of the Port and its function as a key regional economic driver.
16. Halton pursue the production of port masterplans for Runcorn Docks and Port Weston, to establish the extent of landholdings to be protected for port-related activity, before further decisions are made on the release of sites to other uses.
17. Planning policy adopts a twin track approach that continues to facilitate new office development at established and/or sustainable out of centre locations, as well as in town centre locations. In doing so the local authorities are recognising that office based activity comprises requirements that do not fit to a single location solution.
18. In response to the shortage of employment land and premises in North Sefton, Sefton should through its planning policy presume to retain the 'backland' sites associated with residential areas in Southport, particularly East Birkdale. Although individually small, collectively they provide an important economic resource. Sefton will have to balance this against conflicting pressures of the contribution to the longer term housing supply, as it takes forward its Core Strategy.
19. Sefton ensures a balanced approach with employment opportunities protected in the HMRI area for the existing and new population. This will ensure HMRI communities are economically viable and sustainable.
20. All four local authorities consider the following approaches to ensure there is continuing employment land provision:
- Work with other public sector agencies who have employment land holdings, to set a programme for bringing these to the market in a remediated condition
 - Where justified, allow mixed-use development to fill the financial gap created by reduced public sector grant provision.
21. Knowsley and West Lancashire should re-examine the justification for a more flexible response to changes to the Green Belt to facilitate new employment land development.

22. Knowsley targets the provision of a successor development to Kings Business Park, for the second half of the LDF period. The most appropriate location would be Knowsley Lane Farm, although this is currently located within the Merseyside Green Belt.
23. Each local authority undertakes a more detailed appraisal of supply and demand for managed workspace and serviced offices within its area. This should ensure there is an appropriate range of space in the correct locations, e.g. Burscough, Ormskirk, Skelmersdale, Widnes, Southport, Formby, Bootle, Huyton and Prescot.
24. Given the strength of continuing demand for freehold industrial units, sites should be set aside to provide small freehold development plots for owner-occupiers. These could comprise up to 2 ha, initially providing 5 to 10 plots, 0.1-0.2 ha in size. West Lancashire should pursue this with Lancashire County Council for their land in Skelmersdale. Halton should consider similar provision within its Widnes Waterfront landholdings. Knowsley should examine scope at Knowsley Industrial Park.
25. Knowsley and West Lancashire require more small business workshops in the range up to 300 sqm. Both leasehold and freehold premises are needed. For offices the need, across all four local authority areas, is for premises of 101-200 sqm and above 500sqm.

External Influences

26. In view of the evidence of this report regarding the challenges produced by disaggregation of the RSS/RELS sub-regional employment land supply figures, the four local authorities (and 4NW) need to address this issue, and achieve complementarity with their neighbouring authorities. This means:
 - Halton, Knowsley and Sefton engaging in discussions with Wirral, Liverpool and St Helens
 - Halton engaging in discussions with Warrington and Cheshire West and Chester
 - West Lancashire engaging in discussions with Wigan and the three Central Lancashire authorities.
27. Paragraph 6.12 of the RSS states that the Regional Planning Body (4NW) will facilitate this approach.

1.0 INTRODUCTION

- 1.1 This report assesses the supply, need and demand for employment land and premises (Use Class B) in the four local authority areas of Halton, Knowsley, Sefton and West Lancashire. It has been carried out on behalf of the local authorities (the Councils).
- 1.2 It has been commissioned to provide robust evidence to underpin and inform the emerging Local Development Frameworks (LDFs), which the Councils are currently preparing. These will replace the existing Unitary Development and Local Plans, and will cover the period to 2026. Although this report contains suggestions of sites that may be able to assist in meeting the identified shortfall in employment land provision, the actual site selection will be through the LDF process. The base date for data is 1 April 2008.
- 1.3 This report considers whether sites within the Green Belt will be required to ensure that each district is able to meet their requirement for employment land; this study does not form part of a review of the Green Belt boundary. The Regional Spatial Strategy (RSS) states that there is no need for any exceptional substantial strategic change to Green Belt and its boundaries within Cheshire, Lancashire or Merseyside before 2011. After 2011 the presumption will be against exceptional substantial strategic change to the Green Belt. This study will not prejudice the findings of any future reviews of the Green Belt which may be undertaken.
- 1.4 Although West Lancashire remains a Borough Council within Lancashire, it is now considered a component of the Liverpool City Region. As such, the Greater Merseyside local authorities of Halton, Knowsley and Sefton invited West Lancashire to participate in this combined areas' study.
- 1.5 BE Group, an economic development and property consultancy based at Ingot House, Kelvin Close, Birchwood, Warrington, WA3 7PB, has compiled this report. BE Group has called upon Oxford Economics for economic forecast data pertinent to each of the local authority areas.
- 1.6 There are three main elements to the study:
- An assessment of each local authority's economy to inform the amount, location and type of employment land and premises required to facilitate development and growth

- A review of the current portfolio of employment land and premises within each local authority area. Minimal threshold sizes of 0.125 ha for sites and 250 sqm for premises, were set for Knowsley, Sefton and West Lancashire
- Recommendations on the future allocations of employment land and premises to maintain each area's economic growth.

1.7 In addition to the general study requirements a number of additional objectives were identified by individual local authorities. These are summarised in Table 1.

**Table 1 – Joint Employment Land and Premises Study 2008
Specific Local Authority Requirements**

Area	Requirements
Halton	<ul style="list-style-type: none"> • disaggregation of need and supply for the towns of Widnes and Runcorn • 19 Primarily Employment Areas identified, together with 2 Regional Investment Sites, at Appendix B of the brief, to be assessed • consider employment land implications of the proposed Mersey Gateway Bridge • consult with chemical industry operators regarding future business aspirations • initial consultations with Stobart Group regarding Port Weston proposals • any additional employment land requirements as a consequence of Runcorn Docks redevelopment • implications of the Omega development on Halton's employment land requirements • the potential for locating a recycling and recovery park.
Knowsley	<ul style="list-style-type: none"> • comprehensive review of Kings Business Park and the potential need for a successor site • review employment sites in, or neighbouring residential areas, that may be under pressure for future use • disaggregation of need and supply between Knowsley Industrial Park; Knowsley Business Park; Prescot and Huyton Business Park • assess potential for small scale employment or mixed uses within UDP Action Areas • dialogue with Ford/Jaguar to establish future intentions for Halewood landholding
Sefton	<ul style="list-style-type: none"> • disaggregation of need and supply to levels of North Sefton (Southport/Formby) and South Sefton • an overview of quantity and quality of office premises in Bootle Central Area and Office Quarter and Southport Central Area • take account of the relocation and displacement of employment land and premises arising from the Housing Market Renewal Programme • dialogue with the Port of Liverpool regarding operational land requirements
West Lancashire	<ul style="list-style-type: none"> • disaggregation of data for Skelmersdale, from the rest of the district • consider re-use opportunities for former manufacturing sites in Skelmersdale • assess rural employment and 'isolated' sites in urban locations that

	are under pressure for residential use, including potential mixed-use regeneration.
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Source: *Joint Employment Land and Premises Study Brief, 2008*

- 1.8 Subsequent to the appointment of BE Group it was agreed that the examination of a waste recovery and recycling park in Halton be excluded from the study. This was because the topic is separately considered in conjunction with the Merseyside Joint Waste Development Plan Document.

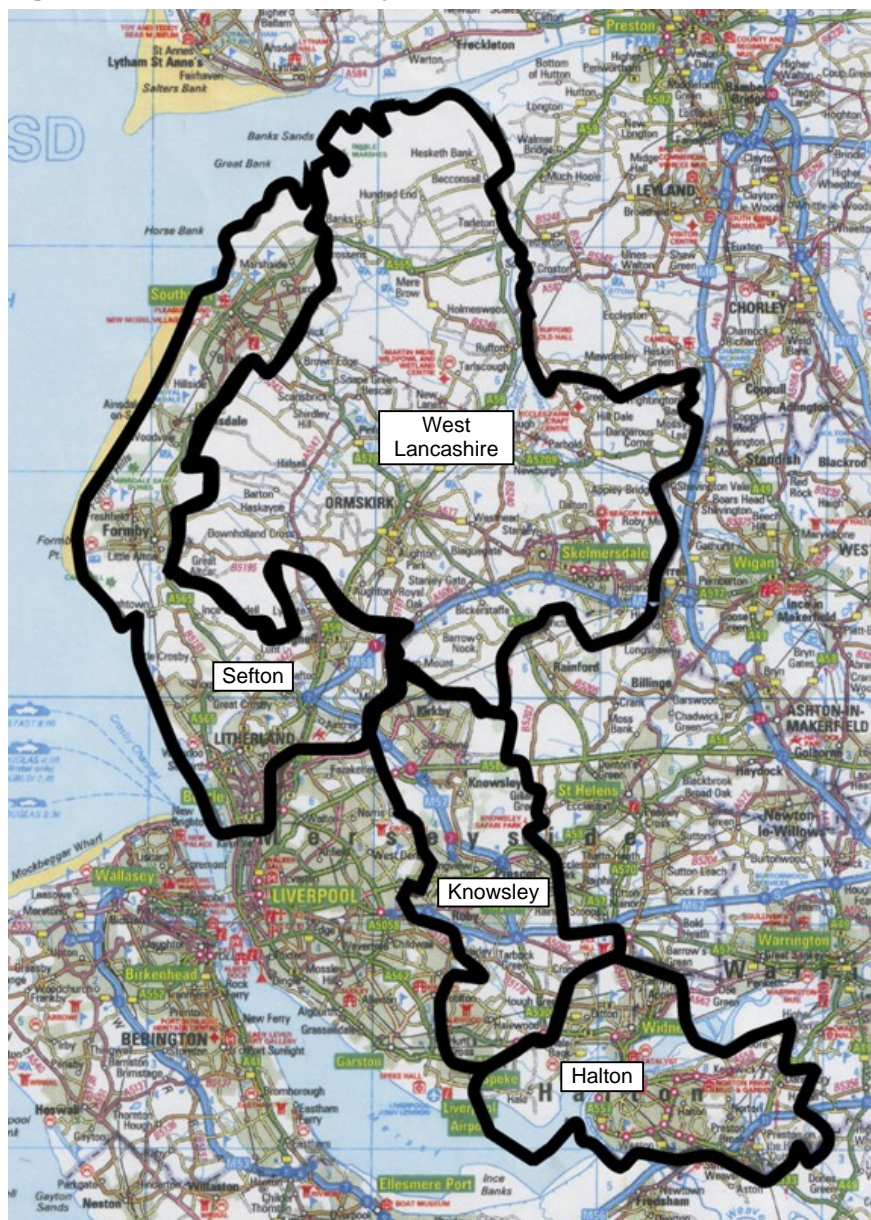
Methodology

- 1.9 There is a statutory obligation to consult key stakeholders within the local community as part of the LDF preparation, and this has been reflected in our methodology.
- 1.10 A number of research methods have been used in the compilation of data for this study. They include site visits, face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents.
- 1.11 Consultation has also been undertaken with various arms of the public sector agencies with responsibility for the four local authority areas.
- 1.12 A full list of the consultees is included in Appendix 1.
- 1.13 All land area figures in the report are gross figures, unless otherwise stated.

Study Area

- 1.14 The four local authorities of Halton, Knowsley, Sefton and West Lancashire collectively cover approximately 256 sq miles (66,565 ha), with a population of 656,400 (ONS mid-year population estimates, 2007). All are included within the Liverpool City Region, as defined by the North West of England Plan Regional Spatial Strategy to 2021. Administratively however West Lancashire remains a district authority within Lancashire.

Figure 1 – Location of Study Area



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- 1.15 West Lancashire has contiguous boundaries with two other city regions – those of Manchester and Central Lancashire. Halton also abuts the Cheshire and Warrington Economic Alliance sub-region.
- 1.16 A number of key transport corridors pass through the area covered by the four local authorities. The M56, M57, M58 and M62 motorways serve parts of the area, providing connections to the M6 corridor. Key A-road routes include the A56, A570, A59, A561, A565, A580 (East Lancashire Road) and A5036 (Seaforth Port access road). Passenger rail services include the Liverpool branch of the West Coast Mainline (serving Runcorn); Merseyrail services to Southport (Sefton), Kirkby (Knowsley) and Ormskirk (West Lancashire); Transpennine routes (serving North

Halton and Huyton, Knowsley); as well as local services to Chester, Warrington and Manchester (from Runcorn), to Preston (from Ormskirk), Greater Manchester (from Sefton, Huyton and Kirkby (Knowsley) and West Lancashire). There are rail freight facilities at Ditton (Halton) and Knowsley Industrial Park.

- 1.17 Sefton contains major port facilities, centred on Seaforth. Further port facilities, linked to the Mersey and Manchester Ship Canal, are sited in Runcorn.

Employment Land Review: Guidance Notes (ODPM, 2004)

- 1.18 Government guidance covering employment land reviews promotes a three-stage process, and provides the framework for this report.
- 1.19 Stage One: take stock of the existing situation including an initial assessment of 'fitness for purpose' of existing allocated employment sites. The objective is to identify the best employment sites to be protected; identify employment sites to be released and prepare an effective brief for stages two and three of the review. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
- 1.20 Stage Two: understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of 'gaps' in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the LDFs' period and an analysis of the likely 'gaps' in supply that need to be filled.
- 1.21 Stage Three: entails a qualitative review of all significant sites (and premises) in the existing portfolio in order to; confirm which of them are unsuitable for/unlikely to continue in employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. The outcome will be the completion of the employment land review, to be taken forward in the LDF.
- 1.22 This report is the Joint Employment Land and Premises Study for the combined areas of Halton, Knowsley, Sefton and West Lancashire, prepared in compliance with this advice.

2.0 CONTEXT REVIEW

Introduction

2.1 This section of the report summarises the key issues emerging from a detailed context review of planning guidance at the national, regional, sub-regional and local level, impacting on employment land provision in the four Councils' areas.

2.2 Appendix 2 schedules all the documents that have been analysed.

2.3 The main issues and policy considerations emerging from this analysis are summarised in this section on a topic-by-topic basis. Some are referred to in more detail in subsequent sections of the report. A full policy/strategy appraisal is provided in Appendix 3, and a comprehensive review of background reports in Appendix 4.

2.4 This study is only concerned with B1, B2 and B8 use classes. The following definitions are set out in the Town and Country Planning (Use Classes) Order 1987 (including Amendments):

- B1 Business (a) Offices not within A2
(b) Research and development, studios, laboratories, high-technology
(c) Light industry
- B2 General Business General Industry
- B8 Storage or Distribution Wholesale warehouse, repositories

Employment Land Provision

2.5 The Unitary Development Plans (UDPs) for Halton, Knowsley and Sefton, and the West Lancashire Replacement Local Plan set aside the levels of land for employment use across each local authority area. Together they total 593.2 ha (see Table 2) for the period 2001 to 2016.

Table 2 – Employment Land Allocations/Sites with Planning Permission 2001-2016

Local Authority	Area, ha
Halton	214.34
Knowsley	164.80
Sefton	88.10
West Lancashire	125.96
TOTAL	593.20

Source: Halton, Knowsley, Sefton UDPs; West Lancashire Replacement Local Plan

- 2.6 There is no consistent approach on how land allocations are presented in the four Plans. For example West Lancashire translates vacant premises into a land area that is included in its total allocated supply. It is the only authority to do this. Knowsley and West Lancashire identify land with existing planning consents, but Halton and Sefton do not. Halton differentiates its Regional Investment Sites' allocations from its local employment sites. Sefton makes reference to the allocation of up to 65,650 sqm of office space in Bootle Town Centre. But this is not translated to a land take, and is therefore excluded from the 88.10 ha total.
- 2.7 Only Knowsley (10.19 ha) and Sefton (5.6 ha) make reference to annual employment land take-up rates that have been taken into consideration in determining forward supply.
- 2.8 The Inspector's Report into the West Lancashire Replacement Local Plan (2005) reviewed the allocation of 145 ha of employment land under Policy DE5. The Inspector noted that this allocation was in line with targets set within the Lancashire Structure Plan. It also met (and possibly exceeded) likely needs to 2011, based on historic take-up rates. For this reason, the Inspector concluded that the release of Green Belt land for employment uses was not required, and that policy should focus on promoting the recycling of brownfield sites in established industrial areas. Consequently, proposed extensions to Pimbo and White Moss employment areas (20 ha) were excluded from the Local Plan allocations, and the total reduced to 125.96 ha (the figure shown in Table 2). West Lancashire was therefore unable to fulfil its Structure Plan requirement.
- 2.9 The 2008 Local Development Framework (LDF) Annual Monitoring Reports produced by the local authorities provide details of employment land area availability at 1 April 2008. The situation of available designated employment land in each local authority

area, as at the 1st April 2008, is summarised in Table 3. In total 504.18 ha of the Plan allocations remained available.

Table 3 – UDP/Local Plan Employment Land Allocations – Availability, April 2008*

Local Authority	Allocated Land Available, ha
Halton	210.02
Knowsley	157.00
Sefton	73.99
West Lancashire	63.17
TOTAL	504.18

Source: LA Annual Monitoring Reports, 2008

* Includes sites under construction

- 2.10 Analysis of the Annual Monitoring Reports suggests that there has been a relatively low level of loss of employment land to alternative uses. Where employment land has been lost it has usually reflected individual properties/sites outside the main employment areas.
- 2.11 Halton lost a total of 1.03 ha in 2007/08 to residential development representing three sites, two in Widnes and one in Runcorn. In the previous year the figure was 1.5 ha. Knowsley and West Lancashire recorded no losses in the year. Sefton lost 2.53 ha, of which residential consents took up 2.40 ha. By comparison with this combined loss of 3.56 ha during 2007/08, over 34 ha of employment development was recorded as taken up across the four authority areas (see Table 4).

Table 4 – Employment Land Take-up 2007-08

Local Authority	Take-Up, ha
Halton	24.59
Knowsley	6.88
Sefton	1.64
West Lancashire	1.44
TOTAL	34.55

Source: LA Annual Monitoring Reports, 2008

- 2.12 The baseline data for assessing land availability for this study is set at 1 April 2008. As a start point for Halton and West Lancashire, BE Group utilised the Councils' published Employment Land Monitoring Reports, which are based on 1 April 2008

figures. The Halton figures include seven sites within the boundaries of the 3MG intermodal freight terminal. The number of sites for West Lancashire has been increased to 20, to reflect BE Group's research that sites at Stanley Industrial Estate have been subdivided. This is further explained in paragraph 5.127.

- 2.13 The 2008 Annual Monitoring Reports, produced by Knowsley and Sefton, showed sites data which differed from the original figures provided for this study. BE Group also established a variation in West Lancashire's sites areas. Consequently, to ensure consistency, this study uses data established through an analysis of all employment sites identified on the four Councils' GIS databases. Details of the land supplies are set out in Appendix 4. Table 5 draws together the figures on an authority by authority basis.

Table 5 – Employment Land Availability – April 2008

Local Authority	Number of Sites	Area, ha	Total UDP Employment Allocations, ha
Halton	62	210.02	214.34
Knowsley	54	156.77	164.80
Sefton	25	70.73	87.10
West Lancashire	20	69.90	74.47
Total	161	507.42	540.71

Source: BE Group 2009

- 2.14 BE Group has disaggregated the Table 5 land availability figures to show splits between likely use classes; greenfield or brownfield provision and location (urban/urban fringe/rural). It should be noted that use class designations are derived from either established planning consents; landowner aspirations or reflection of adjacent uses. For some there will be a range of options rather than one specific use class identification.
- 2.15 Tables 6-8 summarise the position for each local authority. Appendix 37 provides detailed schedules on a site by site basis.

Table 6 – Employment Land Availability by Use Class, ha

Local Authority	Office B1(a)		High Tech B1(b)		Light Industry B1(c)		General Industry B2		Warehouse B8		Industrial/warehouse (B1(c), B2, B8)		Industrial/office/warehouse (B1(a, c), B2, B8)	
	Number of Sites	Area, ha	Number of Sites	Area, ha	Number of Sites	Area, ha	Number of Sites	Area, ha	Number of Sites	Area, ha	Number of Sites	Area, ha	Number of Sites	Area, ha
Halton	15	43.02	5	16.65	11	7.46	4	10.03	7	81.87	9	29.90	11	21.09
Knowsley	6	12.41	0	0.0	8	4.49	3	21.42	3	9.50	18	36.99	16	71.96
Sefton	7	18.50	0	0.0	4	2.68	0	0.0	0	0.0	4	6.52	10	43.03
West Lancashire	5	19.71	0	0.0	1	0.47	0	0.0	2	17.34	10	22.32	2	10.06
Total	33	93.64	5	16.65	24	15.1	7	31.45	12	108.71	41	95.73	39	146.14

Source: BE Group 2009

- 2.16 As shown in Table 6, Halton has almost half the available office land (B1(a)) and all of the sites suitable for high technology/science (B1(b)) uses. Halton also has approximately half the land suitable for light industrial (B1(c)) uses. This includes five sites of less than 0.2 ha, which are too small to support general industry or warehouses.
- 2.17 21 percent of the available land area (108.71 ha) is suitable for warehouse (B8) uses only. This is focused at specialist freight/warehousing facilities, including 3MG, Widnes; Knowsley Chemical Industry Site, Knowsley Industrial Estate; and XL Business Park, Skelmersdale.
- 2.18 58 percent of the available land area cannot be easily assigned a use class. This comprises sites of varying sizes, without planning permissions or clear owner intentions, which could be brought forward for the full range of industrial/warehouse uses (B1(c), B2, B8) or office/industrial/warehouse uses (B1(a, c), B2, B8). Approximately 70 percent of the land supply for Knowsley and Sefton remains available for such a range of uses.

Table 7 – Greenfield/Brownfield Employment Land Provision

Local Authority	Greenfield Land		Brownfield Land	
	Number of Sites	Area, ha	Number of Sites	Area, ha
Halton	19	96.63	43	113.39
Knowsley	15	45.12	39	111.65
Sefton	0	0.0	25	70.73
West Lancashire	11	49.79	9	20.11
Total	45	191.54	116	315.88

Source: BE Group 2009

- 2.19 The majority of available land in Halton and Knowsley is brownfield (see Table 7). All Sefton's sites fall into the brownfield land category. West Lancashire has a higher greenfield provision due to the availability of expansion sites in Stanley Industrial Estate and XL Business Park, Skelmersdale that have not been developed previously.

Table 8 – Employment Land Location

Local Authority	Urban		Urban Fringe		Rural	
	Number of Sites	Area, ha	Number of Sites	Area, ha	Number of Sites	Area, ha
Halton	36	90.65	25	118.84	1	0.53
Knowsley	10	38.93	44	117.84	0	0.0
Sefton	20	52.99	5	17.74	0	0.0
West Lancashire	4	8.24	13	57.31	3	4.35
Total	70	190.81	87	311.73	4	4.88

Source: BE Group 2009

- 2.20 In Halton, 58 percent of the available employment sites are in urban areas, however, 55 percent of the available land area is in urban fringe employment areas such as Daresbury Park. In Knowsley the majority of available land is in Knowsley Industrial and Business Parks, on the periphery of Kirkby. In Sefton three quarters of the available land area is in the Bootle and Southport urban areas. Only West Lancashire has any significant employment land availability in rural areas, with three sites at Burscough Industrial Estate.

Quality of Employment Land

- 2.21 The context review has revealed that there is a perceived lack of quality employment land, at least in parts of the study area. The findings of the Mersey Belt Study (NWDA 2002) reinforce the poor quality assessment for land in Knowsley and Sefton, and to a lesser degree Halton.
- 2.22 The Mersey Belt Study identified 40 key sites as being suitable for knowledge based industries. A quarter of the sites were classed as 'Category A', in which public sector investment needs to be made to improve accessibility, infrastructure and image. The remainder, 'Category B' sites, generally have a lower need for public investment. Only 3 of the 40 key sites lie within the study area. These are Daresbury Park and Manor Park IV, both in Halton, and Kings Business Park, Knowsley.
- 2.23 In addition mention is made of Daresbury Science and Innovation Campus as a location that could support the life sciences and medical technology sectors. Also mention is made of Cronton Colliery (Knowsley) as one of two sites that, whilst suitable to meet the requirements of the target industry sectors, is located in Green Belt.

- 2.24 The Merseyside Employment Land Study (NWRA 2004) also addressed the quality of employment land in Halton, Knowsley and Sefton. The study provides a more positive statement about the quality of the available supply, although it should be noted the assessments were provided by the local authorities themselves.
- 2.25 Halton considered 61 sites (189.36 ha) of supply to be of either very good or good quality. This represented 90 percent of the total land supply – the highest level of high quality of all the Merseyside authorities. And 54 percent of the land was attributed to be very good quality.
- 2.26 In contrast only four percent of Knowsley’s land supply was categorised as very good quality, with a further 32 percent viewed as of good quality. 12 percent of the supply was judged to be of poor quality.
- 2.27 Sefton’s employment land supply is the lowest in Merseyside, although a large majority is considered to be very good (10 percent) or good quality (53 percent). 13 percent was judged to be of poor quality. However, more than half the supply is contaminated, the second most contaminated total in the sub-region. This is significant in view of its low quantity of supply. There is no definition of ‘contamination’, with the report relying on information from individual local authorities regarding contaminated sites.
- 2.28 Table 9 summarises the qualitative categories for each of the three authorities.

Table 9 – Summary of Quality of Employment Land 2004
Halton, Knowsley, Sefton

Local Authority	No. of Sites	Total, ha	Very Good, ha	Good, ha	Average, ha	Poor, ha
Halton	61	189.36	100.79	54.02	34.49	0.06
Knowsley	57	145.13	5.80	45.84	76.08	17.41
Sefton *	21	89.80	8.98	47.59	4.49	11.67

Source: Merseyside Employment Land Study, 2004

*N.B. 16.16 ha of Sefton land not assessed in qualitative terms

- 2.29 No direct comparison is available for West Lancashire. However the ‘Towards a Sustainable Employment Land Strategy – Lancashire West’ (Lancashire Economic Partnership 2006) did seek to establish a framework of sites which could ‘promote a ladder of business accommodation’ to serve new and indigenous businesses. The

report identified classification of 53 sites across the west of Lancashire, within six categories. The conclusions for West Lancashire are shown in Table 10.

Table 10 – Focused Package of Sites, West Lancashire

Type	Definition	Location
Prestige	High Profile; capable of re-positioning sub-regional image; attract regional and national markets	Whitemoss Business Park, Skelmersdale
Urban Gateway/Hub	Edge of town; distinctive location with clear identify; accommodate mix of uses	None
Neighbourhood Opportunity	Periphery of urban areas; accommodate relocation or expansion of indigenous companies	Cobbs Clough, Skelmersdale St Richards School, Skelmersdale St James School, Skelmersdale Greaves Hall Hospital, Banks
Rural Renaissance	Market towns; creating distinctive business location.	Hattersleys, Ormskirk Royal Ordnance, Burscough
Special	Unique locational offering, linked to specific economic development opportunity	None
Town Centres	Locations for high value added office based functions in town centre	Skelmersdale

Source: Towards a Sustainable Employment Land Strategy, Lancashire West, Lancashire Economic Partnership, 2006

- 2.30 The report acknowledges there are many other existing employment site allocations that do not readily fit the identified categories. It also comments, for West Lancashire, that demand in recent years has been from the logistics sector, seeking high bay warehouses. And whilst demand continues, the supply of quality sites for this use is running out. Suitable supply for offices is also noted as being limited.
- 2.31 These observations are reinforced in West Lancashire Borough Council's Employment Land Monitoring Report (2008). This notes that only limited levels of land remain in Skelmersdale for B2 use, although sites exist at Burscough and Simonswood. There is also limited B8 land, with the only remaining provision being at XL Business Park in Skelmersdale. And there is limited availability of B1 premises, even though there are designated sites.

Availability of Employment Land

- 2.32 The ready availability of suitable employment sites for development is vital to continued economic activity in the four local authorities' areas.

- 2.33 The Merseyside Employment Land Study (2004) provided, in so far as was possible, an understanding of availability of supply for Halton, Knowsley and Sefton. The following was noted:
- 42 percent of Halton's supply was immediately available. 50 percent was held for expansion uses. 7 percent was considered to be physically constrained. (N.B. The land area figures quoted in the 2004 report do not equate to these percentages)
 - In Knowsley only 6 percent of its total supply of 145.13 ha (i.e. 8.7 ha) was classed as available. The availability of the remaining land was unknown
 - 79 percent of Sefton's supply (61.3 ha), excluding Port and Maritime Zone sites, were viewed as available in the short term. 17 percent (13.2 ha) were available in the medium term. (N.B. This is despite the study also noting that over half the supply represents contaminated land).
- 2.34 The study shows contrasting statistics between the three local authority areas. And whilst descriptions are used such as 'short' and 'medium' term, no definitions of these timescales were provided in the report.
- 2.35 The North West Employment Land Study (2005) analysed all employment sites of 5 ha and above throughout the region. Sites in Halton, Knowsley and Sefton were assessed in the Merseyside & Halton sub-region. West Lancashire was assessed as part of Lancashire. Together the four authorities had 30 sites, with Halton the most (12) and West Lancashire the least (5).
- 2.36 Only nine sites were classed in the 'top tier and available for development' category, in terms of their market attractiveness. Five were in Halton, the rest in Sefton. Neither Knowsley nor West Lancashire was represented.
- 2.37 A further 11 sites were assessed as of average quality, with two of these considered not to be available within three years. The report provided no further definition of 'availability' beyond this point. All four local authority areas were represented in this classification.
- 2.38 The remaining 10 sites fell within the 'lower tier' (poor quality) description. The majority of these (60 percent) were in Knowsley. The other sites were in Halton and West Lancashire.

2.39 In general the land supply was considered to be of average or poor quality. Only 35 percent of the 330.72 ha total supply was seen as good quality and available supply. For Knowsley the supply position was particularly challenging, with all but one of the borough's seven sites being classed as of poor quality and unavailable within three years.

2.40 The market attractiveness assessment of the 30 sites is set out in Table 11. This reveals that only 31 percent of the land supply was assessed as good quality and readily available for development. Over 27 percent of the supply was considered to be poor quality, and most of this was unavailable for development within at least a three year period.

**Table 11 – Availability and Deliverability Rankings – Market Attractiveness
Halton, Knowsley, Sefton, West Lancashire Employment Sites
(5 ha or more)**

ID	Site Name	Area, ha	Top Tier		Middle Tier		Lower Tier	
			Available	Unavailable	Available	Unavailable	Available	Unavailable
MEHA 1	Manor Park III	15.32	✓					
MEHA 13	North of Hale Bank Road	22.80	✓					
MEHA 3	Plots 4 and 5 Daresbury Park	7.64	✓					
MEHA 4	Land North of Junction 11, M56	29.65	✓					
MEHA 5	Manor Park III	10.46	✓					
MESE 1	Former Peerless Refinery	6.80	✓					
MESE 3	Senate Business Park/Girobank	5.80	✓					
MESE 5	Former Vesty Site	7.40	✓					
MESE 6	Former Parcel Force Site	9.50	✓					
LAWL 1	XL Business Park	13.18			✓			
LAWL 2	Whitemoss Business Park	7.35			✓			
MEHA 12	Ditton Rail Freight Site 1	45.70			✓			
MEHA 6	Shell Green	6.02			✓			
MEHA 7	Shell Green	5.95			✓			
MEHA 9	Ex-Sleeper Depot	17.24			✓			
MEHA 10	Weston Point Docks	7.75			✓			
MEHA 11	Ineos Chlor Weston Point	12.48			✓			
MESE 2	Atlantic Park	18.20			✓			
MEKN 7	Kings Business Park	9.00			✓	✓		
MESE 4	Southport Business Park and extension	11.90				✓		

ID	Site Name	Area, ha	Top Tier		Middle Tier		Lower Tier	
			Available	Unavailable	Available	Unavailable	Available	Unavailable
MEHA 8	Johnsons Lane	8.66					✓	
LAWL 3	Cobbs Clough	9.82						✓
LAWL 4	Simonswood	5.02						✓
LAWL 5	Greaves Hall Business Park	5.21						✓
MEKN 1	Roscoe's Wood	7.90						✓
MEKN 2	Ex-Petrolite/Albright & Wilson	18.50						✓
MEKN 3	Briton Plantation	6.60						✓
MEKN 4	North Perimeter Road	12.70						✓
MEKN 5	Ford Expansion Land	18.50						✓
MEKN 6	Prescot – BICC Site C	8.80						✓
TOTAL		371.85	115.37	-	133.87	20.90	8.66	93.05

Source: North West Employment Land Study, NWRA, 2005

Take-Up Rates

- 2.41 The Merseyside Employment Land Study (2004) stated that in the seven years period between 1996 and 2003 Halton and Knowsley had the highest average take-up rates in the Merseyside sub-region, whilst Sefton had the lowest. Indeed Halton and Knowsley's performances represent over half of all the Merseyside subregion's take-up.
- 2.42 On the other hand Sefton's figure of 4.5 ha per annum was less than half of the Merseyside average of 10.5 ha per authority. Table 12 summarises the take-up rates.

Table 12 – Employment Land Take-up Rates, Merseyside Authorities 1996-2003*

Area	Total, ha	Average per annum, ha
Halton	130.27	18.6
Knowsley	98.57	14.1
Wirral	71.85	10.3
Liverpool	62.04	8.8
St Helens	46.03	6.6
Sefton	31.57	4.51
Merseyside	440.33	10.5

Source: Merseyside Employment Land Study, 2004

* N.B. West Lancashire's respective figures for this period are 57.22 and 8.2 ha

- 2.43 BE Group has reviewed available data for West Lancashire for this same period. Between 1996-2003, a total of 57.22 ha of land was taken up, reflecting an annual average of 8.2 ha. Whilst this was greater than Sefton, the figure was substantially below that of Halton and Knowsley.
- 2.44 The 2004 Employment Land Study acknowledged that take-up rates vary significantly both year on year and across the sub-region. This point is illustrated by West Lancashire's statistics. In 2003-2004 alone the district saw a take-up figure almost 25 percent higher than the combined total for the previous three years.
- 2.45 The study provided the following observations about Halton, Knowsley and Sefton.
- Halton:
 - The majority of take-up was for B1 business and light industrial uses

- The quantity of B2 use take-up was reasonably constant throughout the period
- B8 uses only feature from 2000-2001 onwards.

- Knowsley:
 - More recent data indicates a substantially lower take-up rate. This is attributed to a combination of factors such as sites on Knowsley Industrial Park reaching completion, increased take-up rates elsewhere (e.g. Liverpool) and a general down-turn in land take-up since 2001-2002.

- Sefton:
 - The majority of take-up has been for port related uses, although no land had been recorded for this use since 1999-2000. Sefton UDP Policy EDT9 describes port-related uses as Class B1, B2 and B8 uses, including the open storage of materials and temporary uses, which directly serve port operations or require a port location.
 - B1 uses represented the second highest take-up of employment land
 - There had been no B2 uses only take-up since 1997 and less than 0.5 ha of B8 uses since 1999.

2.46 The study concluded that, based on the average take-up rates, the 'unconstrained supply' estimates of employment land, in 2004, suggested Halton had 10 years supply; Knowsley had 11 years, and Sefton 18 years. The Halton and Knowsley figures, the lowest forward supply figures in Merseyside reflect their high take-up rates over several years prior to 2004.

2.47 When poor quality sites are excluded from the supply, there is only a marginal reduction for Halton (from 11 to 10 years) and Knowsley (from 11 to 9 years). The change is more dramatic for Sefton, with a reduction of one-third, from 18 to 12 years.

2.48 Commentary on West Lancashire's take-up rates is drawn from data supplied by the Council. Although data has been supplied commencing from 1986/87, BE Group has, for consistency, used the same base date of 1996 applied to the other local

authority areas. This shows a take-up of 8.2 ha per annum over the period (compared to 6.34 ha average since 1986/87).

- 2.49 Applying the 8.2 ha to the remaining available allocations at April 2008, suggests the District has a further 7 years supply.
- 2.50 For Halton, Sefton and West Lancashire land take-up is calculated from Planning Department monitoring records of completed development. Although Knowsley now monitor completions in the same way, historically land take-up rates were sourced from Economic Development. These were based on calculations of sites that have been sold or let, not necessarily built on. For consistency of assessment of Knowsley's figures, the Economic Development data has been used.

Socio-Economic Issues

- 2.51 A number of issues affect the economic growth of all four local authority areas:
- GVA (Gross Value Added) and household incomes
 - Industry sectors' representation
 - Job density rates
 - Self employment
 - Unemployment
 - Business start-up rates
 - Stock of VAT – registered businesses.
- 2.52 Table 10 provides per capita GVA figures for the four local authority areas. Table 10 contains data obtained from two different sources, provided for comparative purposes. First ONS data is included, although this records data to the level of an individual local authority area only for Sefton. This is because ONS records Knowsley with St Helens (East Merseyside); Halton with Warrington, and West Lancashire as part of the County of Lancashire.
- 2.53 It is difficult to draw conclusions from the ONS data. It suggests that with the possible exception of Halton, performance lags behind the North West average. For Knowsley and Sefton per capita GVA is some 25 percent below the North West figure.
- 2.54 Table 13 also includes comparative data from the Liverpool City Region Economic Projections and Prospects report (October 2007). This report includes baseline

projections for GVA for each City Region local authority area. BE Group has calculated the per capita figures from the 2005 population forecasts included in the report.

Table 13 – Gross Value Added

Area	Per Capita GVA, £		Comments
	Liverpool City Region Projections, 2005	ONS GVA in NW, 2007	
UK	n/a	18,205	
North West	n/a	15,571	
Merseyside	12,084	12,784	
Knowsley	11,939	11,878	ONS GVA figure is average for combined Knowsley + St Helens (East Merseyside) area.
Halton	17,563	20,466	ONS GVA figure is average for Halton and Warrington
Sefton	9,733	11,299	
West Lancashire	12,836	14,966	ONS GVA figure is average for all of Lancashire

Source: ONS GVA in the North West, 2007

Liverpool City Region Economic Projections and Prospects 2007

- 2.55 Comparing the two data sources confirms Halton is the only area to better the North West regional average. Knowsley and Sefton substantially underperform, with the City Region projections suggesting Sefton is over one-third below the North West figure. West Lancashire's per capita GVA is also below Lancashire and the North West averages.
- 2.56 ONS has also published a provisional indexing of gross disposable household income on a per capita basis. The index figures for the period 2001 to 2006 show the North West marginally closing the gap with the UK and England figures. Both Halton (with Warrington) and Knowsley (with St Helens) have also closed the gap. West Lancashire (included in Lancashire's figure) remains unchanged, but Sefton has seen its figure drop from 97 to 96. Nevertheless at 96, as with Halton at 97, it is several percentage points above the North West figure (see Table 14).

Table 14 – Indexed Gross Disposable Household Income Per Head, 2006

Area	2001	2006
UK	100	100

Area	2001	2006
England	102	102
North West	91	92
Halton (with Warrington)	95	97
West Lancashire (with Lancashire)	90	90
Knowsley (with St Helens)	88	90
Sefton	97	96

Source: ONS, 2007

Reliance Upon Certain Industry Sectors

- 2.57 Greater Merseyside's previous reliance on manufacturing and a lack of dynamic high-value sectors, such as knowledge-based industry, has contributed to suppress economic growth. The incidence of high-volume/low-value manufacturing and primary industry activities, the type of businesses most vulnerable to relocation to lower wage economies, is one legacy of the investment in major new employment locations in Skelmersdale, Runcorn (both new towns) and Knowsley (largely a new 20th Century area). The wider Halton area has historically also accommodated highly capital intensive production activities, with energy (rather than labour) being the principal cost. This means that the manufacturing sector still represents a higher than national average share.
- 2.58 The over reliance on certain industry sectors is a common theme of commentary in the four authorities' Annual Monitoring Reports for 2007 and 2008.
- 2.59 Knowsley's AMR also recognises the borough is reliant upon certain industry sectors. The manufacturing sector (which includes Jaguar's Halewood plant) makes a significant contribution to the local economy. Over 22 percent of the employment is in this sector, substantially higher than the North West and national coverages. The Merseyside Employment Land Study (2004) noted that Knowsley had the highest percentage of employees in manufacturing of any of the sub-region areas. In stark contrast to the rest of Merseyside and the North West, manufacturing jobs were remaining constant in actual numbers. A further 32 percent is provided by Public Administration, Education and Health.
- 2.60 The AMR for Sefton states that employment is concentrated in a few key sectors. These are public services; port-related activities; food products; ICT and financial services, as well as retail and tourism. Manufacturing sector represents only 8

percent of the workforce, well below national, regional and sub-regional averages. And significant disparity is demonstrated in that although Sefton has the second highest percentage of workers in Merseyside & Halton (18 percent), it has the lowest land supply share (8 percent). Furthermore there is a general bias towards service sector activity in North Sefton and industrial sector activity in South Sefton.

2.61 In the West Lancashire Economic Baseline Study (2009), based on BERR data, the district has above regional and national representation levels for manufacturing, transport and communications sectors, but under-representation in the finance, ICT and business services industries.

2.62 In contrast Halton Economic Development Officers report the following:

- The growth rate of the Halton business base (new company formation) has been significantly higher over the last decade than both the North West and UK rate. However, there remains a gap in the number of firms in the micro business sector (0 to 4 employee band) and a smaller proportion of businesses in the lowest financial turnover bands. It is estimated that it would take a net increase of around 96 firms (4 percent) to achieve a 1 percent increase in density levels and a net increase of some 785 (33 percent) businesses to reach regional density levels.
- It is estimated that £2.2bn of Gross Value Added (GVA) was generated in Halton in 2007 which represents 2.06 percent of North West GVA.
- Over the last decade there has been a fundamental adjustment in the composition of the local economy. The contribution of manufacturing to total GVA is estimated to have fallen to 23 percent (from close to 50 percent in the early 1990s and over 30 percent in 2002), and is forecast to fall by a further 4 percent over the next 8 years, indicating a transition to a more diverse and balanced economy. However, lower value-added sectors continue to account some 60 percent of estimated GVA.
- Halton GVA is expected to grow by 2 percent per year reaching £2.99bn in 2020.
- The contribution of manufacturing to GVA will decline by some 4 percent and will be balanced by an increase in the share of transport and communications and finance and business services with most other sectors demonstrating only minor adjustments.

- 2.63 At the macro level the Merseyside Employment Land Study (2004) sets out the trends that would be most likely to impact on future employment land needs:
- The continuation of slow but steady economic growth in the UK
 - Uncertainty over the UK's ability to sustain its past share of inward investment by comparison to the rest of Europe, and the declining size of the European inward investment market
 - A continuing shift from manufacturing to service sector jobs and knowledge-based industries
 - An increase in self-employment and small business formation
 - Some continuing relocation by the private sector away from London and the South East, depending on the speed of economic growth.
- 2.64 No specific mention was made of the growth of internet-based companies (though these may be associated with knowledge-based industries).
- 2.65 The turbulent current situation arising from the credit crunch will impact on economic development activity, at least in the short term. The Regional Economic Forecasting Panel's Business Forecasts North West (Spring 2008) reports on an expected economic growth slowdown nationally and in the region. It comments that the North West will be sheltered during the downturn, but by a lesser margin than expected shortly after the credit crisis began. In the recovery period, and consistent with long term trends, North West growth is likely to be slower than in the UK as a whole. The underlying trends identified above are still however likely to hold true over the long term.

Low Job Density

- 2.66 The Office for National Statistics provides job density figures. 'Job Density' is defined as the number of filled jobs in an area divided by the working-age population resident in that area. The most up-to-date information relating to job density and number of jobs, available for the same year, relates to 2006. The data for the four local authorities is summarised in Table 15.

Table 15 – Halton, Knowsley, Sefton & West Lancashire

Area	Number of Jobs, 2005	Job Density, 2005
Halton	61,000	0.82
Knowsley	65,000	0.70

Area	Number of Jobs, 2005	Job Density, 2005
Sefton	121,000	0.75
West Lancashire	51,000	0.77
North West	-	0.85
Great Britain	-	0.88

Source: ONS Job Density, 2006

N.B. Jobs includes employees, self employment, government supported trainees and HM Forces

2.67 The data shows that none of the four local authority areas match the North West job density rate, which itself is less than the Great Britain average. Comparison with the data for all the North West local authorities shows Halton and West Lancashire positioned in the second quartile; Sefton and Knowsley in the third quartile. However two other Merseyside authorities (St Helens and Wirral) have lower job density rates than Knowsley.

Self-Employment/Unemployment

2.68 ONS data provides evidence of self-employment rates within the study area. Perhaps reflecting its more rural nature, West Lancashire has the highest rate (9.5 percent of those of working age); a figure that exceeds the North West and UK averages. Sefton also exceeds the North West average, but lags behind the UK figure. The rates for Halton and Knowsley are considerably below even the North West region.

2.69 Comparison of the position in 2004, against 2007 rates, shows three of the areas (Knowsley is the exception) have increased their percentage of self-employed. This contrasts to the North West, which as a whole saw a marginal drop. West Lancashire exhibits the biggest rise, moving from below to above the UK average. Table 16 illustrates the situation.

Table 16 – Self-Employment Rates 2004 and 2007
Percentage of Working Age Population

Location	2004, percent	2007, percent	Change, percent
UK	9.1	9.3	+0.2
North West	7.8	7.7	-0.1
Halton	5.4	5.8	+0.4
Knowsley	5.4	5.4	-
Sefton	7.7	8.0	+0.3
West Lancashire	8.2	9.5	+1.3

Source: ONS, 2007

2.70 ONS data for the same two years, for unemployment, indicates a contrasting picture amongst the four local authorities. Whilst Knowsley and Sefton followed the national and North West experience of a rise in the percentage of unemployment, Halton and West Lancashire's unemployment rate actually fell. The percentage rate increase in Knowsley and Sefton exceeded the regional figure of 1.1 percent.

2.71 Although Halton's unemployment rate fell to 7.7 percent, like Sefton (6.7 percent) and Knowsley (8.3 percent), this was still above the North West figure. However, West Lancashire's rate dropped by more than half, to 2.5 percent. At 2.5 percent this is less than half the national and North West averages (Table 17).

Table 17 – Unemployment Rates 2004 and 2007
Percentage of Working Age Population

Location	2004, percent	2007, percent	Change, percent
UK	4.9	5.3	+0.4
North West	4.7	5.8	+1.1
Halton	8.3	7.7	-0.6
Knowsley	6.6	8.3	+1.7
Sefton	5.4	6.7	+1.3
West Lancashire	5.4	2.5	-2.9

Source: ONS, 2007

2.72 The fact that unemployment continued to fall in West Lancashire, year on year between 2004 and 2007, suggests that the local labour market within the District continued to strengthen. This point is also recognised in the West Lancashire Economic Baseline Report.

- 2.73 Model-based estimates developed by ONS, as opposed to job-seeker allowance claimant counts, provide an indication of economic inactivity in the four local authority areas. Whilst West Lancashire again is the only area with an economic inactivity rate below that of the North West, it did see a rise of one percent (to 14,800 people) between 2004 and 2007.
- 2.74 The picture is worse in Sefton, where from being below both the national and regional rates in 2004, the area now exceeds both. The rate is now 24.3 percent, reflecting an increase of 3600 people, to 38,900.
- 2.75 Both Halton and Knowsley saw reductions in their economic inactivity rates. Although Knowsley's rate reduction was more than double the national rate, it still translated to a small increase in terms of the number of people (from 26,000 to 26,300). Halton's rate saw significant improvement (the reduction rate was ten times that exhibited nationally), with 2400 less people being economically inactive. Table 18 summarises the position.

Table 18 – Economic Inactivity Rates 2004 and 2007
Percentage of Working Age Population

Location	2004		2007		Change	
	percent	number	percent	number	percent	number
UK	22.0	-	21.6	-	-0.4	-
North West	23.0	972,900	23.2	979,400	-0.6	-13,500
Halton	27.9	20,300	23.8	17,900	-4.1	-2,400
Knowsley	29.1	26,000	28.2	26,300	-0.9	+300
Sefton	21.9	35,300	24.3	38,900	+2.4	+3,600
West Lancashire	21.1	14,000	22.21	14,800	+1.0	+800

Source: ONS, 2007

Business Start-Ups/Business Stock

- 2.76 VAT registrations and de-registrations provide the best guide to the pattern of business start-ups and closures. They are an indicator of the level of entrepreneurship and of the health of the business population. They cannot however give a complete picture as some VAT exempt sectors and businesses operating below the threshold for VAT registration are not covered.
- 2.77 Based on figures for the period 1998 to 2006, Halton, Knowsley and Sefton have

consistently had low numbers of start-ups. Whilst Halton has improved against the Merseyside sub-regional performance, it continues to lag behind the North West average, and remains at around two-thirds of the UK figure. This is despite year on year growth in VAT registered businesses since 1998, and having bettered the Merseyside figure every year since 2002.

- 2.78 For Halton to attain North West business density levels (the number of businesses relative to population), it would need a net increase of around one third of the existing stock of VAT registered businesses. The biggest gaps are in business services and distribution, both areas forming part of the service industry sector which regionally and nationally is forecast to grow.
- 2.79 Like Halton, Sefton's start-up rate is approximately two thirds of the UK figure. However, Knowsley's rate, now at 17 registrations per 10,000 people, is less than half the national figure of 37, as well as being significantly below the regional figure of 32.
- 2.80 In the context of Merseyside's performance West Lancashire has a good rate of business start-ups. Indeed for much of the time since 1998 it has matched or exceeded the North West region's performance. However the most recent figures, for 2006, show a negative position for West Lancashire. The start-up rate of 29 registrations is the lowest level for the district since 1994. Table 19 provides details.

Table 19 – VAT Registrations Per 10,000 Resident Adults

Area	1998	1999	2000	2001	2002	2003	2004	2005	2006
UK	39	38	38	36	37	40	38	37	37
England	42	40	40	38	39	42	40	39	39
North West	33	32	32	31	32	35	33	33	32
Merseyside	23	23	23	22	22	26	24	24	23
Lancashire	34	33	33	32	33	37	34	32	31
Halton	23	21	23	21	22	30	27	28	24
Knowsley	17	17	14	19	17	17	18	19	17
Sefton	25	25	23	25	25	26	24	26	23
West Lancashire	30	35	32	33	31	33	32	35	29

Source: BERR, 2007

- 2.81 The UK has seen increases in the stock of VAT-registered enterprises in every year since 1995. This has resulted in a 21 percent rise in the number between the

beginning of 1995 and the start of 2007. During this same period the North West stock grew by only 15 percent. Merseyside (17 percent) exceeded the regional figure, whilst Lancashire underperformed (13 percent).

- 2.82 The four local authority areas have experienced contrasting performances over this period. Those with the largest stock numbers (Sefton and West Lancashire), despite seeing continual year on year growth, have experienced a rise of around only 10-11 percent. Sefton's Annual Monitoring Report (2007) states that with the introduction of measures such as Stepclever (formerly Sefton & Liverpool Enterprise Growth Initiative) it is hoped the number of VAT registrations will increase and de-registrations decline. The continuation of start-ups and survivals for more than three years in Merseyside is acknowledged to be low – and even lower in the Stepclever wards of South Sefton.
- 2.83 Halton and Knowsley, albeit growing from much smaller base numbers, have seen growth rates of 29 and 32 percent respectively. For both areas this has been double the regional growth rate, as well as being 27-34 percent higher than the UK achievement.
- 2.84 Analysing the VAT stock at the beginning of 2007, against resident adults (mid 2006) populations, re-affirms the generally low business stock and low level of entrepreneurship in the study area. Only West Lancashire provides a positive outlook, with the ratio of VAT registrations to population (1:25 population) better than the North West rate (1:30), and matching the UK figure.
- 2.85 In contrast both Halton and Sefton have a ratio of 1:39, though this is better than the Merseyside sub-region figure of 1:43. Knowsley's ratio is substantially greater at 1:61. This is the worst figure of any of the North West local authority areas, despite the fact Knowsley's VAT-registered stock has, since 1995, grown at a higher rate than anywhere else in the North West.
- 2.86 Table 20 provides details of VAT stock data.

Table 20 – VAT Stock Data 1995-2007

Area	Vat Stock Numbers		Percentage Growth 1995-2007	VAT Registration: Resident Adults Ratio
	1995	2007		
UK	1,615,735	1,956,750	21	1:25
North West	160,390	186,045	15	1:30
Merseyside	21,720	25,550	17	1:43
Lancashire	30,490	34,565	13	1:27
Halton	1,850	2,415	29	1:39
Knowsley	1,480	1,960	32	1:61
Sefton	5,180	5,765	11	1:39
West Lancashire	3,140	3,450	10	1:25

Source: BERR, 2007

Employment Land Policy Considerations

2.87 The North West of England Plan Regional Spatial Strategy to 2021 (RSS) was published in September 2008. It identifies five sub-area Priority Areas, one of which is the Liverpool City Region. This includes all four Halton, Knowsley, Sefton and West Lancashire local authority areas.

2.88 RSS identifies:

- The second priority for growth and development includes the inner areas surrounding Liverpool (South Sefton fits to this). Emphasis should be placed on areas in need of regeneration and Housing Market Renewal Areas in particular (including Liverpool/Sefton HMRA Pathfinder)
- Towns and cities in the Liverpool City Region and larger suburban centres within the City Region are included in the third priority. Runcorn, Widnes, Southport and Skelmersdale, within the study area, are specifically mentioned (Policy RDF1)
- There is no need for any exceptional substantial strategic change to the Lancashire or Merseyside Green Belt and their boundaries before 2011. After 2011 the presumption will be against exceptional strategic change, but subject to the agreement of The Regional Planning Body, any local detailed boundary changes should be examined through the LDF process (Policy RDF4)
- The provision of sites and premises should help promote Liverpool City Region's growth opportunities in advanced manufacturing and engineering;

financial and professional services; creative industries; biomedical; high value added knowledge based industries; ICT/digital, maritime and communications (Policy W1). N.B. West Lancashire also falls within the remit of the Lancashire Economic Strategy (LES), which has slightly different growth priorities. For the LES, energy and environmental technologies; chemicals; aerospace and automotive and tourism are priority areas

- Recognition of the requirement to deliver a range of sites with influences at different spatial levels – regionally significant; sub-regional, local (Policy W1, para 6.2)
- Knowsley and Halton are identified amongst the districts with the highest rates of working age population without qualifications. They are also highlighted as having particularly high unemployment rates (Policy W1, para 6.4)
- The Regional Planning Body will work with NWDA, GONW and partners to identify regionally significant sites within the urban areas of Liverpool City Region. Some will be new. Others may be the locations for Regionally Significant Economic Development identified by NWDA as being critical to the delivery of the RES, especially where they are already allocated in adopted plans or have planning consent. Daresbury is such a site (reflecting the NWDA, 2009 listing of Strategic Regional Sites)
- Inter-modal freight terminals are not included in the employment land allocations (Policy W3, para 6.8). The Ditton SRF Park should therefore be excluded from Halton's land supply figure
- The demand for employment land to be released for other uses is particularly strong in the eastern parts of the Liverpool City Region (St Helens and Knowsley). But this is one of the areas that have an important role to play in driving forward the regional economy (Policy W4 para 6.19)
- There should be a strong presumption in favour of safeguarding land close to ports for logistics, transport and port-related development where there is at least a reasonable likelihood of restitution to significant operational use within 15 years. In determining requirements for port expansion beyond existing boundaries, account should be taken of the scope for intensification and rationalisation within the existing boundary; the scope for relocating existing activities or facilities off-site; the scope for developing proposed activities or facilities off-site. This applies to the Port of Liverpool (Sefton) and Manchester Ship Canal (Halton). (Policy RT6).

2.89 The main policies likely to apply to the four authorities' areas are highlighted in Table 21.

Table 21 – RSS Liverpool City Region Policies

	Policy Objectives
Policy LCR1 Liverpool City Region Priorities	<ul style="list-style-type: none"> • Encourage investment and sustainable development in Liverpool, surrounding inner areas, the towns/cities as set out in RDF1 and larger suburban centres, in order to contribute to the Policy W1 growth opportunities
	<ul style="list-style-type: none"> • Focus sustained and co-ordinated programmes to maximise economic potential and promote urban renaissance and social inclusion in the New Heartlands HMRA
	<ul style="list-style-type: none"> • Maximise the employment potential of the Strategic Investment Areas and Economic Development Zones
	<ul style="list-style-type: none"> • Support and develop the role of the Merseyside Ports, especially the Port of Liverpool as the only part of national significance for deep-sea trade in the North of England
Policy LCR2 The Regional Centre and Inner Areas of Liverpool City Region	<ul style="list-style-type: none"> • Maintaining and enhancing the role of Bootle to provide employment
	<ul style="list-style-type: none"> • The development of the New Heartlands HMRA Pathfinder to revitalise housing in Sefton
	<ul style="list-style-type: none"> • Supporting the development of the Mersey Ports and the maritime economy
	<ul style="list-style-type: none"> • Providing for employment within the inner areas
Policy LCR3 Outer part of the Liverpool City Region (Southport, Knowsley, Halton, Skelmersdale)	<ul style="list-style-type: none"> • Focus economic development in the towns/cities and larger suburban centres as set out in RDF1
Policy LCR4 The remaining rural parts of Liverpool City Region	<ul style="list-style-type: none"> • Support and diversify the rural economy, focusing development in Key Service Centres (West Lancashire excluding Skelmersdale)

Source: North West RSS, 2008

2.90 RSS also provides advice on the provision of employment land, at Policy W3 'Supply of Employment Land'. However this does not align to the Liverpool City Region, as figures relate to the North West's five subregions of Cumbria, Lancashire, Greater Manchester, Merseyside & Halton, and Cheshire & Warrington. Consequently, West

Lancashire is included within Lancashire.

2.91 Policy W3 states that employment land portfolios should reflect the continuing economic restructuring, which will result in less need for B2 land and more for B1 uses. Also, 'available' land is defined as fully serviced, actively marketed – or likely to be in a three year period.

2.92 RSS does not set land target figures to the level of individual authorities. This is referred to as a future action of the new Regional Planning Body, as part of a separate Regional Implementation Framework. Provision figures are identified for Merseyside & Halton and Lancashire, for the period 2005 to 2021.

2.93 Based on respective 2005 supply figures of 1234 ha and 1069 ha, Merseyside & Halton and Lancashire are set additional allocations of 494 ha and 294 ha, up to 2021 (see Table 22). In calculating this figures it is noted:

- The baseline supply figures reflect the Regional Employment Land Study (2005).
- Whilst acknowledged as not ideal, assumptions were made between increase in GVA and take-up rates, to reflect economic growth rather than simply project forward historic take-up rates. The scenarios applied match those used for housing figures.
- A 20 percent flexibility factor was also applied to both Merseyside & Halton and Lancashire, reflecting the degree of uncertainty in establishing employment land requirements.

Table 22 – RSS Provision of Employment Land 2005-2021 (hectares)

	Greater Manchester	Merseyside and Halton	Lancashire	Cumbria	Cheshire and Warrington	North West
2005 Supply	1369	1234	1069	633	1171	5475
Current take up per annum	112	76	68	16	41	313
Projected inc in take up	6%	18.5%	4.25%	17.5%	6.00%	9.22%
Projected take up per annum	119	90	71	19	43	342
Need 2005-21	1904	1440	1136	304	688	5472
Extra allocation	536	206	67	-329	-483	-3

	Greater Manchester	Merseyside and Halton	Lancashire	Cumbria	Cheshire and Warrington	North West
required						
Flexibility factor	20%	20%	20%	33%	27%	-
Need 2005-21 (incorporating flexibility factor)	2285	1728	1363	404	874	6654
Extra allocation required (incorporating flexibility factor)	917	494	294	-229	-297	1179

Source: 4NW, 2008

- 2.94 The wording of Policy W3 indicates a focus only on B1, B2 and B8 land use allocations. Whilst strategic regional sites are included, inter-modal freight terminals are not. This would therefore suggest the Ditton Strategic Rail Freight Park (3MG), formerly identified as a regional investment site (Regional Economic Strategy 2006) should now be excluded from Halton's employment land supply figure. In contrast, Knowsley's Rail Freight terminal is not identified as an intermodal facility in RSS, so the associated land take-up for this development is included in the borough's employment land figures.
- 2.95 Consultation with 4NW, to clarify the position regarding the 3MG site (because of its substantial impact on Halton's employment land supply) has established, that although RSS text was amended to clarify that inter-modal freight terminals are not included in the supply calculations (in line with the Secretary of State's decision on Panel recommendation 5.6), the baseline land supply and take-up rate figures have not been changed. It indicates that the 1234 ha of supply for Merseyside and Halton includes available land at 3MG. This is because the baseline data did not differentiate inter-modal freight terminal sites.
- 2.96 As a result, although inter-modal freight terminals are not specifically covered by Policy W3, because there is a separate policy framework set out in Policy RT8, 4NW consider they should be included in this study's work on future supply.
- 2.97 4NW advise that they have made a commitment to facilitate the distribution of employment land figures to individual local authority area level. This reflects the

content of paragraph 6.12 of the RSS. At Summer 2009 4NW were updating supply side information by asking local authorities to provide current supply information. They have also commissioned consultants to undertake a broad commercial viability assessment of the identified sites.

- 2.98 4NW guidance note 'Employment Land Implementation Note – April 2009' now provides local authorities with guidance on the distribution of land supply figures to district level. In particular paragraph 3.2 of this Note, states that local authorities must use their own judgement as to whether to apply the flexibility factor in supply calculations. This reflects the content of paragraph 6.12 of the RSS. 4NW are updating supply side information by asking local authorities to provide current supply information. They have also commissioned consultants to undertake a broad commercial viability assessment of the identified sites.

Strategic Housing Land Availability Assessment

- 2.99 The 2009 Strategic Housing Land Availability Assessments (SHLAA) reviewed the potential availability of some employment sites across each of the local authority areas for residential use. The studies will provide an indication of the level of housing land supply in the Council areas and will provide a significant piece of the evidence base for each local authority's LDF.
- 2.100 Table 23 shows both the employment sites and existing employment areas considered for residential uses in each SHLAA. Whilst the consolidated data analysis is presented here, more detailed information is included in Appendices 28-31 on an individual local authority basis.

Table 23 – Employment Land Reviewed for SHLAA

Area	Employment Sites		Existing Employment Areas	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Halton	4	5.46	32	60.35
Knowsley	3	20.49	3	2.89
Sefton	3	11.75	36	60.47
West Lancashire	1	13.07	9	14.27
Study area	11	50.77	80	137.98

Source: Local Authorities 2008

- 2.101 As Table 23 illustrates only a small number of employment sites have been reviewed

for the SHLAA. For both Halton and Sefton, 60 ha of land in existing employment areas have been reviewed. In Halton, this includes 28 ha at Runcorn Docks, which forms part of Peel's redevelopment plans (Peel's intentions for this land are addressed later in this report). Both Knowsley and West Lancashire have well defined and densely developed employment areas, in many cases dominated by heavy industry. Because of this, only a small amount of employment land was reviewed for residential uses in their SHLAAs.

2.102 The SHLAA was preceded by a 'Call for Sites' consultation, in which each local authority invited the public (including landowners and their representatives) to suggest land or premises which they considered to be suitable for housing development, employment uses, or a mix of these and other uses. Again this is to inform future allocations in the LDF process. Table 24 illustrates both the employment sites and existing employment areas, which respondents suggested for other uses. It also shows land put forward for employment purposes. Often respondents suggested a mix of uses (including employment) or put employment as a second choice, after residential.

Table 24 – Call for Sites

Area	Employment Sites, Proposed for Other Uses		Existing Employment Areas, Proposed for Other Uses		Land Proposed for Employment Uses		Land Proposed for Mixed-Use (or with Employment as Second Choice)	
	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha	No. of Sites	Total Area, ha
Halton	1	1.49	1	0.50	4	37.75	5	18.10
Knowsley	2	12.36	0	0.00	2	97.86	41	361.85
Sefton	1	2.79	17	21.98	6	69.44	29	239.38
West Lancashire	3	24.67	19	27.02	31	245.51	41	268.50
Study Area	7	41.31	37	49.50	43	450.56	116	887.83

Source: Local Authorities 2008

2.103 Table 24 shows that in Halton and Knowsley very few employment sites were put forward for other uses. In contrast, in Sefton around one third of all sites put forward relate to alternative use proposals for existing employment sites. A number of these reflect sites in North Sefton, being promoted for residential use. West Lancashire also has a number of existing employment sites, primarily in Ormskirk and the rural

areas, put forward for non-employment uses. Yet West Lancashire also has the largest amount of land proposed for new employment uses. 31 sites, totalling 246 ha have been put forward, again mainly in rural locations and mainly in Green Belt.

- 2.104 In Knowsley and Sefton, most respondents suggested mixed-use schemes or listed employment as a second choice. In Knowsley such proposals were focused on Green Belt land between Kirkby and Huyton, while in Sefton proposals were spread across Green Belt areas of North Sefton and urban areas of South Sefton. However the scale of land in Knowsley, almost 98 ha, reflects two large proposed extensions to Huyton industrial Area, extending into the Green Belt both north and south of the M62 motorway.
- 2.105 BE Group has used the Call For Sites data as a basis for reviewing future employment land allocations. For Halton and Knowsley this relates to identifying specific sites, rather than the areas of search considered for Sefton and West Lancashire. This is addressed in Section 8.0.

Summary

- 2.106 For the period 2001 to 2016 the study area has 593.20 ha of allocated land. The local authorities' Annual Monitoring Reports for 2008 indicate 436.66 ha remain, with take-up in the past year totalling 34.55 ha. Over two-thirds of the take-up was in Halton. Little was completed in Sefton or West Lancashire.
- 2.107 The study area has a number of socio-economic issues. GVA per capita lags behind the North West average, except in Halton. Manufacturing continues to provide a significant share of employment in Halton, Knowsley and West Lancashire. All three have above regional and national levels. The reverse is true for Sefton. For all four authority areas job density figures are below national and regional averages.
- 2.108 Self employment statistics present a contrasting picture for the study area. Whilst Sefton and West Lancashire exhibit above average levels (compared to the North West), Knowsley and Halton are below. And with the exception of West Lancashire, unemployment levels are high by comparison to the North West figure. The rate in West Lancashire is exceptionally low, at less than half the UK average.
- 2.109 There is much to do to raise business start-up levels. Only West Lancashire comes close to the regional average. Knowsley's rate is less than half the UK average.

2.110 RSS land supply figures, which form the basis of future supply calculations, are grounded in the 2005 RELS – a study that identified only sites in excess of 5 ha. Yet 85 percent of the sites identified in the current supply fall below this threshold.

2.111 Notwithstanding the wording of Policy W3 in RSS, inter-modal freight terminal facilities should, according to 4NW, be included in employment land supply figures.

3.0 SOCIO-ECONOMIC PROFILE

Introduction

- 3.1 It is important to understand the nature of the study area's economy in order to provide suitable employment opportunities to allow sustainable growth. For example employment land should ideally be provided close to existing concentrations of businesses or in areas where companies want to locate.
- 3.2 This section therefore, considers the size of the economy, where businesses are located, and what type of businesses they are. By appreciating these aspects it is easier to facilitate economic development by allocating land in the correct locations and encouraging the development of the appropriate type of premises. The profile is a result of secondary research, drawing together a number of existing data sources.

Demographic Assessment

- 3.3 The study area has a population of 656,400 (see Table 25) which is 9.6 percent of the North West's total. By far the most populated local authority area (LA) is Sefton which has 42.1 percent of the study area's residents. Halton and West Lancashire are the least populated.

Table 25 – Study Area Population

Area	Population	Proportion, percent
Halton	119,500	18.2
Knowsley	150,900	23.0
Sefton	276,200	42.1
West Lancashire	109,800	16.7
Study Area	656,400	-

Source: ONS Mid-Year Population Estimates 2007

Table 26 – Working Age Population – Economically Active

Area	Working Age Population	Total Economically Active	Proportion, percent
Halton	75,400	56,400	74.8
Knowsley	93,000	66,700	71.1
Sefton	160,700	123,100	76.6
West Lancashire	66,400	50,600	76.2
Study Area	395,500	296,800	75.0

Area	Working Age Population	Total Economically Active	Proportion, percent
North West	4,212,000	3,222,700	76.5
Great Britain	36,445,500	28,633,600	78.6

Source: ONS Annual Population Survey Oct 2006 – Sept 2007

- 3.4 Office of National Statistics (ONS) data states that 75.0 percent of the study area's population is economically active (see Table 26). This is slightly below the North West average and notably below Great Britain's (76.5 percent and 78.6 percent respectively). Within the study area, Sefton and West Lancashire come closest to meeting the wider averages. However Halton and, particularly, Knowsley have below average levels of economic activity.
- 3.5 The study area has an unemployment rate of 3.2 percent, based on the proportion of Job Seekers Allowance (JSA) claimants of the working age population (Table 27). This is higher than the North West and national averages. Halton, Knowsley and Sefton perform more poorly than the regional and national averages, Knowsley particularly so. West Lancashire's rate is slightly above the national average, but betters the North West's performance.

Table 27 – Unemployment Rates

Area	Working Age Population	Total JSA Claimants	Proportion, percent
Halton	75,400	2324	3.1
Knowsley	93,000	3901	4.2
Sefton	162,000	4964	3.1
West Lancashire	66,400	1572	2.4
Study Area	396,800	12,761	3.2
North West	4,240,000	108,717	2.6
Great Britain	37,904,000	828,410	2.2

Source: ONS Annual Population Survey Mid 2007
ONS JSA Claimants July 2007 to June 2008

- 3.6 Table 28 shows that residents of the study area are on average poorly qualified within the context of the North West and Great Britain. There is a significantly lower than average proportion of the working age population qualified to NVQ three and above; a lower proportion of people qualified to NVQ one and two; and a high proportion (19.1 percent) with no qualifications.

- 3.7 Overall Sefton is generally most qualified in the study area, followed by West Lancashire, Halton and Knowsley. Knowsley, and to a lesser degree Halton, have high proportions of people with no qualifications. Sefton has the largest proportion of residents qualified to the highest level (NVQ4 and above). It also has significantly large proportions qualified to NVQ1 and above. It therefore has the lowest proportion (15.0 percent) of the working age population with no qualifications. West Lancashire is well qualified in the context of the study area. It has higher proportions qualified to NVQ1 and above and a lower proportion with no qualifications.

Table 28 – Qualifications of Working Age Population

Qualification Level	Proportion of Working Age Population, percent						
	Halton	Knowsley	Sefton	West Lancashire	Study Area	North West	Great Britain
NVQ4 and above	16.8	13.5	23.3	22.1	19.6	24.8	27.4
NVQ3 and above	33.9	31.0	42.6	43.1	38.4	43.7	45.3
NVQ2 and above	57.3	50.4	64.4	65.6	60.0	63.6	63.8
NVQ1 and above	74.6	67.3	80.1	79.5	76.0	78.3	77.8
Other qualifications	5.2	6.1	4.8	2.9	4.9	5.8	8.5
No qualifications	20.2	26.6	15.0	17.6	19.1	15.8	13.8

Source: ONS Annual Population Survey, 2006

- 3.8 Knowsley is the 5th most deprived local authority area in England (out of 354 local authorities ranked by their average score at Super Output Areas) according to the Indices of Multiple Deprivation, 2007. Halton is the second most deprived in the study area, ranking 30th in England. Sefton is 83rd and West Lancashire 141st.
- 3.9 Table 29 illustrates the breakdown of employment of local residents, by main occupation group. The majority of the study area's occupation group proportions are in line with the North West. However, in general, the proportion employed in lower grade occupations are higher than average; the higher grades lower than average. The largest proportion is employed in administrative and secretarial occupations. The proportion employed in professional occupations is significantly lower than the wider averages.

3.10 In the study area, Sefton has the largest proportion of residents employed in the three highest grade occupations at 39.9 percent. Halton and West Lancashire have 31.8 percent each, but Knowsley lags behind with just 27.7 percent. All are less than Great Britain's average, and only Sefton betters the North West average.

Table 29 – Employment by Main Occupation Group

Occupation Type	Proportion of Working Population, percent						
	Halton	Knowsley	Sefton	West Lancashire	Study Area	North West	Great Britain
Managers & Senior Officials	11.6	8.5	16.3	10.6	12.7	13.9	15.3
Professional Occupations	8.1	6.4	12.5	6.5	9.3	12.0	13.1
Associate Professional & Technical Occupations	12.1	12.8	11.1	14.7	12.3	13.7	14.3
Administrative & Secretarial Occupations	14.0	14.3	12.9	19.2	14.5	12.7	11.8
Skilled Trades Occupations	8.1	13.5	8.8	11.1	10.2	10.5	10.9
Personal Service Occupations	9.7	10.6	10.0	7.5	9.6	8.6	8.0
Sales & Customer Service Occupations	12.8	8.9	10.6	8.2	10.2	8.3	7.6
Process, Plant & Machine Operatives	10.8	11.6	6.1	11.7	9.2	8.2	7.2
Elementary Occupations	12.7	12.7	11.4	10.5	11.8	11.8	11.5

Source: ONS Annual Population Survey, Oct 2006 - Sept 2007

3.11 Halton and Knowsley have the highest proportion of residents in elementary occupations in the study area. Halton also has the highest proportion in sales and customer service but the lowest in skilled trades' occupations. Knowsley has the highest proportion of employment in administrative and secretarial (14.3 percent), and skilled trade occupations (13.5 percent) in the study area. Sefton has a low proportion of people employed in skilled trades and as process, plant and machine operatives.

3.12 In West Lancashire, the proportion of residents employed in administrative and secretarial occupations is significantly higher (19.2 percent) when compared to the wider averages. This reflects the presence of Edge Hill University, Skelmersdale College, the local authority and two hospitals, as well as travel to work patterns that suggest higher qualified residents are accessing higher occupation jobs in neighbouring boroughs. The proportion employed in technical occupations and as plant and machine operatives is also high. Occupational groups which are under represented are professional occupations, personal service and sales and customer service.

Economic Activity by Industry Sector

3.13 Table 30 shows that the workforce of the study area broadly follows wider averages in categories such as construction; transport and communications; distribution, hotels and restaurants, and other services. It has a slightly higher proportion employed in manufacturing than Great Britain, but significantly more in public administration, education and health. The proportion employed in banking and finance is significantly below the wider averages.

Table 30 – Standard Industrial Classification Breakdown

SIC 92	Employment Structure, Proportion of Jobs, percent						
	Halton	Knowsley	Sefton	West Lancashire	Study Area	North West	Great Britain
Agriculture and Fishing	0.08	0.16	0.28	4.11	0.89	0.49	0.86
Energy and Water	0.44	0.06	0.12	0.06	0.17	0.34	0.59
Manufacturing	14.34	22.19	6.29	15.26	13.12	12.52	10.87
Construction	4.99	4.15	4.61	4.58	4.59	4.98	4.77
Distribution, Hotels and Restaurants	21.28	17.61	24.81	24.34	22.38	23.93	23.52
Transport and Communications	12.16	4.22	3.89	6.18	6.14	6.02	5.88
Banking, Finance & Insurance, etc	23.49	15.22	15.18	14.13	16.79	19.20	21.24
Public Administration, Education and Health	18.88	32.89	39.15	27.86	31.42	27.79	26.94
Other Services	4.32	3.48	5.67	3.45	4.50	4.72	5.28

Source: ONS Annual Business Inquiry, 2006

- 3.14 Considerably high proportions of Halton's workforce are employed in transport and communication and in finance and business services in comparison to the study area average. The proportion of jobs in public administration, education and health are lower than average.
- 3.15 Knowsley has a significant proportion (22.2 percent) of jobs in manufacturing, well above the study area average of 13.1 percent. Jobs in distribution, hotels and restaurants and transport and communication are lower than average.
- 3.16 39.2 percent of jobs in Sefton are in public administration, education and health, significantly higher than the study area. Proportions of jobs in manufacturing and transport and communication are significantly lower.
- 3.17 Despite a reported decline of 25 percent of the number of jobs in agriculture since 2001 (West Lancashire Economic Baseline Report, 2009), West Lancashire still has four times as many jobs in agriculture than the study area proportion. The district has slightly lower proportions employed in banking, finance and insurance and public administration, education and health.

Commuting Patterns

- 3.18 Analysis of the 2001 Census commuting data shows that the seven districts within the Liverpool City Region are strongly inter-dependent in providing jobs for their residents. For example around 53,000 residents of Halton, Knowsley, Sefton and West Lancashire commute into Liverpool.
- 3.19 Table 31 summarises the position between each of the seven districts, in terms of whether the emphasis is on in-commuting (IN) or out-commuting (OUT). What it illustrates is that, as might be expected, Liverpool as the core of the City Region is a net importer from all the other districts. Conversely, Wirral is a net exporter to each of the districts.
- 3.20 Of the four local authorities the subject of this study only Sefton exhibits some form of equilibrium, being a net exporter to Halton, Knowsley and Liverpool, but a net importer from St Helens, West Lancashire and Wirral. Halton is a net exporter to the adjoining Liverpool and Knowsley. For all other areas it is a net importer of labour. Knowsley is a net importer for all districts except Liverpool. West Lancashire is

primarily a net exporter, only from St Helens and Wirral are their greater numbers commuting in to the district.

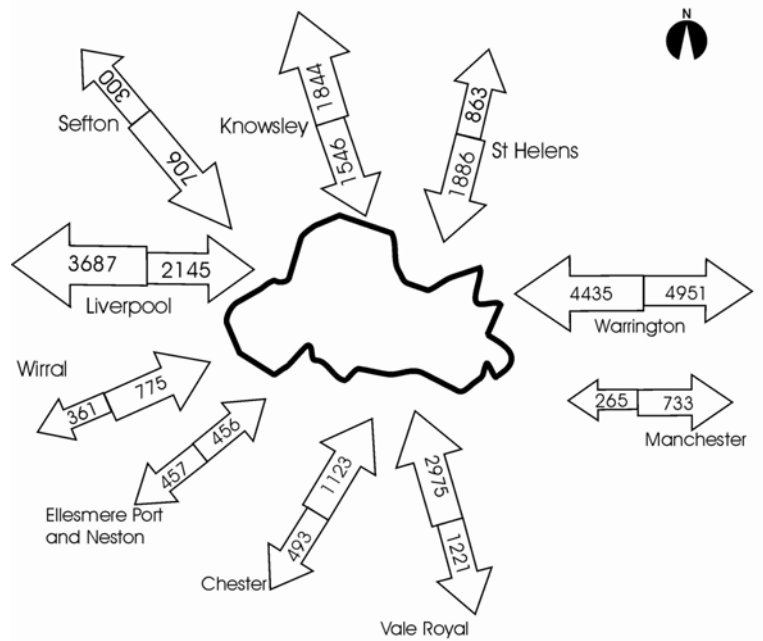
Table 31 – Commuting Patterns, Liverpool City Region – balance between in-commuting and out-commuting

From	To						
	Halton	Knowsley	Liverpool	Sefton	St Helens	West Lancashire	Wirral
Halton	-	OUT	OUT	IN	IN	IN	IN
Knowsley	IN	-	OUT	IN	IN	IN	IN
Liverpool	IN	IN	-	IN	IN	IN	IN
Sefton	OUT	OUT	OUT	-	IN	IN	IN
St Helens	OUT	OUT	OUT	OUT	-	OUT	IN
West Lancashire	OUT	OUT	OUT	OUT	IN	-	IN
Wirral	OUT	OUT	OUT	OUT	OUT	OUT	-

Source: ONS Census 2001

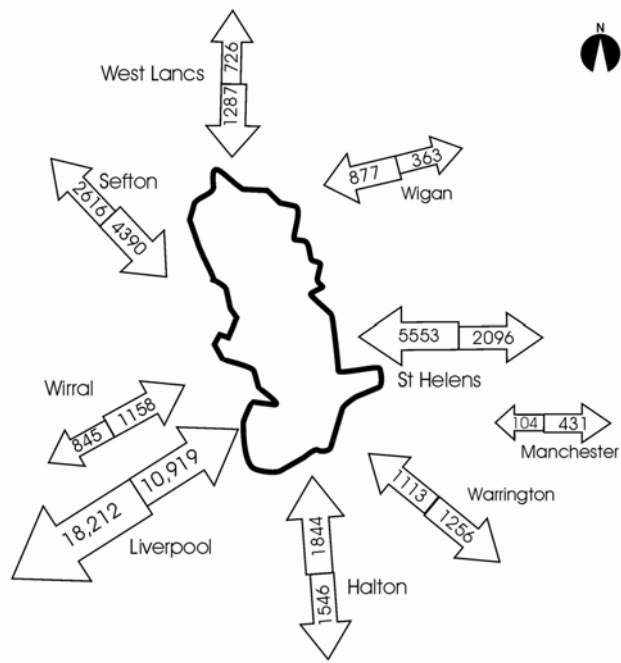
- 3.21 Figures 2 to 5 provide the commuting flows for each of the four study area local authorities. For three of the areas, the largest numbers of movements (in both directions) are with Liverpool. For West Lancashire however they are with Sefton.
- 3.22 As Figures 2, 4 and 5 illustrate, Halton, Sefton and West Lancashire also have strong links with locations outside the Liverpool City Region. Halton experiences significant in-commuting from Chester, Vale Royal (both now part of the Cheshire West and Chester Unitary Authority) and Warrington, with strong out-commuting flows to Manchester, Vale Royal and Warrington. Manchester, Preston, Warrington and Wigan are important commuting destinations for Sefton's residents, with only Wigan also being a strong source of imported labour.
- 3.23 West Lancashire's links with the adjoining Central Lancashire City Region are demonstrated by the level of flows (in both directions) with Preston, Chorley and South Ribble. Greater Manchester is also important with major flows to and from Wigan.
- 3.24 These inter-dependencies highlight the importance of joint employment land planning as employment land in one district can strongly affect commuting decisions of residents in other districts.

Figure 2 - HALTON - Commuting Flows



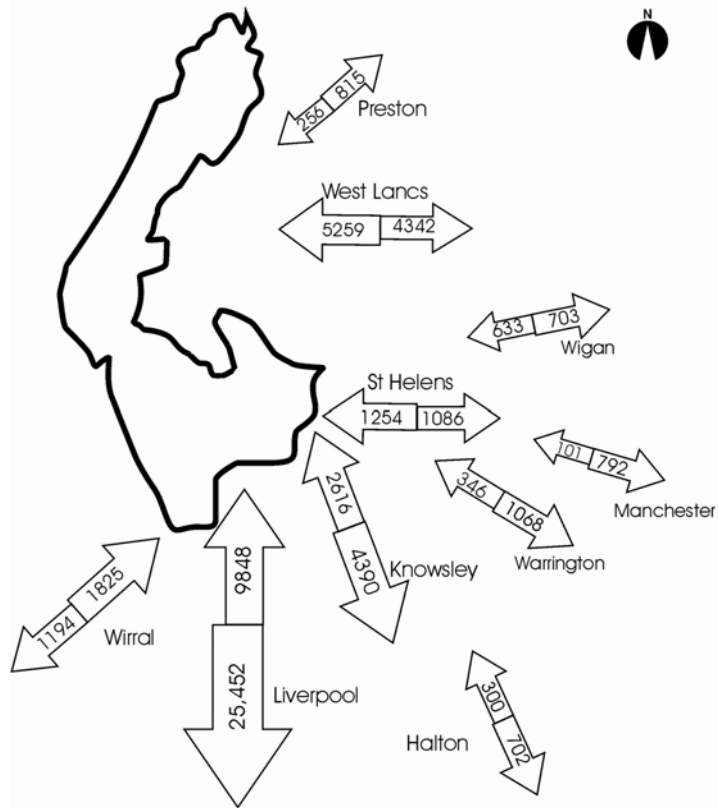
Source: ONS Census 2001 data

Figure 3 - KNOWSLEY - Commuting Flows



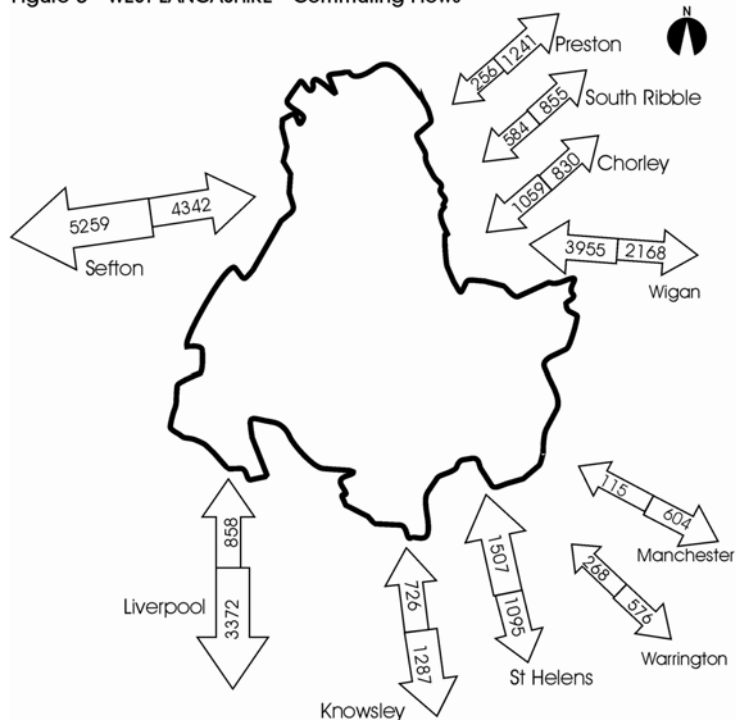
Source: ONS Census 2001 data

Figure 4 - SEFTON - Commuting Flows



Source: ONS Census 2001 data

Figure 5 - WEST LANCASHIRE - Commuting Flows



Source: ONS Census 2001 data

Number of VAT Registered Businesses

3.25 BERR data identifies that there were 13,590 VAT registered businesses operating in the study area at the beginning of January 2007 (see Table 32). Sefton has the most in the study area, 5765, 42.4 percent; followed by West Lancashire with just over a quarter. Halton has 17.8 percent, Knowsley 14.4 percent.

Table 32 – Total Number of VAT Registered Businesses

Area	December 1994	December 2006	Percentage Change
Halton	1860	2415	+29.8
Knowsley	1475	1960	+32.9
Sefton	5175	5765	+11.4
West Lancashire	3135	3450	+10.0
Study Area	11,645	13,590	+17.6
North West	160,365	186,020	+16.0
Great Britain	1,561,805	1,892,215	+21.2

Source: ONS Vat Registrations/Deregistration, 1994 and 2006/BERR, 2007

3.26 The number of VAT registered businesses in the study area increased by 17.6 percent between 31st December 1994 and 31st December 2006. An increase that was ten percent higher than the North West's rate but lower than Great Britain's.

3.27 Knowsley had the biggest increase of 32.9 percent, closely followed by Halton. Sefton and West Lancashire had the smallest increases of 11.4 and 10.0 percent respectively.

3.28 The total number of VAT registered businesses can be broken down further by industry sector. Table 33 shows that half the VAT registered businesses in the study area are in the wholesale, retail and repair and the property and business sectors. However, the proportion of businesses in the latter sector is lower than North West and Great Britain averages. The study area's proportions in the manufacturing, construction and transport sectors are slightly higher than the wider averages.

3.29 In Halton, the proportion of businesses in the property and business services sector (29.9 percent) is high in comparison to the study area (24.7 percent) and wider than the North West average. In part, this is likely to be due to availability of good quality office space in Halton. Schemes such as Daresbury Office Park are attractive to

companies in this sector. The proportions in the manufacturing and transport sectors are also higher than average.

- 3.30 In contrast, the percentage of businesses in the property and business sector in Knowsley is significantly low, but higher in most other sectors.
- 3.31 Sefton has the highest proportion of business in the wholesale and retail sector (27.6 percent), above the study area, North West and British averages. It has slightly lower averages in the manufacturing, transport and public administration, education and health sectors than the study area.
- 3.32 West Lancashire's business profile is generally in line with that in the study area, with the exception that it has a significantly higher proportion of businesses in the agricultural sector – 13.6 percent. This figure is also well above the North West and British averages.

Table 33 – VAT Registered Businesses By Sector

Sector	Percentage of VAT Registered Businesses by Sector						
	Halton	Knowsley	Sefton	West Lancashire	Study Area	North West	Great Britain
Agriculture	1.4	2.3	1.4	13.6	4.6	5.9	6.8
Energy and Water	0.2	0.0	0.0	0.1	0.1	0.1	0.1
Manufacturing	11.2	12.2	8.0	8.6	9.3	8.5	7.9
Construction	12.2	16.8	14.1	12.5	13.8	11.3	11.6
Wholesale, Retail and Repair	22.8	25.3	27.6	21.5	24.9	23.9	20.7
Hotels and Restaurants	6.6	7.1	8.5	6.2	7.4	8.0	7.3
Transport, Storage and Communications	7.7	7.7	5.0	6.7	6.3	4.9	4.4
Finance	0.8	1.0	0.8	0.7	0.9	1.2	1.1
Property and Business Services	29.2	19.4	25.5	23.2	24.7	28.0	31.0
Public Administration, Other Community, Social and Personal Services	6.4	6.6	7.1	5.7	6.6	6.6	7.7
Education, Health and Social Work	1.5	1.5	0.2	1.2	1.6	1.6	1.6

Source: ONS Vat Registrations/Deregistration, 2006

- 3.33 Looking at industry sector change between 1994 and 2006 (Table 34) the largest and most significant increase (81.4 percent) in the study area was in the property and business sector, which is in line with trends in the North West and Great Britain.
- 3.34 The study area has witnessed a considerable decline (16 percent) in the agriculture sector, especially so when compared to the regional and national figures. Although this figure is primarily caused by the loss of 115 businesses in West Lancashire over the period.
- 3.35 A slight decline was experienced in the manufacturing sector, but was less than in the North West/Britain; there was a more significant one in the wholesale, retail and repair sectors, but in line with the wider averages. All other sectors increased, except for energy and water which stayed constant.

Table 34 – Industry Sector Changes

Sector	Percentage Change of Businesses between 1994 and 2006						
	Halton	Knowsley	Sefton	West Lancashire	Study Area	North West	Great Britain
Agriculture	-12.5	+12.5	-5.9	-19.7	-16.0	-8.7	-10.1
Energy and Water	0.0	0.0	0.0	N/A	0.0	+9.5	+7.4
Manufacturing	+10.2	+9.1	-5.2	-9.2	-0.8	-10.6	-6.1
Construction	+18.0	+53.5	+26.4	+13.2	+25.5	+18.6	+22.5
Wholesale, Retail and Repair	-0.2	-2.0	-10.9	-14.5	-9.2	-10.2	-4.3
Hotels and Restaurants	+39.1	+40.0	+19.5	+30.3	+27.2	+19.3	+28.7
Transport, Storage and Communications	+27.6	+20.0	+3.6	+24.3	+16.3	+16.3	+20.0
Finance	+100	+300.0	-10.0	0.0	+33.3	+68.5	+28.6
Property and Business Services	+98.6	+153.3	+59.9	+96.5	+81.4	+84.0	+79.8
Public Administration, Other Community, Social and Personal Services	+40.9	+44.4	+6.5	+30.0	+21.1	+17.5	+13.7
Education, Health and Social Work	+40.0	+20.0	-12.0	+14.3	+2.4	+3.2	+20.6
Total	+29.8	+37.5	+11.3	+9.0	+16.6	+16.0	+21.2

Source: ONS Vat Registrations/Deregistration, 1994 and 2006

3.36 There has been a varied performance across all sectors in each LA area; and some are skewed by the total number of businesses in each sector, making the proportional changes more significant looking than they really are. But some of the key themes include:

- Knowsley increased its number of agriculture businesses
- Manufacturing increased in Halton and Knowsley
- Construction increased in all LAs
- Wholesale, retail and repair declined everywhere, but only marginally in Halton and Knowsley
- Hotels and restaurants increased in all LAs
- Transport, storage and communications increased in all LAs, but only marginally in Sefton
- There was no change in finance in West Lancashire and it actually fell in Sefton
- Property and business services increased everywhere, especially in Knowsley
- Public administration, other community, social and personal services also increased in all LAs, but less so in Sefton than elsewhere
- Education, health and social work increased everywhere except Sefton.

Numbers and Sizes of Businesses

3.37 95 percent of all businesses in the study area are classified as small (up to 49 employees according to DTI definitions) (see Table 35). 81 percent of them are micro businesses (up to ten employees). Only four percent of businesses employed 50 to 199 employees and only 150 businesses employ more than 200. Overall this is similar to both the North West and Great Britain averages.

3.38 Sefton and West Lancashire are similar in profile in that approximately 96 percent of businesses are small, three percent employ 50-199 people and less than one percent employs more than 200. 94.4 percent of businesses in Halton are small. A slightly higher proportion of businesses are medium-sized (employing more than 50-250) in Halton than in Sefton and West Lancashire. Knowsley appears to have the lowest proportion of small businesses (93.1) and the highest proportion of medium-sized businesses (6.9 percent employ more than 50 employees).

Table 35 – Business Numbers and Sizes

Area		Number of Employees				
		1-10	11-49	50-199	200+	Total
Halton	Number	2745	572	164	34	3515
	Percent	78.1	16.3	4.7	0.9	100
Knowsley	Number	2290	500	172	36	2998
	Percent	76.4	16.7	5.7	1.2	100
Sefton	Number	6996	1179	275	50	8500
	Percent	82.3	13.9	3.2	0.6	100
West Lancashire	Number	3238	497	111	30	3876
	Percent	83.5	12.8	2.9	0.8	100
Study Area	Number	15,269	2748	722	150	18,889
	Percent	80.8	14.6	3.8	0.8	100
North West	Number	204,417	32,827	7959	1817	247,020
	Percent	82.8	13.3	3.2	0.7	100
Great Britain	Number	1,978,266	286,877	67,616	15,670	2,348,429
	Percent	84.2	12.2	2.9	0.7	100

Source: ONS Annual Business Inquiry 2006

Geographic Location

- 3.39 Table 36 shows the distribution of office and industrial hereditaments (individual premises identified by the Valuation Office for the purposes of business rates collection). There are more than twice as many industrial units as offices in the study area. Over a third of the industrial units are in Sefton, Knowsley has the least. Offices are most abundant in Sefton (40 percent of the total) whilst West Lancashire has the lowest.

Table 36 – Distribution of Premises and Homeworking

Area	Number of Units		Number of People Homeworking
	Factories/ Warehouses	Offices	
Halton	1118	596	3100
Knowsley	892	412	2966
Sefton	1768	936	8734
West Lancashire	960	380	4715
Total	4738	2324	19,515

Source: ONS Commercial and Industrial Floorspace 2007
ONS Census 2001

Homeworking

3.40 The DTI Small Business Survey (2006) showed that 41 percent of businesses nationally are home-based. Based on the 2001 Census, homeworking in the study area accounts for 6.6 percent of the economically active working age population. Table 32 indicates the majority (45 percent) of the study area homeworkers are in Sefton. It should be noted there is difficulty in obtaining accurate figures for this sector. Whilst Census data can provide numbers of people who say they work from home, Business Link research for West Lancashire's Economic Baseline Study tends to indicate much lower numbers of home based businesses than might be implied by Census data. This is likely to be due to homeworkers, as opposed to home based businesses. The Business Link research identified 1258 home based businesses in West Lancashire, compared to the 4715 home workers according to Census data.

Socio-Economic Aspirations

3.41 The published Sustainable Community Strategies for the four local authority areas comment on aspirations regarding future economic activity and resident qualifications. These are summarised in Table 37.

Table 37 – Sustainable Community Strategies – Socio Economic Aspirations

Area	Aspirations
Halton Making it Happen in Halton 2006-2011	<p>By 2011</p> <ul style="list-style-type: none"> • Sustain GVA per capita at or above the regional norm • Increase the number of jobs by 10 percent • Bring 50 ha of derelict land back into beneficial use • Facilitate bringing to the market at least 100,000 sqm of new and replacement commercial floorspace • Increase employment rate by 2 percent • Reduce economic inactivity rate by 10 percent • Increase rate of self employment by 20 percent • Increase number of VAT registrations by 15 percent • Reduce adult numbers with no qualifications by 15 percent • Increase adult numbers at Level 3 by 25 percent
Knowsley Sustainable Community Strategy 2008-2023	<ul style="list-style-type: none"> • Have high quality employment areas which help to drive economic growth in Liverpool City Region • Expansion and development of existing business parks, including development of new sites (particularly for office premises)

Area	Aspirations
	<ul style="list-style-type: none"> • An extra 233 VAT registrations per year, with a further 2900 businesses located in Knowsley • 15 percent of business premises designated for office use • 12,500 more people in employment
<p>Sefton A Vision for Sefton 2006-2011</p>	<ul style="list-style-type: none"> • Capitalise on the Port of Liverpool as a driver of local economic development and employment • Discourage greenfield development and encourage brownfield development • Increase GVA per employee from 66 to 68 percent of the UK figure • Increase working age population proportion in employment from 73.9 to 74.5 percent • Stimulate the economic vitality and sustainability of Sefton's deprived communities, especially with HMR Pathfinder
<p>West Lancashire A Sustainable Community Strategy 2007-2017</p>	<ul style="list-style-type: none"> • Create a modern town centre for Skelmersdale, to include more jobs • Assist Ormskirk and Burscough to prepare improvement plans for these Market Towns • Commission and action rural economic study • Inspire Project – six mini projects relating to physical regeneration including employment area and premises improvements • Create more and better quality training and job opportunities to get more people into work

Source: LAs Sustainable Community Strategies

3.42 During the course of this study the West Lancashire Economy Study (2009) was published. Many of the findings of that study are of relevance to this report. These include:

- Strong employment growth since 2001, dominated by Skelmersdale and the Western Parishes (locations closest to Sefton)
- Low growth since 1998 in commercial office floorspace, especially by comparison to neighbouring authorities
- Factory floorspace has grown since 1998, in directly opposed performance to the region and all neighbours except Knowsley
- Very strong growth in warehouse floorspace since 1998
- Employment growth structure reflects high manufacturing employment (in relative terms) but low proportion of jobs in finance, IT and other business activities
- Business structure polarised with national/multinational employers in Skelmersdale and SME economy in rest of the district.

- 3.43 The study identifies a number of opportunities, including room to improve broadband, land and premises to attract the business services sector. Poor reliability and low speed of broadband is an obstacle for businesses (home based and otherwise) in the rural areas of West Lancashire. Comment is made of the perceived shortage of land for future employment area expansion, especially in Burscough.
- 3.44 Recommendations regarding land and premises are:
- Consider minor changes to the Green Belt boundary
 - Provide additional land to facilitate development or expansion
 - Assess the potential to re-model Skelmersdale's industrial estates to ensure more effective land usage
 - Development rural workspace – Burscough Wharf could be one hub
 - Start-up units and grow-on space should be developed on the outskirts of key services areas, to address currently limited supply of the right specification and in the right location.
 - Upgrade broadband internet connections.

Summary

- 3.45 The largest proportion of the study area's population of 656,400 is resident in Sefton (42.1 percent). The proportion of those economically active in the study area is in line with the North West and Great Britain. However the proportion is slightly lower in Halton, and significantly so in Knowsley.
- 3.46 The study area has a higher unemployment rate than the North West and national averages. It is particularly so for Knowsley. Residents are less well qualified in the context of the North West and Great Britain. Sefton is the most highly qualified area, closely followed by West Lancashire. Knowsley is the least qualified.
- 3.47 All four local authority areas in the study are in the upper half of the most deprived in England; Knowsley being the 5th and Halton the 30th most deprived. Sefton is the 83rd most deprived and West Lancashire the 141st.
- 3.48 NOMIS data indicates that the study area has proportionally more residents employed in low grade occupations (especially in Knowsley) and less people employed in higher grade occupations, than in the North West and Great Britain.

- 3.49 Over 30 percent of people are employed in the public administration, education and health sectors. Manufacturing employment is also above average. Banking, finance and insurance and other services are below average.
- 3.50 The rate of business formation in the study area, evidenced by VAT registration data, is in line with the region but lower than the British average. Certain sectors have grown strongly, for example: property and business services (which have almost doubled in most local authority areas); construction; and hotels and restaurants.
- 3.51 One quarter of the study area's VAT registered businesses are in the property and business services sector and one quarter in the wholesale, retail and repair sector.
- 3.52 Over 80 percent of the businesses are very small, employing up to ten people only. This is slightly lower than the averages for the North.
- 3.53 There are twice as many industrial premises than office units in the study area. Sefton dominates, having 38 percent of all hereditaments.
- 3.54 The local authorities published Sustainable Community Strategies seek to redress socio-economic issues, targeting improved GVA per capita; higher levels of people in employment; the generation of greater numbers of VAT business registrations and the delivery of remediated employment land as well as more commercial floorspace. For West Lancashire such issues are further emphasised in the recently completed Economy study.

4.0 PROPERTY MARKET – GENERAL

Introduction

- 4.1 This section analyses public sector property enquiries records, and considers the extent of inward investment in the study area. It continues with a review of property availability and overall floorspace stock. The section ends with information on general national property and business trends.

Public Sector Enquiries

- 4.2 Each local authority monitors enquiries from businesses looking for land and premises in its area. These companies are directed towards the relevant vacant commercial property registers. Each local authority has provided the enquiries received during 2006 and 2007. Although provided, 2008 has been excluded because it does not encompass a complete year. The results are analysed below. It should be noted that differences in marketing and promotion may skew the level of enquiries; Sefton outsources its enquiry monitoring to The Mersey Partnership (TMP); while each organisation records data differently, e.g. size bands, making a like-for-like comparison difficult in certain instances. Sefton observe that because of technical issues with the shared monitoring system with TMP not all enquiries have been recorded. As such the level of interest identified from the supplied data is less than the reality.
- 4.3 Table 38 shows the spread of recorded enquiries across the study area as a whole broken down by individual local authority area. There has been a slight fall between 2006 and 2007. Overall Knowsley leads the way with almost 40 percent of the enquiries; West Lancashire had over 30 percent.

Table 38 – Total Study Area Public Sector Enquiries

Area	2006	2007	Total	Proportion, percent
Halton	81	143	224	18.4
Knowsley	302	183	485	39.8
Sefton	67	58	125	10.3
West Lancashire	169	214	383	31.5
Total	619	598	1217	100.0

Source: Local Authorities 2008

- 4.4 Detailed breakdowns by type (industrial or office premises, or land) and size are provided in Appendix 5. These show that industrial enquiries have been almost double those for offices (699 compared to 356). Enquiries for sites represent about 10 percent of the enquiries total.
- 4.5 Demand is heavily weighted towards small premises. 60 percent are for premises of less than 500 sqm. Indeed 60 percent of the office enquiries are for premises of less than 100 sqm. This trend is replicated across all four local authorities.
- 4.6 83 percent of the land enquiries were for sites of less than 2 ha. Knowsley dominated the enquiries, with just over 70 percent being for the borough.

Inward Investment

- 4.7 According to data from the NWDA, overseas companies invested over £10 billion into the North West economy in 2007/08. This involved 156 projects. Many are related to advanced manufacturing and R&D. Some 14,600 jobs were created or safeguarded, double the previous year. New investments accounted for 43 of the projects, expansions 72 and acquisitions 41. Nearly 100 of the projects had some form of public support or intervention, although only 17 received grants. NWDA do not provide a breakdown of this data to local authority areas.
- 4.8 The Mersey Partnership market Merseyside to investors from outside the study area. Since 2005, almost 80 percent of the enquiries (where the source is known) came from North West England. TMP experience mirrors the local authorities' enquiry data, with greater numbers of industrial rather than office enquiries.
- 4.9 It should be noted that the way TMP recorded these enquiries makes it impossible to separate between each local authority area individually. Most enquiries were for more than one LA area. Therefore these figures record every time an enquiry mentions the LA, resulting in substantial duplication when compared to the original number of enquiries actually received.
- 4.10 The size emphasis of TMP received enquiries differs from those recorded by the local authorities. Almost 60 percent of the industrial enquiries were for properties larger than 1000 sqm. For offices the largest demand was for units bigger than 1000 sqm, but there was still reasonable demand in all size ranges up to 500 sqm. There were only 18 enquiries for office properties of 500-1000 sqm (6.7 percent).

4.11 More detailed analysis of TMP enquiries are included in Appendix 5.

The Mersey Partnership (TMP)

4.12 TMP comments that investment from the manufacturing/industrial sector mainly comes from existing Merseyside firms seeking to expand. Most LA areas have a good range of large industrial units, and if a firm does not specifically require a Liverpool City Centre location then it will normally be willing to look at any of these outlying areas. General points to note are that:

- Knowsley has the best road access and is popular with logistics/distribution firms
- Halton has the best science/high-tech offer, and also locations for the chemical sector
- Bootle is viewed as part of Liverpool, with companies moving fluidly across the border
- North Sefton is peripheral, and of little interest to the larger firms.

4.13 Overall, enquiries have dropped sharply over the last year due to the credit crunch. However, the remaining enquiries are stronger, and tend to come from companies that have to move for practical reasons (e.g. need larger space). It is believed that this trend will continue over the next few years, resulting in a slow but steady trickle of enquiries, until economic confidence is restored. It should be noted that West Lancashire's enquiry figures for 2008 have also seen a reduction as a consequence of the credit crunch.

4.14 On the office side, the Merseyside market has developed strongly over the last five years. There have been a number of high quality office developments, most of which are speculative. This has significant advantages when marketing an area, as it means that there are buildings to show potential investors – rather than looking at them off-plan. It also illustrates the strength of office demand, with developers willing to develop without first securing occupiers. Rental levels are low compared to London, and even Manchester and other regional cities, allowing Merseyside to compete for occupiers on a national level.

4.15 There have been office schemes developed in each local authority area, but the most successful have been in Bootle/Aintree and South Liverpool. This is due to their relatively central locations, and good access. Schemes in more peripheral locations

(e.g. Knowsley and Halton) have struggled, in TMP's opinion, to attract the interest of national/regional inward investors. Consequently they have been competing for the (increasingly limited) number of local Merseyside occupiers. Current economic conditions mean that some schemes are now standing empty and this will limit further office development in the short-to-medium term.

- 4.16 TMP state that the demand for land is limited. Most large firms generally have their own expansion space. Furthermore many large manufacturing and chemicals firms are consolidating multiple sites, freeing up space elsewhere. This is then either offered to compatible users or brought forward as redevelopment land. There is however some interest for sites, for example, telecoms is a strong sector at the moment. However, such demand tends to be for smaller sites (one hectare or less), with good access, and limited development constraints. These sites can usually be found as long as the company remains flexible regarding its location – which is not always the case.
- 4.17 TMP has provided details of successful completed investments from 2004/05 to 2007/08. Most of them are retained investment and expansion rather than new, first time investment. The successes are shown in Table 39. There is no data for West Lancashire. According to the data provided, Halton is by far the most successful location in terms of number of projects; however Knowsley has seen the most benefit in terms of employment. Sefton is the poor relation of the three.

Table 39 – TMP Inward Investment Successes 2004/05-2007/08

LAA	Number of Projects	New Jobs	Safeguarded Jobs	Number of First Time Investments
Halton	23	606	628	0
Knowsley	16	635	804	1
Sefton	12	130	335	2

Source: TMP 2008

Property Supply

- 4.18 A schedule of the floorspace being marketed in the study area (as at Autumn 2008) has been compiled from site visits, property databases, a trawl of commercial property agents and consultation with other stakeholders. The marketed space is taken to be a very close approximation to that vacant – obviously there may be occupiers waiting for interest in their property before moving or empty units not

actually being marketed. The schedules for industrial premises (including warehouses and workshops) and offices have been included in Appendices 6-9.

4.19 BE Group has assessed the vacant floorspace using three quality definitions. 'Good/New' is as it suggests, being new or modern fit-for-purpose accommodation. 'Moderate' is a wide category covering reasonable, fit-for-purpose premises. Much of this category will relate to buildings constructed between 1950s to 1980s. 'Budget' is low quality space that in terms of design, attributes and condition is at best functional, but may not be fit-for-purpose.

Industrial

4.20 Table 40 shows that there is 602,930 sqm of marketed industrial floorspace, made up of 369 properties, in the study area. There is a good range through each of the size bands. The greatest availability is in the 201-500 sqm and 501-1000 sqm categories – each have 71 properties.

4.21 Considering the LA areas individually:

- Halton has the most available properties – 30 percent of the total
- West Lancashire has the fewest premises on the market
- Knowsley has the most vacant floorspace – 40 percent of the total
- Sefton has the smallest amount of marketed floorspace
- The distribution of property through all local authority areas is reasonable
- There are relative shortages of small workshops (0-100 sqm) in Knowsley and West Lancashire
- Sefton has the least availability of larger premises (above 2000 sqm).

Table 40 – Amount of Marketed Industrial Property

LAA		Size Band, sqm							Total
		0-100	101-200	201-500	501-1000	1001-2000	2001-5000	5001+	
Halton	Floorspace, sqm	1208	1715	9223	6750	31,441	33,278	104,304	187,919
	Number of Properties	19	12	27	10	24	12	8	112
Knowsley	Floorspace, sqm	250	2330	5950	15,971	24,367	20,781	169,135	238,784
	Number of Properties	3	15	17	23	19	8	9	94

LAA		Size Band, sqm							Total
		0-100	101-200	201-500	501-1000	1001-2000	2001-5000	5001+	
Sefton	Floorspace, sqm	1356	3591	3665	9772	7630	13,072	18,896	57,982
	Number of Properties	19	26	13	15	5	5	2	85
West Lancashire	Floorspace, sqm	489	1853	5249	18,199	12,109	22,399	57,947	118,245
	Number of Properties	8	11	14	23	9	7	6	78
Total	Floorspace	3303	9489	24,087	50,692	75,547	89,530	350,282	602,930
	Number of Properties, sqm	49	64	71	71	57	32	25	369

Source: BE Group 2009

4.22 Table 41 shows that the majority of marketed space is moderate grade, accommodation. (The quality appraisal comes from an external inspection only and considers building condition, style, specification, servicing areas, eaves height and rental level). There are slightly fewer budget options than there are good/new premises. There are relatively few budget premises in Knowsley and little of good quality in West Lancashire. The other two local authority areas have a portfolio typical of the study area as a whole.

Table 41 – Quality of Marketed Industrial Property

LAA	Quality		
	Good/New	Moderate	Budget
Halton	16	67	29
Knowsley	30	53	11
Sefton	31	32	22
West Lancashire	6	50	22
Total	83	202	84

Source: BE Group 2009

4.23 There is far more leasehold, than freehold, space marketed. This is true of the study area as a whole as well as the individual local authority areas (see Table 42).

Table 42 – Tenure of Marketed Industrial Property

Number of Properties	Tenure		
	Leasehold	Freehold	Either
Halton	91	3	18
Knowsley	74	1	19
Sefton	63	10	12
West Lancashire	59	9	10
Total	287	23	59

Source: BE Group 2009

Halton

- 4.24 In Halton the good quality accommodation is available both freehold and leasehold and is spread between both Runcorn and Widnes. It is made up of the remaining unoccupied units in five or six newly developed schemes. The budget space is mainly in Runcorn, at Astmoor Industrial Estate. This reinforces the Halton Economic Review (2008), which comments that whilst there is plenty of industrial space, much is low quality, not suited to modern needs. Astmoor is highlighted because of its poorly specified properties of the wrong size (too large at 900-1800 sqm), which have suffered in the past from under-investment. However, Astmoor is now a Business Improvement District, which will deliver some physical improvements.

Knowsley

- 4.25 Good quality, freehold space is only available in Kirkby. However there is good leasehold accommodation on offer throughout the Borough. This is made up of a number of high bay distribution warehouses and schemes offering units for SMEs: Alchemy, Knowsley Business Park; Arbour Court, Knowsley Industrial Park; and a trade counters development Chapel Brook in Huyton. Indeed Chapel Brook accounts for 16 of the vacant, good quality units available.

Sefton

- 4.26 The only good quality industrial space available freehold in Sefton is at Vesty Business Park in Bootle. There are however good quality leasehold units on offer at the Bridgewater Complex, Bootle; Sefton Business Park, Aintree; Millers Building, Bootle; and Russell Road Enterprise Park, Southport. The last scheme provides the only five good quality units available in the north of the Borough. There is moderate and budget quality available throughout the Borough, however there are only three moderate quality units available freehold.

West Lancashire

4.27 Two schemes, Hattersley Court, Ormskirk and Merlin Park, Burscough, provide the only good quality industrial space in the District. Both schemes offer freehold or leasehold tenure options. The moderate quality accommodation (both leasehold and freehold is available) is generally spread throughout the District, but there is only one such marketed unit in Ormskirk. In terms of budget space, there is only one freehold, and only two in Skelmersdale – most of this space is in Ormskirk.

Offices

4.28 Table 43 shows that there is 64,911 sqm of marketed offices (333 premises). Over 60 percent is of 100 sqm or less. There is a good range of supply between 201 sqm and 500 sqm, although less than might be expected of 101 to 200 sqm. There is very limited availability beyond 500 sqm. Just over 3 percent of the stock, by number of premises, is above this size.

4.29 Considering the local authority areas individually:

- Halton dominates both floorspace and property availability – however this is, in part, because there are 91 vacant office suites or labs at The Heath Business & Technical Park, Runcorn (although the size of this scheme means that it is still 78 percent occupied)
- Sefton has the fewest properties on offer
- West Lancashire has the smallest amount of vacant floorspace – 11.8 percent
- Halton provides most of the smallest premises (those of less than 100 sqm) – again because of The Heath
- The largest available property is 5588 sqm, which is in Sefton
- West Lancashire has no space available larger than 1063 sqm.

Table 43 – Amount of Marketed Office Property

LAA		Size Band, sqm						Total	
		0-100	101-200	201-500	501-1000	1001-2000	2001-5000		5001+
Halton	Floorspace, sqm	4163	1731	9630	3670	3890	3422	-	26,506
	Number of Properties	126	14	34	5	3	1	-	183
Knowsley	Floorspace, sqm	722	1001	5894	2212	2759	4645	-	17,233

LAA		Size Band, sqm							Total
		0-100	101-200	201-500	501-1000	1001-2000	2001-5000	5001+	
	Number of Properties	24	6	16	3	2	2	-	53
Sefton	Floorspace, sqm	905	943	4112	550	1022	-	5588	13,120
	Number of Properties	15	7	13	1	1	-	1	38
West Lancashire	Floorspace, sqm	1817	2146	2293	733	1063	-	-	8052
	Number of Properties	37	13	7	1	1	-	-	59
Total	Floorspace	7607	5821	21,929	7165	8734	8067	5588	64,911
	Number of Properties, sqm	202	40	70	10	7	3	1	333

Source: BE Group 2009

- 4.30 There is a reasonable amount of good quality office space available, when viewed against the numbers of moderate and budget premises. However, Sefton appears to lack available good quality space. Knowsley and West Lancashire have very limited choice of budget space (Table 44).

Table 44 – Quality of Marketed Office Property

Number of Properties	Quality		
	Good/New	Moderate	Budget
Halton	39	128	16
Knowsley	13	38	2
Sefton	6	19	13
West Lancashire	32	21	6
Total	90	206	37

Source: BE Group 2009

- 4.31 All areas seem to have a reasonable amount of freehold availability. As in most areas, however, there is far more leasehold property than freehold (Table 45).

Table 45 – Tenure of Marketed Office Property

Number of Properties	Tenure		
	For Lease	For Sale	For Sale or Lease
Halton	151	1	31
Knowsley	40	-	13
Sefton	30	-	7
West Lancashire	34	-	25
Total	255	1	76

Source: BE Group 2009

Halton

- 4.32 Some of the good quality space is available both freehold and leasehold – the three schemes that deliver this are: Forward Point, Tan House Lane, Widnes; Turnstone Business Park, Widnes; and Whitworth Court, Manor Park, Runcorn. Halton’s figures are skewed by The Heath Business and Technical Park which contributes 91 of the vacant premises. The 91 total 2628 sqm and is made up of both office and laboratory space.

Knowsley

- 4.33 Kings Business Park and Prescott Business Park are the only locations where good quality offices are available. Both have leasehold and freehold availability. All the moderate and budget space is available leasehold only – there is nothing of this quality available freehold.

Sefton

- 4.34 The only available good quality offices in Sefton are No1 Atlantic Park; Priority Sites development at Vesty Business Park, and serviced offices at Bridgewater Yard (all Bootle). The Priority Sites space is available on either a leasehold or freehold basis, the others are leasehold only. The only moderate quality accommodation is in either Bootle or Southport. There is budget space in both the north and south of the Borough, however all of this is leasehold.

West Lancashire

- 4.35 Two schemes provide 31 of the 32 good quality premises in West Lancashire – Hattersley Court in Ormskirk and West Lancashire Investment Centre in Skelmersdale. Only the first scheme offers freehold availability. Windgate Business Park, Tarleton provides the other good quality space. All the moderate quality offices

are available leasehold only; but there are only four in Skelmersdale. The budget space is mainly leasehold; and there is only one available in Skelmersdale.

- 4.36 More detailed analysis of the industrial and office premises being marketed is provided for each local authority area in Appendices 6 to 9.

Valuation Office Data

Industrial

- 4.37 According to Valuation Office (VO) statistics there are 4738 industrial hereditaments in the study area, totalling 5,979,000 sqm. Out of all this space there are 369 marketed premises totalling 602,930 sqm (from Table 46). This suggests an overall 'occupancy rate' for the study area of 89.9 percent by floorspace. By premises numbers, it indicates that the overall 'occupancy rate' is 92.0 percent.
- 4.38 Knowsley provides by far the most stock of premises, over 2,000,000 sqm, followed by size by Halton, West Lancashire and then Sefton. Occupancy rates are highest in Sefton and West Lancashire. However this probably reflects the extent of new development that has taken place in Halton and Knowsley, rather than anything else.

Table 46 – LA Area Property Occupancy Rates - Industrial

LAA	Vacant, Marketed Space		Total Stock of Accommodation		Occupancy Rate, percent	
	Floorspace, sqm	Number of Units	Floorspace, sqm	Number of Units	Floorspace, sqm	Number of Units
Halton	187,919	112	1,602,000	1118	88.3	90.0
Knowsley	238,784	94	2,052,000	892	88.4	89.5
Sefton	57,982	85	1,051,000	1768	94.5	95.2
West Lancashire	118,245	78	1,274,000	960	90.7	91.9
Total	602,930	369	5,979,000	4738	89.9	92.2

Source: BE Group 2009/ONS 2007

Offices

- 4.39 There are 2324 office hereditaments in the study area, totalling 849,000 sqm. Out of all this space there are 333 marketed premises totalling 64,911 sqm (from Table 47 above). This suggests an overall 'occupancy rate' for the study area of 92.4 percent by floorspace. By premises numbers the overall 'occupancy rate' is 89.6 percent.

4.40 Sefton provides the greatest amount of office floorspace, 382,000 sqm, followed by Halton, then Knowsley and West Lancashire, which has only 74,000 sqm. Only Sefton has occupancy rates above the study area's averages (Table 47).

Table 47 – Local Authority Area Property Occupancy Rates – Office

LAA	Vacant, Marketed Space		Total Stock of Accommodation		Occupancy Rate, percent	
	Floorspace, sqm	Number of Units	Floorspace, sqm	Number of Units	Floorspace, sqm	Number of Units
Halton	26,506	93*	265,000	596	90.0	84.4
Knowsley	17,233	53	128,000	412	86.5	87.1
Sefton	13,120	38	382,000	936	96.6	96.0
West Lancashire	8052	59	74,000	380	89.1	84.5
Total	64,911	243*	849,000	2324	92.4	89.6

Source: BE Group 2009/ONS 2007

Note: *Figure reduced by 90 to reflect The Heath's supply to prevent distortion of figures

4.41 In assessing the supply side allowance needs to be made according to whether there are higher or lower levels of vacancies in the existing floorspace stock. A certain level of vacant property is generally required for the property market to function effectively. Recent employment land studies elsewhere have seen the equilibrium vacancy rate to be generally held to be around 7.5 percent of the total office and industrial stock.

4.42 Where the actual level of vacant floorspace is higher or lower than this 7.5 percent rate, this indicates the position is one of market disequilibrium. A vacancy rate above 7.5 percent suggests floorspace is oversupplied. A rate below 7.5 percent is an indication the floorspace market is undersupplied.

4.43 Some employment land reviews have used rates of 5 percent (for offices) and 10 percent (for industrial and warehousing space). In Table 48 these alternative yardsticks have been applied to the vacancy rates identified for each of the four local authority areas.

Table 48 – Vacant Floorspace, Market Equilibrium Status

	Halton	Knowsley	Sefton	West Lancashire
Vacancy Rate Total Stock	11.5	11.7	5.0	9.4
Over (Under) Supply 7.5	OVER	OVER	(UNDER)	OVER

	Halton	Knowsley	Sefton	West Lancashire
percent rate				
Vacancy Rate Office Stock	10.0	13.5	3.4	10.9
Over (Under) Supply 7.5 percent rate	OVER	OVER	(UNDER)	OVER
Over (Under) Supply 5 percent rate	OVER	OVER	(EQUILIBRIUM)	OVER
Vacancy Rate Industrial Stock	11.7	11.6	5.5	9.3
Over (Under) Supply 7.5 percent rate	OVER	OVER	(UNDER)	OVER
Over (Under) Supply 10 percent rate	OVER	OVER	(UNDER)	(UNDER)

Source: BE Group 2009

- 4.44 Whilst there are factors that influence the level of vacant stock (e.g. obsolescence; owners' aspirations for alternative use), Table 48 does highlight the challenge faced by Sefton. Sefton mostly exhibits current vacant stock levels substantially below the equilibrium rates. For Halton, Knowsley and West Lancashire the statistics suggest an oversupply of total stock, office stock and industrial stock – except for West Lancashire's industrial supply at the 10 percent vacancy rate.

Modern Occupier Needs

- 4.45 At this stage it is useful to consider what modern businesses are looking for in terms of their property, as well as those developers providing space for them. These are general comments and apply across the UK, as well as in the study area. They refer to typical property requirements.
- 4.46 There are two key property sub-markets to consider in understanding the demand for premises. The first is the demand from companies looking for sites for their own occupation; the second, which is necessarily derived from the first, comes from specialist property developers who will provide solutions for these companies.
- 4.47 Many end-user companies, especially small ones, looking for accommodation prefer occupying an existing building to either organising the construction of one for themselves or entering into a design and build agreement with a developer. This is due to the management time involved; while it may also be difficult to rationalise and visualise such an important acquisition off-plan.

- 4.48 Having premises built for own occupation requires a long lead-time to cover the planning, negotiation and construction time involved. Furthermore not every company wants a brand new building, partly because they are generally more expensive than second hand ones.
- 4.49 However the recent combination of low interest rates and the depressed stock market has led to an unusually large number of companies looking to own their premises (although current market conditions are softening this). One route to achieving this is by developing their own site, especially if they cannot find a suitable freehold property. Nationally most enquiries are for small sites of less than 0.4 ha in size.
- 4.50 Although design and build options can be convenient, they are quite expensive because the controlling developer makes its profit not only on the land sale, but also on managing the building process. Consequently if the company is able, some prefer to buy land direct and organise building contractors themselves. This is especially the case with lower value added industries where high quality buildings are of secondary importance.
- 4.51 Developers acquiring sites consider the nature of the market, as outlined above, as well as the potential for speculative development, i.e. riskier, supply-led, rather than demand-driven construction. They also prefer to acquire prominent, (easy-to-develop) greenfield sites close to arterial roads or motorways because irrespective of sustainable transport policies, private transport still predominates. They naturally want land that is attractive to end-users. Furthermore property development is intensely entrepreneurial and extremely price sensitive. So although land may be available on the open market, if it is at too high a price, then the developer will not acquire it.

Emerging Trends

Industrial

- 4.52 Occupiers are generally looking for smaller premises as average company size continues to decrease. In line with a healthy economy, rising aspirations and a concentration on higher value added activities companies are looking for higher quality accommodation. This means specifically dedicated, self-contained, secure yard areas, and for units over 2000 sqm the trend seems to be at least one dock

level loading bay and a 40 metre turning circle to allow heavy goods vehicles access into and out of the unit. Eaves heights are also continuing to rise from an average of six metres to more towards ten metres to allow storage racking and more efficient use of space.

- 4.53 Large requirements, above 10,000 sqm, are rare, and where they do exist are generally for distribution warehousing. Most of these are contract-led with a flurry of activity as a number of specialist distribution companies look for units, before one of them wins the deal. However these companies generally cannot wait for a bespoke warehouse to be built for them and so, due to the rarity of such large, available buildings their search areas are increasingly wide.
- 4.54 Freehold demand remains relatively strong as a result of the continuing low interest rates, poor stock market pension performances and increased private sector interest in property investment. This has (up until the credit crunch) resulted in an overheated investment market, rising values, lowering yields and led to property developers now being more willing to offer speculative, freehold buildings.
- 4.55 Outsourcing of many aspects of the production and distribution process has led to a declining need for traditional, large scale, all-encompassing manufacturing facilities. This is gradually being replaced by smaller, sub-assembly light manufacturing space. Shorter leases (five years) and break clauses (three years) are now becoming much more the norm.

Offices

- 4.56 The trend is for smaller office suites as average business sizes fall. There are two strands to this. Micro-businesses (those with less than ten employees) typically want serviced offices or similar types of easy-in, easy-out schemes that lower their risk exposure. Whilst small businesses (with 10-49 employees) are looking for offices in the region of 200-300 sqm, often they are satellite facilities for larger companies.
- 4.57 Improving technology means specifications are changing, for example wireless networks will soon make raised floors superfluous and make the conversion of Victorian buildings and the like easier.
- 4.58 In line with a healthy economy, rising aspirations and a concentration on higher value added activities companies are looking for higher quality accommodation. For

example air conditioning is becoming almost a standard requirement in new schemes, which pushes up rentals by £5-10/sqm per annum on average. Furthermore a proportion of occupiers (looking for more than 200 sqm) increasingly want self-contained premises, i.e. their own front door, toilets, reception, utilities, etc

- 4.59 Car parking is an issue for occupiers as the public sector works to manage car parking levels and encourage the use of sustainable public transport. However, more often than not, businesses cannot rely on public transport, especially in rural areas, and so there remains a strong demand for car parking spaces. Developers are starting to charge per car park space in major cities, and this is now occurring on out of town business parks in South Manchester and Warrington.
- 4.60 There is strong freehold demand for offices, as for industrial premises, for the same reasons as for industrial property. On the leasehold side, there is increasing demand for relatively short leases (one to three years), which helps account for the increasing popularity of serviced offices.
- 4.61 In the currently tight job market (i.e. low unemployment) and with increasing employee legislation, organisations are taking more care of their staff in ensuring accommodation is close to amenities, especially retail and leisure facilities. The Commission for Architecture and Built Environment research on the value of developing, owning and operating a typical office over the 25 years of a traditional occupational lease shows that, excluding land, 6.5 percent of the total goes on construction cost; 8.5 percent goes on furnishing, maintaining and operating the facility and 85 percent goes on the salary costs of the occupiers. Therefore factors that influence the effectiveness of staff, such as an improved working environment, are the factors that will have the greater financial/productivity gains.
- 4.62 Occupiers requiring higher skills, especially those linked to the Regional Economic Strategy's growth sectors will be concerned about access to an appropriate pool of skilled labour, which will drive demand towards city centres, research facilities and higher education institutes.
- 4.63 Property will need to be increasingly flexible to accommodate research-based manufacturing space as more complex processes develop, but still within an office environment.

- 4.64 International access and clustering around like-minded companies will also drive demand to key business park locations, with good availability of 'white collar', knowledge-based, skilled staff. However certain businesses will require a central conurbation, including those in creative industries, where face-to-face contact is important or where public transport is important to attract staff.

The Future

- 4.65 Central Government's most recent research providing a clearer economic and demographic context for future regional planning is Regional Futures: England's Regions in 2030, published in 2005. This report predicts that "*the number of jobs in the distribution and service sectors will increase by up to 600,000 and two million respectively over the next ten years*". This increase in service sector employment will result in 'an increase in demand for offices and higher density accommodation, whereas the increase in distribution will require locations with good strategic road and rail access'.
- 4.66 It is also worth highlighting some of the findings of the UK Government's Foresight Programme – a think tank predicting future trends and influences on the UK's socio-economic environment, operating as part of the Government Office for Science.
- 4.67 In 2005 it reported expectations that structural forces at work in the economy will create an explosion of SMEs (small and medium enterprises). This rapid growth and change will be driven by:
- Revolutionary advances in computing and communication technologies, especially the internet
 - Advances in other technologies such as material sciences and biotechnology
 - Growth in knowledge-intensive work supplanting labour-intensive industries
 - The rise of intellectual capital as the key value creation.
- 4.68 This will lead to new opportunities for SMEs. Many more will be in technology intensive sectors. Other opportunities will arise from large corporations outsourcing, unbundling or investing in start-ups. There will be parallel opportunities in the public sector – in health and care services for the elderly and the disabled.
- 4.69 Foresight consider the majority of today's SMEs will not exist in five years time and the majority of SMEs that will exist then do not exist today. This will obviously lead to

very dynamic business profiles in all areas increasing the emphasis on planning policy to be equally dynamic and flexible (e.g. by allowing uses changes within premises and making decisions quickly).

- 4.70 This will also see new ownership patterns (with more companies owned by women, minorities, and people in their 20s and 60s); intangible assets as the main drivers of value; SMEs acting in collaborative groups, in procurement for example; access to more financing options; and proportionately more companies trading internationally.
- 4.71 Although the industrial base in developed markets will continue to be eroded as jobs transfer to emerging markets, fears of the demise of Western manufacturing are unfounded. Developed manufacturing economies will still hold an advantage in high-value and capital-intensive activities; proximity to customers will also be critical for many.

Recession

- 4.72 During the course of this study, the UK has entered recession. The depth of this recession is not known, however it is affecting the general economy and property market. Businesses have reduced confidence and are reining in investment. Whilst the effect over the next two years may be severe it is expected that recovery will return the UK to its healthy state. While the effects of this recession cannot be ignored in the short term, and are recognised in this report, this study is for the period to 2026. The study therefore adopts a longer term view, and while economic growth and property investment is currently constrained, it should revert to longer term averages in the future.

Summary

- 4.73 In this sub-section the findings of the preceding research are drawn together into a number of conclusions.
- 4.74 Public sector sourced enquiries show that industrial need outweighs office. Most industrial demand is for units up to 500 sqm. Generally office occupiers are looking for 0-100 sqm premises. Inward investment enquiries tend to be larger, but again industrial demand outweighs office. They are spread throughout the study area, and most come from the North West region, rather than abroad.

- 4.75 There is a reasonable supply of industrial accommodation throughout the study area and each LA area. This generally holds true for all quality and tenure types as well. Sefton and West Lancashire have the smallest industrial availability; whereas Halton and Knowsley have the largest. There appears to be a shortage of workshops in Knowsley and West Lancashire. Office availability is also good, in terms of how it is distributed through the study area, its quality and tenure offer.
- 4.76 Assessing the existing vacant stock levels against a market equilibrium rate of 7.5 percent, indicates Sefton has an undersupply of both office and industrial floorspace. For the three other authorities the reverse is true. They have oversupplies of total stock, office stock and industrial stock.
- 4.77 The UK economy has entered recession over the course of this study. Although this will obviously affect future economic growth, property and employment land take-up rates in the short term, this report takes a long term view (to 2026). Over this period it is expected that trends will revert to their long term averages, even though the next two to three years will see a downturn.
- 4.78 Modern businesses (and developers) want easily developable, accessible, prominent sites for their premises. A healthy property market will have a mix of options: speculative development, design and build schemes and freehold plots for owner-occupiers to self-build. However development is entrepreneurial and not every company (looking for space) can realistically be satisfied all the time. The property market, by its nature, is inherently imperfect. Companies move from existing property to provide themselves with better, more efficient, cost effective accommodation of an appropriate size.
- 4.79 Modern trends are leading to more businesses that are on average smaller in size. They are more dynamic and technology driven. They come and go more fluidly.

5.0 STAKEHOLDER CONSULTATIONS

Introduction

- 5.1 This section provides general commentary on the property market of the study area, in terms of the elements addressed by this study i.e. employment sites, industrial, distribution and offices sectors. More detailed analysis of the individual sectors is made later in the report.
- 5.2 The commentary is drawn from consultations held with public sector agencies and other key stakeholders whose sphere of influence covers all or part of the study area. It should be noted that some of the comments may reflect the individual organisation's perception of the situation, reflecting the extent of their role and involvement, rather than being the complete picture.

General Comments

- 5.3 This section reviews the general comments received from stakeholders with regards to the study area as a whole, or for multiple local authority areas.

Northwest Development Agency (NWDA)

- 5.4 As the Regional Development Agency, the NWDA's remit covers all four local authority areas. It has little direct ownership of employment sites within the study area (only at Daresbury, Halton and Cronton Colliery, Knowsley). However through its Strategic Regional Sites and Single Programme Fund (both UK and EU funding) it has substantial influence in the delivery of employment land and premises.
- 5.5 EU funding is, in terms of the study area, primarily directed to development in Sefton and Knowsley. However ERDF funds have, and are being, used under Measure 4.3 (Sub Regional Employment Sites) for a sub regional employment sites programme for the rest of the North West. This has involved and continues to involve, activity in Halton (e.g. Widnes Waterfront; 3MG). This is less the case for West Lancashire.
- 5.6 As a consequence of the number of funding support applications received for B1 office schemes in Merseyside, the NWDA has commissioned a review of the office market. This is now published. Key findings are:
- The Merseyside office market has seen growth in stock since 2000 (it is now on a par with city-regions such as Cardiff, Newcastle, Sheffield), and the rental growth has been the fastest amongst the regional cities

- However rents still lag behind Manchester, Leeds and Birmingham (some £86-£108 per sqm lower), as does the amount of available stock
- By 2015 Merseyside will require between 220,000 and 280,000 sqm of net new office space. This figure rises by a further 100,000 sqm, if 'policy on' projections produced by Cambridge Econometrics are applied
- Although Liverpool City Centre will remain the focus for office development, the market share of out of town business parks has grown from practically zero to around 25 percent of the entire Merseyside office market in less than a decade.

5.7 NWDA involvement in employment sites in Sefton is identified as the Dunningbridge Road Corridor, Sefton. Designated as a strategic site with ERDF funding, as it is seen to support port related activities. As a key route into Merseyside, environmental upgrading is important, though this potentially causes problems with accommodating uses such as B8/container storage, which are port-related activities.

5.8 There is 620,000 sqm of potential new office development, which could be delivered over the next 7-10 years. However, the number of committed office schemes is low, and nothing is committed to be developed after 2011. Furthermore developers are likely to shelve many of these speculative office schemes due to the wider economic slowdown.

5.9 The extensive recent development in out of town office parks is considered to have pushed this market to saturation point. And freehold demand is declining. In the longer term, out of town schemes face stronger competition from developing markets in Liverpool City Centre and the major towns.

5.10 The report considers that Merseyside's large towns face challenges in kick starting their office markets (notably their lack of good quality development land), but the availability of services and the good strategic road access mean that they are likely to be the focus of future growth, along with Liverpool City Centre. Bootle and Kirkby are identified as two of these towns.

Homes and Communities Agency

5.11 As a consequence of the legacy of new town status in Runcorn and Skelmersdale, Homes and Communities Agency (HCA) retain some employment land ownerships in

Halton and West Lancashire. However, HCA is in the process of disposing of these landholdings. Previously held back by ground conditions, the sites have been remarketed and sold in larger plot sizes to overcome the difficulties associated in sorting out their remediation and associated subsidies. Once the land relating to these transactions has been developed, there will be no further vacant sites remaining at Manor Park and only Cobbs Clough (site DE 5.1.18) in Skelmersdale.

- 5.12 HCA's experience is that demand for land and property is greater in Skelmersdale than Runcorn. This is because Skelmersdale has direct access to the M58, and is strategically located between the M6 and the Liverpool conurbation. Land prices are at £618,000 per ha (for industrial uses) in Skelmersdale compared to £371,000-£494,000 per ha in Runcorn.
- 5.13 There is limited demand for property at the moment due to the wider economic slowdown. Skelmersdale has a limited office market, and most demand is for industrial and warehouse property. Runcorn has demand for offices, but this is met by schemes along the M56 corridor.

Other Public Sector Comments

- 5.14 This section reviews the comments received from public sector stakeholders with regards to the individual local authorities.

Halton Borough Council

- 5.15 There is still a divide between Widnes and Runcorn caused by the river and historic, political boundaries, where Widnes was linked to Merseyside, Runcorn to Cheshire. Companies are often unwilling to 'change sides' when looking for alternative property.
- 5.16 The Borough experiences a recognition problem. Halton is an unknown geographic entity to most companies, especially inward investors. Widnes still suffers in perception from its chemical heritage, which can put off potential investors at an early stage. Widnes also fares poorly in comparison to Runcorn because of its indistinct employment areas, many of which are lower quality and mixed with residential. Consequently there can be conflicts between different types of users in particular areas.

- 5.17 Some of the new developments in Widnes are contributing positively to an improved image for this part of Halton. This is primarily activity in and around 3MG and Widnes Waterfront. The Mersey Gateway Bridge has the potential to be a catalyst for positive change in some of the employment areas both north and south of the river.
- 5.18 The Council's perception is that the office sector is quite a slow market. There is a severe lack of supply in Widnes that should be rectified (in part) by developments at Widnes Waterfront. In Runcorn new development activity is largely confined to Daresbury, both the business park and the science park. There is very little interest in Runcorn Old Town.
- 5.19 There is still a desire from some quarters for a North Widnes Business Park, perhaps as a follow-on scheme once Widnes Waterfront has been completed. However it has previously been rejected by the Planning Inspector at the Inquiry into the Halton UDP.
- 5.20 Current activity in the industrial sector is largely taking place in Widnes. In the following paragraphs reference is made to ongoing or emerging projects that impact on employment land and premises provision in Halton.

Widnes Waterfront

- 5.21 This 140 ha brownfield redevelopment area comprises a mix of derelict, unused, underutilised, occupied sites to the east of the proposed Mersey Gateway Bridge. New development has taken place and there are a number of further proposals, to deliver B1, B2 and B8 accommodation, along with leisure, some residential and soft end uses, which are at various stages of progress. Development has been slower than expected because of delays in property acquisition negotiations, securing external funding, and land remediation issues.
- 5.22 When complete Widnes Waterfront is expected to have made a dramatic impact on the town, by bringing back into use for modern business (especially offices) an underutilised and formerly heavy industry area.

The Mersey Gateway Project (the second Mersey crossing)

- 5.23 The Mersey Gateway Bridge is due to open 2014 and will cross the river to the east of the existing Silver Jubilee Bridge. Its Runcorn landing point will enter the junction

of the A558 Daresbury Expressway, A533 Central Expressway and A533 Bridgewater Expressway. On the Widnes side it will join between the town centre and West Bank, linking the A557 Widnes Eastern Bypass and the A562 Speke Road to Liverpool.

- 5.24 The bridge construction will result in the loss of employment land on both sides of the river. To the south the impact will be upon the Astmoor Industrial Estate, one of Runcorn's original large New Town estates. Whilst this will reduce supply which will need to be replaced, it does present an opportunity to improve and regenerate an industrial estate that has become outdated and unattractive to modern businesses.
- 5.25 On the Widnes side of the Mersey the bridge will see the removal of mainly low grade business activity, such as scrapyards and container storage. However it will also affect the Catalyst Industrial Estate, owned by St Modwen.
- 5.26 In total 17.38 ha of developed employment land will be affected (12.03 ha in Widnes; 5.36 ha in Runcorn), with some 50-60 businesses possibly requiring relocation.

3MG

- 5.27 The Ditton Strategic Rail Freight Park emerged from the Mersey Freight Study undertaken in 1999, which identified the site as suitable for such a use. Consequently the Council worked to remove the site from greenbelt and make it available for development (marketed as the Mersey Multimodal Gateway or 3MG). The scheme covers 96 ha and has planning consent for 167,600 sqm rising to a possible 325,160 sqm of rail connected warehousing. Acquired by Stobart, development is now underway, with demolition on two sites and the construction of a 74,322 sqm warehouse for an occupier that will create 800 jobs.
- 5.28 Whilst 3MG has been identified by the NWDA as one of the North West's Strategic Regional Sites, it is now referred to in the RSS as an intermodal freight facility covered by Policy RT6. In accordance with paragraph 6.8 under Policy W3, future development at the site is, in theory, now excluded from the employment land provision figures.
- 5.29 However, as 3MG represents almost half of Halton's available employment land supply, the potential impact of its exclusion from future supply figures as indicated by the RSS, is something that is addressed elsewhere in this report.

The Mid-Mersey Growth Point

- 5.30 The Mid-Mersey Growth Point emerged from a successful Growth Point bid in July 2008 and includes Warrington, St Helens, and Halton. Growth Point status promotes an accelerated level of development above the RSS allocation, increasing provision to a minimum of 15,660 sqm by 2017. The Programme of Development 2009 has now been submitted to DCLG.
- 5.31 Whilst the emphasis is upon housing provision, the Growth Point proposals are of relevance to the employment land review of Halton. In particular the proposals for the development of 4000 dwellings of Runcorn Docks will see the loss from (port-related) employment use of circa 14 ha of land. This loss will be incremental, in that housing completions are currently estimated to be 100 units per annum, from 2011. Nevertheless the initial proposals tabled by Peel include the provision of B1 industrial accommodation, forming a buffer between the residential element and established industrial installations to the south. This section of the site falls within a Control of Major Accident Hazards (COMAH) consultation zone.
- 5.32 Another key development identified in the Programme of Development, which sees the loss of employment land, is the Routledge site at Widnes Waterfront. This has a resolution to grant planning consent, subject to a Section 106 agreement, and is planned to be a phased development of some 600 residential units, plus 2800 sqm of B1 offices, commencing 2010. The start depends however on completion of a new boulevard access. It is also understood the proposed developer is now reviewing the mix of residential units in the light of recent economic conditions.

Knowsley Metropolitan Borough Council

- 5.33 Knowsley remains a strongly industrial area. Recent demand has been strongest from logistics users (due to the good strategic road access) and environmental technology firms (partly due to the availability of land and property with permissions for chemicals uses e.g. Image Business Park). Demand is for units of 186-743 sqm, on long leases. Rents for average quality industrial space are £48 per sqm.
- 5.34 Most demand is sourced within Merseyside, although the last four years has seen inward investment attracted from 15 national and international firms. These include QVC, Asda, and further investment by Tata at Halewood. Overall the Council has recorded 31 successful inward investments (or reinvestments) between 2004 and

2008 (primarily into the Knowsley Industrial and Business Parks), creating 4703 sqm of new employment space and providing 1160 new jobs.

- 5.35 Generally Knowsley has a limited office market. Despite the initial high quality of infrastructure and office development at Kings Business Park, attempts to capitalise on this have stalled. Supply exceeds demand in Merseyside with new office developments in Liverpool, Knowsley, Sefton, and Halton all competing for tenants at a time of declining demand. Most demand is for small suites of up to 46 sqm, for local firms. There are a number of good quality business centres available to meet this need. Rents for average quality office space are £102-156 per sqm.
- 5.36 The greatest share of demand has focused on the Knowsley Industrial and Business Parks and this is likely to continue given their critical mass of existing businesses and good access to the strategic road network. Huyton also has a significant cluster of industrial firms and good access, although with a higher proportion of trade uses.
- 5.37 In principle Knowsley has a significant supply of undeveloped employment land, with several plots on the market. However, the majority of these sites are now committed for development or expansion. Large landowners (notably the Anglo Group, who have significant landholdings in Huyton) have proved unwilling to release further land for development. They are also land banking or only developing with pre-lets. The Eastern Compound Land (site E1, 18.50 ha), is owned by Tata and remains earmarked for the long term expansion of the adjacent Jaguar plant. There is perceived to be a shortage of small plots (0.4-0.8 ha) suitable for design and build schemes.
- 5.38 The Council recognises that the potential town centre locations for office developments are limited, apart from the proposed stadium site in Kirkby town centre. Sequential testing of sites for new office schemes is not therefore likely to be an issue.
- 5.39 Knowsley Council is concerned that the borough is now almost entirely dependent upon the private sector developer market, which develops at its own pace when profits are guaranteed and grant funding is available. This is unlikely to align to the pace the Council needs for economic development and physical regeneration activity to meet the borough's Sustainable Community Strategy. For example, to encourage

more start ups, the borough needs more small workshops – but these are not viable to the private sector unless heavily subsidised.

Sefton Metropolitan Borough Council

- 5.40 SMBC see Sefton as comprising two different property markets North/South Sefton. This disaggregation has been endorsed in previous studies and accepted by Planning Inspectors at UDP public enquiries. It is reflective of the economic reality in Sefton e.g. that companies in North Sefton (unless they wish to leave the Borough entirely) primarily wish to remain in North Sefton. North Sefton also has land supply constraints which are less pressing in the south. North Sefton (Formby and Southport) and South Sefton (the remainder of the borough) are therefore described separately.

North Sefton

- 5.41 North Sefton is perceived to have a low key property market, aimed at meeting local needs. Investment is from smaller firms, with historic links to the area. Southport can be attractive to office users in the legal and financial sectors and is seen as having a good environment for living and working. Formby attracts little interest from office and industrial firms. Formby Industrial Estate is dominated by trade uses.
- 5.42 Southport has a small cluster of light engineering and industrial companies at Slaidburn Crescent and Blowick Industrial Estate. There is some demand for budget units and expansion space of less than 464 sqm. Some space at Blowick Industrial Estate and Balmoral Business Park is not considered to meet modern occupiers' needs, offering potential redevelopment opportunities.
- 5.43 The office market is focused on Southport Business Park (the only source of larger office units) and Hoghton Street, Southport, which is the centre for the local legal and financial sectors. Demand is for suites of up to 93 sqm for small companies and start-ups.
- 5.44 There is a perceived shortage of available employment land in North Sefton, with most sites located in backland areas. Southport Business Park is likely to remain the only source of significant development plots, although planning is exclusively for B1 uses, and therefore exclude B2 and B8 uses. The land is also constrained by a need for piled foundations, and a low level of contamination. Demand is generally limited to local firms looking for expansion space.

- 5.45 North Sefton is peripheral to the strategic transport network and is therefore unlikely to be attractive to large firms or logistics users. However, the nature of the area makes it attractive to companies for whom a high quality environment is important.

South Sefton

- 5.46 South Sefton remains a strongly industrial area, although it is increasingly sharing in the developing office market of the Liverpool conurbation. Bootle Central Area has a number of large offices, with rents cheaper than those in Liverpool City Centre. Demand for these properties remains public sector led, but, new and refurbished office schemes at Dunningsbridge Road, Bridle Road, and Aintree Racecourse Business Park are now attracting a significant cluster of large private sector companies.
- 5.47 North Liverpool and the Bootle port area operate as a single market, with a significant supply of budget industrial space plus some recent refurbishments. Most demand is local, but Sefton Council receives regular enquiries for land and property from larger industrial firms. Demand is for industrial space of up to 8361 sqm, and small plots of 0.8 ha suitable for design and build schemes.
- 5.48 Available employment land is considered to be in short supply, with developers land-banking many sites due to the wider economic slowdown. This constraint may be partially addressed by the redevelopment of some of the older industrial space around the Port of Liverpool. However, the Port has its own land needs and would like to see space made available for complementary uses.

NewHeartlands Housing Market Renewal Pathfinder

- 5.49 The NewHeartlands Housing Market Renewal (HMRI) Pathfinder is a sub-regional programme which extends from Central Liverpool to South Sefton, and also includes parts of eastern Wirral. It covers 130,000 properties, housing approximately 252,000 people. The initiative seeks to tackle vacant or low value housing primarily through direct physical interventions (refurbishment and redevelopment).
- 5.50 There are 22,000 homes in the South Sefton Pathfinder area. The Pathfinder proposes to demolish 1300 homes over the 15 year lifespan of the project, while 1700 new homes will be built (the majority to house displaced households). Thus the

potential change in population resulting from the Pathfinder programme will be marginal.

5.51 20.25 ha of employment land (representing seven sites) are being acquired for residential developments over the next 5-10 years, primarily along Hawthorne Road, Bootle. All these locations comprise either cleared but heavily contaminated land, or low grade buildings in poor condition associated with contaminated sites:

- Former Penpoll Trading Estate, Hawthorne Road 2.20 ha
- Pine Grove 0.72 ha
- Former Toprain Site, Hawthorne Road 1.36 ha
- Former Tannery, Hawthorne Road 1.64 ha
- 511 Hawthorne Road 1.70 ha
- 499-509 Hawthorne Road 3.62 ha
- People's Site 9.01 ha

5.52 Although it appears the Pathfinder programme is not set to create new industrial premises, there are proposals for new local retail centres in the neighbourhoods of Bedford/Queens and Klondyke. These centres may include some small offices for local firms.

5.53 In BE Group's opinion it is important to ensure a balanced approach, with opportunities for employment protected in the HMRI area, to meet the needs of the existing and new population. This would also accord with the Sustainable Community Strategy aspiration of ensuring HMRI communities are economically viable and sustainable. This could be achieved, in addition to the local centre developments, by windfall employment sites where housing might no longer considered to be appropriate e.g. Millers Bridge/Derby Road.

Atlantic Gateway

5.54 The Atlantic Gateway Strategic Investment Area is a sub-regional programme which extends from Liverpool City Centre to the Port of Liverpool, Sefton, and along the A5036/Dunningsbridge Road Corridor. It brings together European Objective One and local authority funding to support site development, town centre regeneration, the Stepclever Programme (supporting business incubation space in South Sefton) and transport infrastructure improvements. The programme ended on 31st December 2008. In South Sefton it has delivered:

- £1.8 million in infrastructure improvements to the Atlantic Park Site, Dunningsbridge Road (Site BL112/ED3.2)

- 1278 sqm office and industrial space at Aintree Racecourse Business and Retail Park
- 15 new business units (3063 sqm of new floorspace) at Sefton Business Park, off Bridle Road, South Sefton
- A three-storey office building and 15 industrial units (3300 sqm of new floorspace) at Bridgewater Yard, Canal Street
- The 3100 sqm South Sefton Investment Centre (site BL253 - Vermont House, 375 Stanley Road), in Bootle Central Area. Completed in December 2008, it is leased to the South Sefton Development Trust who are providing space to start-ups and SMEs
- Infrastructure and transport improvements across the Bootle Central Area
- 3850 sqm of offices at Atlantic Park, completed October 2008
- 4085 sqm of offices at Atlantic Park, completed November 2008.

5.55 In considering new office developments in the Borough, the Council sees that employment opportunities and associated environmental improvements arising from such projects will be of greater importance than the sequential testing process.

West Lancashire Borough Council

5.56 The Borough Council considers Skelmersdale as a separate property market offer from the rest of the district. Hence comments are provided firstly on Skelmersdale and then on the other areas, primarily the market towns of Burscough and Ormskirk.

Skelmersdale

5.57 Skelmersdale contains a significant cluster of large industrial firms, which generates demand for larger industrial units of more than 929 sqm. The XL logistics/distribution park at Stanley Industrial Estate has proved a significant draw for inward investment. There is a shortage of smaller industrial units of less than 464 sqm to meet local needs, the existing small space is often of poor quality, and badly located on backland sites.

5.58 Skelmersdale has a limited office market, although attempts to develop high quality offices at White Moss Business Park have proved successful. Away from White Moss, office supply is limited to older, budget space, which may not meet modern occupiers' needs.

- 5.59 Most demand comes from Merseyside and Greater Manchester. The Council has recorded 19 successful inward investments (or reinvestments) into West Lancashire (all to Skelmersdale) between 2005 and 2008. These include industrial and warehouse space for Walkers and Marks and Spencer.
- 5.60 Notwithstanding the evidence of other areas of Liverpool City Region, West Lancashire Council's experience would indicate there is demand for sites, for specific types of build. These comprise long leasehold sites; design and build by end users; small scale B8 uses. Evidence from the stakeholder events conducted as part of the Economic Baseline study also supports this. There is demand but suitable sites are not necessarily available.
- 5.61 There is perceived to be a shortage of available employment land in Skelmersdale, with only one significant undeveloped site (Cobbs Clough, site DE 5.1.18) remaining. This could be partially addressed by the redevelopment of some older industrial space, which no longer meets modern requirements. However, it is not clear if complex redevelopment sites would be taken up in the present market.

Other Areas

- 5.62 Burscough has a strong office and industrial market, attracting business from North Sefton and Central Lancashire. The area benefits from a lack of competing property in North Sefton, and all of the recent office and hybrid developments have proved popular. Again there is perceived to be a shortage of available employment land. Future land allocations would have to focus on Burscough Industrial Estate as there are no real alternatives.
- 5.63 Ormskirk is a market town, dominated by retail and trade uses. Demand for office space comes from legal and financial services companies who can usually find space in the town centre or at the Malthouse Business Centre. There is little demand for industrial property or land.
- 5.64 The Council has noted demand for employment space in rural communities that have good access to the strategic road network, primarily in Appley Bridge and Tarleton. Several good quality office/industrial schemes have recently been completed in these areas and there are further planning applications being considered. Further rural employment schemes could be accommodated through barn conversions or the redevelopment of existing, low quality industrial space. In communities more distant

from the main road network, demand is generally for conversions to residential uses rather than employment.

- 5.65 Most of West Lancashire now has broadband access, but speeds remain low and further upgrades will be needed to keep pace with change. Without this there will be constraints to home-working and self-employment – both of which are strong elements of the district's economic structure.

Market Towns Initiative

- 5.66 The Council has produced Market Towns Action Plans for Burscough and Ormskirk, which consider the future development of these towns in terms of employment, transport, accessibility, and community. The Ormskirk Action Plan focuses on the need for more retail and leisure space in the town centre. The use of upper floors for additional retail and office space is considered, but no defined plans are put forward. The initial 'health check' of Ormskirk did not identify any demand for further office or industrial space, with a number of refurbished schemes already available to meet local needs.
- 5.67 Economic policies within the Burscough Action Plan focus on developing incentives for attracting and retaining businesses to existing employment properties. There are no plans for new development or refurbishment of office or industrial space. The initial health check identifies Burscough as a focus for rural business, with industrial employment focused on the logistics and agricultural supply sectors. The Council is currently progressing applications for the funding to deliver these Action Plans.
- 5.68 The Council, despite the 5 ha allocation for employment use associated with Skelmersdale town centre, does not consider sequential testing to be a major constraint to future office development proposals. The need to develop further the office market sector is seen as being of greater concern.
- 5.69 West Lancashire's rural areas, outside of the key service centres of Burscough, Ormskirk and Skelmersdale, were the subject of a Rural Economy Study produced in 2006/07. The study confirmed the entrepreneurial emphasis of the rural areas – over half of the district's companies; 40 percent of the jobs; a higher business start up rate than the district as a whole. The northern parishes have a major food cluster based around horticulture. Other clusters exist in engineering and construction products manufacturing.

- 5.70 There is a need for rural business space, with a lack of proper start-up or move-on business space. In this respect the study recommended funding should help finance the conversion of disused agricultural buildings into employment space; consideration of live/work space and of a business development centre.

Other Comments

- 5.71 This section reviews the comments received from private and voluntary sector stakeholders with regards to the individual local authority areas. These cover a wide range of topics and are set out on a local authority by local authority basis.

Halton

Halton Chamber of Commerce

- 5.72 The Halton Chamber of Commerce consider that the market for office and industrial property in Halton is local, with good demand from start-ups and new businesses. Occupancy rates for the three managed workspace schemes owned or operated by the Chamber (Percival Lane, Runcorn and Moor Lane/Waterloo Road, Widnes) are high. There is a shortage of good quality incubation space.
- 5.73 Halton has also seen growth in high-tech businesses and a range of specialist sectors, focused on defined schemes such as The Heath and Daresbury Science and Innovation Campus. Demand for larger space is more limited, with strong competition from rival schemes in Warrington, Manchester, and Liverpool.
- 5.74 The Chamber believes that Halton remains a good environment for businesses. Despite the loss of some re-processing operations overseas, the manufacturing sector remains strong. Additionally, the borough continues to attract investment from large multinational firms, notably INEOS, The Stobart Group, Diageo, and O2. There are some skills shortages (particularly IT workers), but this reflects the rapid pace of changing requirements in Halton and is not a significant barrier to growth.
- 5.75 The Chamber considers that Runcorn and Widnes now operate as a single market, linked by the present Silver Jubilee Bridge. Its view is that the historic divisions between the two towns are no longer relevant in the global market.

Weston Point Docks

- 5.76 Stobart Group has acquired Weston Point Docks (HBC site 299) to be renamed Mersey Gateway Port. The Port will feed goods to larger ships in the Mersey Estuary and Irish Sea. The Port will take up all the remaining undeveloped land at Weston Point (4.43 ha). Some demolition and reclamation work has commenced, but the port development plans are now on hold due to the economic recession and credit crunch. For the time being the site is being used by Stobart Group for its own vehicles storage.

The Halton Chemicals Sector

- 5.77 In response to the requirements of the study brief, an overview has been carried out of the chemicals industry sector in Halton. This has involved consultations with companies based in Widnes and Runcorn, as well as with other sector related organisations.
- 5.78 The views and data gathered from these consultations are summarised below.
- 5.79 Widnes Waterfront and Rocksavage, Runcorn are two of the main areas for heavy industry in the study area. Previously dominated by the chemicals sector, several of the large employers in these areas have recently moved production facilities elsewhere, prompting concerns about the long term future of this industry. However, a survey of ten large chemicals companies shows that while firms are consolidating their production facilities, most are committed to maintaining and updating their presence in Halton. Halton is also a growing centre for support and R&D companies linked to the chemicals industry. Such firms want flexible office and lab space in existing schemes such as The Heath.

Chemicals North West

- 5.80 Chemicals North West represents the chemicals industry across the region. It believes that the recent economic slowdown, combined with high energy prices has strongly impacted on the profitability of the chemicals sector regionally. However, Halton retains the largest individual cluster of chemicals firms in the North West. Existing firms are maintaining and updating production facilities, but are unwilling to risk expansion in the present economy. One exception is Bayer Crop Science, who is in the process of closing its production facility in Widnes.

- 5.81 Halton's strength is its ability to provide space both for production facilities, and for support and R&D firms. Most recent growth has been in support industries, which reflects the wider trend for larger firms to sub-contract R&D and technical problem solving to specialist consultants. Support firms are usually small (less than 30 employees) and require flexible office and lab space of less than 279 sqm. Space is available at The Heath and Daresbury Science and Innovation Campus (there are 30 existing chemicals sector businesses at these locations).
- 5.82 Most firms are consolidating uses on existing sites, so have no further land requirements. However, any land freed up by consolidation is not suitable for uses outside of the chemicals industry. Chemicals North West highlight that firms wish to see existing exclusion zones around plants protected. Many feel that residential and other employment uses are being allowed to develop too close to chemicals facilities. The primary concern is that this will increase the risks for conflict or litigation.

Halton Borough Council

- 5.83 The Borough Council recognises that most recent growth in the chemicals sector has been in support and R&D companies. It does not envisage demand for significant new production facilities in the present economy. Thus the base of companies is diversifying, although the numbers employed in the sector are not increasing significantly. There is plenty of office and lab space available at The Heath and Daresbury Science and Innovation Centre to meet the needs of support firms. Both schemes have plans for further expansion.
- 5.84 Although Halton has lost some production facilities, the Borough Council feels this trend is unlikely to continue. Large chemical firms (particularly those with a production element) have considerable resources invested in Halton, and prefer freehold or long leasehold occupation. Consolidation of functions is therefore more likely than relocation.

INEOS

- 5.85 INEOS own and operate the largest chemicals facility in Halton, comprising 200 ha across the Rocksavage area of Runcorn. The plant produces a range of bulk products (notably chlorine) and employs approximately 1300 people.
- 5.86 INEOS feel that the recent economic slowdown, combined with high energy prices has strongly impacted on the profitability of the chemicals sector (INEOS are

developing a number of facilities to improve their energy efficiency). This may result in some large producers relocating facilities overseas, but the general trend is to consolidate facilities on existing sites. This frees up land, but the resulting space is generally only suitable for other chemicals uses. Many companies are letting space to support companies that will complement their operation. INEOS have 5.72 ha of land available (in nine plots) which it is informally marketing to compatible industries.

- 5.87 Any reductions in production facilities are matched by growth in support and R&D companies. These are attracted to Halton both by the critical mass of existing chemicals firms, and by the availability of high quality lab and office space at facilities such as The Heath and Daresbury Science and Innovation Campus.
- 5.88 INEOS do ship some products by sea and rail, but most transportation is by road tanker. They consider Halton has good access to the strategic road network, while the new Mersey Gateway Bridge will increase accessibility between Runcorn and Widnes.

Omega, Warrington

- 5.89 The study brief calls for consideration of the likely impact on Halton's employment land requirements due to the proposed Omega development at Warrington.
- 5.90 The potential impact of Omega on Merseyside as a whole is referenced in the Merseyside Employment Land Study (2004). That study notes Omega has the ability to absorb approximately three years take-up or demand for the whole of the Merseyside and Halton sub-region (West Lancashire is excluded from this calculation). The fact that Halton Borough Council sits on the Omega Skills Challenge Group reinforces the importance, to at least Halton's labour market, of Omega.
- 5.91 The Omega site is split north and south of the M62 motorway. It comprises five phases of development. Phases 1 and 2 are considered to be part of Warrington's local employment land allocations (a total of 91.15 ha). Phases 1 and 2 comprise areas either side of the M62. Phases 3 to 5, are identified as a North West Strategic Regional Site (130 ha) and are located south of the M62.
- 5.92 At present only Phases 1 and 2 have planning consent - and this is only outline. The Omega North site is identified as Phase 1a. It totals 31.39 ha and has consent for no

more than 148,500 sqm of B2 and B8 space. Indeed as no more than 44,550 sqm is to be B2 space, the majority of the site is for B8 warehousing and distribution.

- 5.93 Phases 1b and 2 are permitted to provide up to 130,000 sqm of B1 space. There is no stipulation that this is to be B1 offices, although this is the intimated intention of the developers. Together these phases total 59.76 ha. The outline consent also extends to a further 11,150 sqm of C1 (hotel) use and 1200 sqm of use class A floorspace.
- 5.94 Whilst site demolition works have commenced on the Omega North site, no detailed planning applications have been submitted, so the timing of development activity remains uncertain.
- 5.95 At this time it is difficult to categorically state how Omega will, or might, impact on Halton's employment land provision. Reasons for this are:
- Phases 1 and 2 represent local employment land allocations, and in this respect should be treated no differently to other local authorities' allocations
 - The scale of B2 floorspace permitted within Phase 1a (Omega North) is limited to one third of the development, i.e. 9.40 ha. This is not sufficient to impact of Halton, even in terms of provision in Widnes
 - The bulk of Phase 1a is to be B8 accommodation. Only at 3MG is there a large scale distribution space opportunity in North Halton – but this is targeted at rail related freight operation. It is therefore a different sector of the distribution market place
 - Phases 1b and 2 relate to B1 only uses. The scale of proposed provision and the target market is not on offer in Widnes. Nor is there scope to provide it. It is potential competition for Daresbury – but this serves the M56 rather than the M62 market
 - There is no certainty that the Omega Strategic Regional Site (130 ha) will come forward (in part or in its entirety); there is no agreement as to the content of any proposed development (this may well see arguments being made for mixed-use rather than just employment activity). Nor is there an identified programme/timescale to determine this.
- 5.96 Consequently it is concluded that at this point in time, Omega is unlikely to impact on Halton's employment land supply – at least for the next five years. There may well

be need to revisit the situation once plans emerge for the Strategic Regional Site element of Omega.

Parkside

- 5.97 Attention is however drawn to the possible impact on the 3MG development at Ditton that might arise from the Parkside Colliery rail freight interchange proposal.
- 5.98 This proposal extends to 272 ha, all of which is in Green Belt. A planning application was submitted about 18 months ago. The Highways Agency has now withdrawn its objections, and St Helens Council and the developers are in the final throes of resolving the traffic management proposals. Development will be conditional on the re-construction of Junction 22, M6 and construction of two rail sidings, to ensure it genuinely delivers an inter-modal freight facility.
- 5.99 RSS policies RDF4 and RT8 allow changes to Green Belt boundaries, through LDFs, to accommodate the inter-modal terminal. Thus, Parkside remains as a strategic regional site in the recommendations of the NWDA's 2008 review, and is recognised in RSS as one of the North West's key inter-modal freight interchange facilities.
- 5.100 The nature of Parkside means it will be in direct competition with 3MG. As the latter represents almost half of Halton's available land supply, this could be a threat in the longer term. At present 3MG has the advantage of being operational, with planning consent and additional development is underway. The earliest anticipated date for Parkside to be developed, assuming planning permission is granted, is 2014.

Office Development

- 5.101 Halton Borough Council has indicated it would like to increase the supply of offices in Widnes, Runcorn and Halton Lea town centres. However development land is constrained at all three locations. Therefore sequential testing of new office development sites is likely to be of lower importance when assessing new proposals.

Knowsley

Knowsley Economic Partnership/Knowsley Chamber of Industry and Commerce

- 5.102 The Knowsley Economic Partnership and Knowsley Chamber of Industry and Commerce made similar comments, and are strongly linked as organisations. Thus their comments are considered together. Until the start of 2008, the two organisations considered Knowsley to be a developing market, with a large number

of companies looking for labour. Most demand for employees came from manufacturing and logistics firms, primarily in Knowsley Industrial and Business Parks and Huyton Business Park. However, growth in this sector is now declining due to the wider economic slowdown.

5.103 Inward investment has declined alongside local demand. However prior to the present slowdown, Knowsley was seen as having strong demand from regional and national firms in the manufacturing, warehousing, and logistics sectors. The two organisations believe that Knowsley can return to a high rate of investment, once the wider economy recovers, for several reasons:

- A low cost base, which is cheaper than competing centres (notably Warrington, Liverpool, and Manchester)
- The availability of a skilled workforce
- Excellent access to the strategic road network, with minimal congestion.

5.104 The present economic weakness limits demand for office and industrial space. The remaining demand is for leasehold industrial properties of 93 sqm, to meet the needs of local businesses. There are shortages of such small, budget industrial space. Larger units of 929 sqm or more (of which Knowsley is oversupplied) struggle to let. Kings and Prescott Business Parks were creating a modest market for offices in a previously industrial area, but this has stalled in the present economy.

5.105 Knowsley has sufficient employment land to meet its current needs, with supply spread across the Knowsley Industrial and Business Parks and Huyton Industrial Park, as well as Prescott. However, few sites are being brought forward for development and many owners have been land banking in anticipation of future market improvements. The present economic slowdown has encouraged developers to sell land for design and build schemes, rather than engage in speculative development.

5.106 Despite the present economic slowdown, the two organisations believe that Knowsley remains a good environment for businesses. The critical mass of existing firms and the strong support of the Borough Council were highlighted as positive factors.

Marshall CDP

5.107 Marshall CDP own Kings Business Park, Prescot, which includes three allocated employment sites (Sites 118, 181, and 182). Marshall bought Kings in 2006, when it had outline planning permission for 32,516 sqm of offices and existing office developments for Vertex (3019 sqm) and CSC (3484 sqm). Marshall subsequently built Puma Court (seven self contained offices, 575-779 sqm in size, now sold to Kenmore Group) and Tiger Court (12 self contained offices, 74-480 sqm in size). Both schemes have been slow to let in the present market, Tiger Court remains 60 percent vacant almost a year after completion. Marshall are presently developing an 1858 sqm office for Alternative Group, which will take up the western half (approximately 1 ha) of site 181.

5.108 Space remains for a further 7432-9290 sqm of office space at Kings Business Park, including:

- 3066 sqm on the remainder of site 181 (approximately 1.15 ha, marketed as Lion Court)
- 4923 sqm on the southern third of site 182 (approximately 2 ha, marketed as Leopard Court)
- The refurbishment of Hazels House (site 118) to provide 1393 sqm, possibly including some leisure facilities.

5.109 Marshall are in negotiations with a number of companies to bring forward individual plots for design and build schemes (future speculative space is dependant on demand). There is no timetable for bringing forward these sites; it depends on Marshall's ability to secure pre-let agreements. The remaining land at site 182 (approximately 4.5 ha) contains Tree Preservation Orders (TPOs). Marshall believe this land is unsuitable for development.

5.110 Kings Business Park has been one of the NWDA endorsed 25 strategic regional employment sites. However, following a review during 2008, the site is one of seven now being recommended for deletion from the revised sites schedule. This reflects the site's advanced stage of completion.

Sefton

Sefton Chamber of Commerce

5.111 Comments by Sefton Chamber of Commerce focused on Bootle Central Area, and

are considered separately (see below).

Peel Ports

- 5.112 Peel Ports own and operate the Port of Liverpool. The operational land area within Sefton extends to 246.6 ha. This is used for the P&O ferry terminal shipyards, warehousing and open storage. A further 92 ha comprises dock facilities, extending into the Mersey. Operational land is divided between Peel's own uses and lettings to a range of port-related industrial occupiers. All land is in use or committed to future expansion and there are no plans to release any space for alternative uses.
- 5.113 Peel is in the process of developing 96,433 sqm of warehousing space between Derby Road and Regents Road, Sefton. This is part of the 'LIFT' multi-modal logistics and distribution scheme. A further 17 ha will be reclaimed from the River Mersey for the 'Post Panamax' container terminal, to be developed for further logistics space.
- 5.114 The logical expansion of the Port would be to develop on the 28 ha immediately adjoining the northern boundary of its operational area. However, this land is a designated Site of Special Scientific Interest. To secure this area for port expansion. Peel would first need to acquire and establish a replacement SSSI site in relatively close proximity. This could take several years to achieve.
- 5.115 One option for Peel would be to expand the Port into the Regent Road/Derby Road area of South Sefton. However, this would include a public highway (Regent Road) in the Port area, and require the purchase of a number of high value uses along the road frontage with the relocation of businesses. To achieve this would require the use of CPO powers as well as partnership working with Liverpool City Council, NWDA and HCA/Liverpool Vision in terms of their landholdings and regeneration plans for Liverpool North Shore.
- 5.116 Peel-owned land at Liverpool Waters cannot be used for port expansion due to the shallow river depth, size of the available docks, and the presence of listed buildings (this area is part of a World Heritage Site). It might be possible to free up existing land within the Port by removing empty containers to offsite storage. However, this would take up employment land elsewhere in South Sefton and Liverpool, and would likely raise planning application objections because of the use (unsightly; no jobs).

5.117 The Port therefore has land requirements that cannot be accommodated within its present area. The need for expansion space is likely to become more acute as the container capacity of the Port is expected to almost double by 2010, from 800,000 containers per annum, to 1.5 million. Peel has recently had to turn away a number of potential occupiers due to lack of space, most notably a requirement from Tesco for a 93,000 sqm logistics centre (now lost to Teesport, Redcar).

Combined Property Control (CPC)

5.118 CPC manages the landholdings of Mr and Mrs Weiss, who recently purchased the freehold to 12 industrial estates, across South Sefton, from the Borough Council. CPC confirm that the Weiss's retain ownership of these estates and have no short term plans for change. It declined to comment further.

Alliance and Leicester

5.119 Alliance and Leicester own a 10.8 ha (approx.) office site, off Bridle Road, in Bootle, South Sefton. Alliance and Leicester do not have plans to expand this facility, nor to release any of the undeveloped land. Nor can they confirm the extent of the undeveloped area. Proposed changes are limited to the refurbishment and remodelling of existing buildings. Alliance and Leicester has recently been acquired by Banco Santander, but it is not yet known whether there this will impact on the use of the South Sefton site.

Sefton Chamber of Commerce

5.120 Sefton Chamber of Commerce employs a town centre manager to market Bootle Central Area, including the Bootle Office Quarter. The Chamber considers that Bootle Central Area has historically been dominated by large public sector occupiers (including Sefton Council, Inland Revenue, and the NHS). As a legacy of this, most of the office supply consists of large suites (more than 139 sqm) in multi-storey office blocks. Most of the stock is more than 25 years old.

5.121 The Chamber believes that Bootle Central Area is losing out to Liverpool City Centre, which has developed a lot of high quality office space over the last five years. By comparison there has been little new development in Bootle Central Area, and the existing stock increasingly no longer meets modern requirements (although most buildings are capable of refurbishment).

- 5.122 Most demand is for leasehold office space of less than 93 sqm from local firms, particularly from the large number of small firms that occupy space surrounding the Central Area. Such companies want flexible, budget or moderate space, which is not provided by the present offer. The Chamber is presently working with the Sefton HMR programme to look at opportunities for creating small office units above shops.
- 5.123 The Chamber of Commerce see the Central Area as a key economic driver for the borough, as its transport links are very good, with two train stations and excellent bus access from Liverpool. And it attracts 10,000 commuters and shoppers a day.

West Lancashire

North and Western Lancashire Chamber of Commerce

- 5.124 The North and Western Lancashire Chamber of Commerce comment that West Lancashire has a weak property market, with few companies looking for land or property. The lack of demand is due to the wider economic slowdown, rather than any deficiencies in supply. In the Chamber's view supply exceeds demand for all types, and sizes, of office and industrial property (although evidence elsewhere in this report does not sustain this opinion). Whilst the area has seen considerable speculative development over the last few years (notably in Skelmersdale, Burscough, and Tarleton), the Chamber feel that such new properties are now struggling to let.
- 5.125 Despite recent office developments, Skelmersdale remains dominated by larger manufacturing and storage firms. Demand for labour remains high but companies are increasingly unwilling to invest in expansion space in the present economy. In Burscough and Ormskirk the strongest demand for employees comes from service sector companies, especially the financial services sector. While this sector remains strong, the Chamber has not noted any significant demand for property. In rural areas, the agricultural supply and distribution sectors dominate. However, both have suffered from high fuel prices and the wider economic slowdown.
- 5.126 The major towns of West Lancashire do attract commuter traffic, notably from North Sefton and Central Lancashire. The Chamber believes both Burscough and Ormskirk suffer from congestion on their major access roads. Congestion at the M6/M58 junction during the morning and evening peaks is a barrier to accessing Skelmersdale from the east, but the local road network within Skelmersdale usually flows well.

Lancashire County Developments Limited (LCDL)

5.127 LCDL manages the landholdings of Lancashire County Council. In West Lancashire, this includes the Stanley Extension Site, Skelmersdale (sites DE5.1.14a, b, and c). However, the majority of this land has now been sold to Asda and Comet, with two undeveloped plots (sites DE5.1.14b and c) acquired by Gazeley in 2005. LCDL still own site DE5.1.14a (1.89 ha), which it intends to bring forward for sale as small freehold plots (0.2-0.4 ha), for owner occupation.

Summary

5.128 In concert with the economic structural shift towards service sector activity, the Liverpool City Region has experienced a growing office market. This has included some degree of development in each of the four local authority areas, though the scale of provision varies considerably.

5.129 The short term is now likely to see further development stall due to the wider economic downturn whilst longer term growth in the sector is expected to remain focused on Liverpool City Centre. The conclusion of recent market research is that there is further potential in peripheral locations within the city region. However this depends on resolution of constraints in access and land supply provision.

5.130 Consequently whilst all four local authority areas have endeavoured to expand beyond their historic industrial base, through the development of significant new office schemes, these must now compete in a shrinking sub-regional office market. This is likely to result in a slow down in the take-up of employment land for B1 office use, at least for the next two years or so. Within Sefton, in Bootle, there is particular concern about the large-scale level of outdated multi-storey office stock. In Knowsley the concern is that there is only one large, prestige office development and this is controlled by a single developer. Opportunity and choice is therefore constrained.

5.131 Manufacturing and distribution/logistics functions are important contributors to the economies of all the local authorities. Demand from these sectors continues and in Knowsley, Sefton and West Lancashire the local authorities perceive there to be potential shortages of available, appropriate sites to meet these needs.

5.132 All four local authorities recognise the valuable role that business incubation, managed workspace and 'grow on' premises for start up companies play in delivering

a ladder of accommodation. In Sefton the Stepclever programme and South Sefton Investment Centre are already providing incubation space. However, across all the study area there is concern that more provision of these kinds of facilities needs to be available.

5.133 Most parts of the study area are considered to have good access to the strategic road network. The exceptions are North Sefton and the rural areas of West Lancashire. Halton has a number of large planned infrastructure projects to further improve transport and accessibility, to the benefit of its employment sites.

5.134 The Port of Liverpool is an economic driver for the whole of Merseyside, and indeed the North West region. However, it is increasingly constrained with insufficient land to meet projected future needs. Further growth of the Port is likely to be difficult without a comprehensive partnership approach between Peel, Sefton, Wirral and Liverpool and possibly even West Lancashire, to address how the growth needs can be satisfactorily resolved. This will include reconciling the port related functions such as container storage or warehousing, with local authority objectives of improved environments and higher job creation activities.

5.135 In Halton, the chemicals sector remains strong, and the borough retains a significant base of large production firms despite the wider economic slowdown. However, most future growth is likely to be in smaller support and R&D companies. These are more dynamic and technology driven. They come and go more fluidly.

5.136 Whilst most stakeholders consider there to be a continuing separation of property market demand between Widnes and Runcorn, there is also a view expressed by others that this is no longer the case.

6.0 PROPERTY MARKET – ANALYSIS

Introduction

- 6.1 This section considers the supply and demand conditions in the property market in the study area. It is important to consider this as a prelude to understanding the need for land, as the demand for land is essentially derived from the demand for property.
- 6.2 The analysis is broken down by local authority area and focuses on the industrial and office property market. Industrial space, in this instance, refers to accommodation for manufacturing, storage, distribution and warehousing purposes, together with smaller workshop premises. The analysis also breaks down within local authority areas to the differing locations identified in the study brief (e.g. Halton is split to Widnes and Runcorn).
- 6.3 The findings are from consultations with private sector stakeholders. These are detailed in Appendix 10. Appendix 10 also provides details of the performance of a selection of industrial and office schemes in each local authority area.
- 6.4 The views and information gathered reflect the varying degrees of involvement in the study area by the consultees. For some, who are marginally involved, there is a greater emphasis on perceptions rather than practical experience of the local markets. However, the majority are directly and actively involved, either as developers, investors or agents on schemes in the area.
- 6.5 In general stakeholders consider that the study area currently has a weak property market, reflecting the wider economic slowdown. Supply is considered to exceed demand for most sizes, and types, of property. Typically the industrial market is viewed as stronger than that for offices. It remains concentrated in the long established industrial areas, notably South Sefton, Widnes, Knowsley Industrial and Business Parks and the former new towns of Skelmersdale and Runcorn.
- 6.6 Modern industrial businesses increasingly want good quality, well located premises close to the major road network on flexible, short term bases. Most demand is either from small, local firms looking for leasehold space of up to 186 sqm, or from larger firms, for long leasehold/freehold space of more than 929 sqm.

- 6.7 Generally there is a limited office market across the study area with the possible exception of the M56 corridor, Runcorn. Recent attempts to develop high quality offices in each local authority area have met with varying degrees of success. Further development is seen to be stalling due to the declining market, influenced by the economic downturn. Most demand is for small suites of up to 186 sqm, for local firms.
- 6.8 In Halton, both Runcorn and Widnes are seen as having plenty of industrial space, although some of the lower quality space (notably at Astmoor Industrial Estate, Runcorn and central Widnes) is not considered to meet modern occupiers' needs. There has been considerable new development of industrial and warehouse space at Manor Park and Widnes Waterfront, although this does not meet needs for smaller, budget space. There is some demand for industrial units up to 279 sqm and larger 929 sqm plus schemes.
- 6.9 In Knowsley demand (mainly industrial) is focused on the Knowsley Industrial and Business Parks, which have a critical mass of existing businesses and good access to the strategic road network. Some older property no longer meets modern requirements, but there are a number of good quality refurbishments underway, subdividing larger units. Stakeholders express the view that there is sufficient land to meet future needs. There is some demand for industrial units up to 464 sqm and larger 1393 sqm plus schemes. New office schemes at Prescott have met with limited success. Demand remains for smaller office units of less than 279 sqm, again with some additional demand for larger space (up to 929 sqm) from larger firms.
- 6.10 In Sefton, demand (again mainly industrial) is focused on areas of South Sefton close to Liverpool, and along key transport routes. South Sefton is viewed as having plenty of industrial space, although some older space does not meet modern occupiers' needs. Demand is for industrial units of up to 464 sqm. The office market is changing as a number of new high quality schemes have proved successful in attracting inward investment that might otherwise have gone into Liverpool City Centre. North Sefton has a lower key property market, aimed at meeting local needs. It suffers from a lack of budget and moderate quality industrial premises. Surprisingly little reference was made to Southport Business Park, whereas the equivalent flagship office developments in the other local authority areas were acknowledged. This may be because the Business Park has largely served as a location for bespoke design and build units for owner occupiers.

6.11 In West Lancashire, Skelmersdale is the focus of activity. Here industrial supply is focused on providing space for large firms and there is a shortage of smaller units of 279 sqm to meet local needs. Demand for serviced offices has largely been met by the West Lancashire Investment Centre, although there is some demand for budget units and expansion space of less than 186 sqm. Burscough has established itself as an attractive rural employment centre with demand for office and industrial space of less than 464 sqm. The Burscough Employment Areas are now fully developed out, and there is a lack of available development land.

Employment Area Assessments

6.12 BE Group have reviewed a total of 92 Employment Areas (urban and rural); Opportunity Sites and Action Areas across the study area. Each has been appraised and assessed through a combination of site visits, local intelligence and the views of those involved in the property market in those areas.

6.13 Proformas have been completed for each area and are accompanied by site plans. These are included at Appendices 11 to 14. The proformas adopt the following format, to simplify the data and make it easier to interpret. The 'Address' contains the local authority's designated title for the area, including where necessary the main street and town. The local authority's planning policy descriptor is provided. A brief 'Description' is provided in the form of BE Group's comment on the area. Area boundaries are based on GIS plans provided by the local authorities.

6.14 Where feasible the 'Total Number of Units' within the area has been identified from the physical site survey. For Halton's sites this information accompanied the study brief. 'Vacant or Derelict Units' have been identified from a combination of the site surveys and interrogation of the data collated for the vacant property schedules (Appendices 6 to 9). The proportion between these two equates to the 'Occupancy Rate'. The 'Vacant or Derelict Units' numbers reflect the situation at April 2008, to align with the employment land position date.

6.15 'Predominant Use Class' identifies whether buildings in the area are mainly in office/light industrial (B1); general industrial (B2) or warehouse (B8) uses.

6.16 An indication is provided of the age of properties in each of four categories assessed in 'Buildings Age'. These are pre-1945; 1945-1990; 1990-2000; 2000+(new).

6.17 'Buildings Quality' is also broken down into four category assessments. 'Derelict' is

self evident. 'Poor' represents low quality design, externals, and condition. 'Good' equates to modern design, building condition, parking and external area provision. The remaining category is 'Average', covering properties that do not fit any of the other three headings.

- 6.18 'Area Size' is the hectareage calculated from GIS, and the polygons provided by the local authorities. Where there are differences with areas separately supplied as part of the information background, these are highlighted on the proformas. These primarily reflect sites in Halton.
- 6.19 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. This has been based on a number of factors – critical mass of the area, companies like to cluster; accessibility, the closer to motorways and arterial roads the better; prominence, to main roads, and environment – setting of the location, servicing, parking and landscape treatment. For each element assessments are made as Poor, Average or Good. Combining this data leads to an overall hierarchical assessment banded A to E. These are described in Table 49.

Table 49 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect Support
C		
C/D	Lower quality locations in residential areas suffering from poor accessibility and massing.	Continue to protect/review through the LDF
D		
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments.	Promote alternative uses if possible
E		

Source: BE Group

- 6.20 Vacant land is identified, as is the scope for remodelling of particular properties or sites. Greenfield expansion possibilities are also included. All of these are identified,

for simplicity, as Regeneration Opportunities (on the plans accompanying the site proformas).

6.21 Finally the future role of the area is set out. This incorporates both BE Group's recommendations and appropriate main employment property market segments and sites, as set out in ODPM Guidance on Employment Land Reviews. These are:

- Established/Potential Office Locations
- High Quality Business Parks
- Research and Technology/Science Parks
- Warehouse/Distribution Parks
- General Business/Industrial Areas
- Heavy/Specialist Industrial Sites
- Incubator/SME Cluster Sites
- Specialist Freight Terminals
- Sites for Specific Occupiers
- Recycling/Environmental Industries Sites.

6.22 It should be noted some areas reflect more than one of these classifications of market segments.

6.23 The template for the area's proforma is included at Table 50.

Table 50 – Proforma Template

Address		Category to link LA policy description	
Description		Grade Critical mass: Accessibility: Prominence: Environment: Total Grade:	
Total Number of Units	Vacant	Occupancy Rate, percent	
Predominant Use Class (B1, B2, B8)			
Buildings Age			
Nos – Pre 1945	1945-90	90-2000	New 2000+
Buildings Quality			
Nos – Derelict	Poor	Average	Good
Area Size, ha			
Regeneration Opportunities (size, ha)			
Recommendations for Remodelling			
Future Role			

Source: BE Group 2009

Halton

6.24 Table 51 provides the assessment of 18 Employment Areas and 2 Regional Investment Sites in Halton. This is split between sites in Widnes and Runcorn. As is the case for the similar assessments for all four local authority districts, as stated earlier the occupancy rate reflects buildings rather than site areas.

Table 51 – Halton - Assessment of Existing Employment Areas

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Runcorn						
Ashville Industrial Estate, Clifton Road, Runcorn	13.97	E3 Employment Area	Small mixed office and industrial estate, with most recent development being B1 office	74	B/C	3.28 ha of open space to the rear of the estate could provide future development site
Astmoor Industrial Estate, Runcorn	78.55	E3 Employment Area	Large new town employment area, comprising a mix of large solus and terraced industrial properties. Accommodates mix of B1, B2, B8 uses	75	B/C	Mersey Gateway Bridge construction will see acquisitions and demolitions in central part of the Estate that will take 5.36 ha. This provides a remodelling opportunity following completion (The Mersey Gateway Regeneration Strategy has detailed regeneration proposals for Astmoor). Potential for further regeneration associated with underutilised, vacant, poor quality sites and premises. These represent around 15 percent of the Estate's area.
Daresbury Park, Runcorn	58.70	S20/S24, E3 Primary Employment Area Regional Investment Site	High quality office park with mix of bespoke and speculative offices. HQ buildings and office village, plus hotel.	97	A	Significant further land to continue development as high quality office provision. This comprises Employment sites 240/0; 240/7; 241/0/2/3. Includes consent for limited retail to support the park's occupiers. Potential to link with Daresbury SIC.

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Daresbury Science and Innovation Campus, Runcorn	31.41	S20/S24, E3/E6 Regional Investment Site	Specialist Science Park comprises offices, laboratories – some new build	82	B	Substantial land remaining for further expansion (Employment Sites 225/1, 246/0, 247/0 and 250/0). Potential to link with Daresbury Park
Halton Lea, Runcorn	12.35	E3 Employment Area	Number of office and community buildings grouped around the main shopping area	89	C/D	Redevelopment potential associated with two vacant 1970s office blocks. Could deliver mix of commercial and B1 office uses on sites of 1.14. An additional site of 2.43 ha has outline permission for retail. This is therefore not an employment regeneration opportunity.
Halton Road, Runcorn	8.33	E3 Employment Area	Small industrial area, with mix of B1/B2/B8 activity. Some recent refurbishment. Vacant plot.	93	C/D	Development plot of 0.56 ha
Heath Road North, Runcorn	3.95	E3 Employment Area	Canal side, poor quality industrial buildings; car dealership and office premises	100	C/D	Poor quality canal side buildings present long term redevelopment opportunity to include leisure/residential uses.
Manor Park, Runcorn	143.92	E3 Employment Area	Large New Town employment area accommodating B1, B2 and B8 uses, developed incrementally since 1970s	82	B	Limited remaining development land, only Employment site 236/1-1.11 ha. Scope to use expansion areas of existing buildings at Tudor Road (2.52 ha). Potential to extend Manor Park (further 7.92 ha) but requires resolution of drainage and environmental constraints

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Picow Farm Road, Runcorn	13.69	E3 Employment Area	Mix of trade counters and industrial premises. Mix of old and new properties	81	B/C	Includes three Employment Sites – 382/0; 398/0; 399/0, totalling 2.82 ha.
Runcorn Docks, Runcorn	44.31	S1, RG4 Regeneration Action Area	Port related uses, with part of the site for Halton College and residential.	80	B/C	Southern part of the site to be retained and remodelled for B1/B2 uses. Port functions to be relocated and residential development to occur on northern half of the site linked to Mid-Mersey Growth Point Bid.
The Heath Business Park, Runcorn	20.83	E3 Employment Area	Former ICI HQ office blocks and laboratories now in multiple occupation	78	B	Consent granted for further 16,722 sqm, with first building under construction. Scope in long term for further remodelling of existing buildings through refurbishment or redevelopment.
Weston Docks, Runcorn	43.73	S1, RG4 Regeneration Action Area	Ineos chemical plant. Port related uses. Some cleared areas in temporary use for vehicle storage	100	B/C	Regeneration of docks proposed, to expand newly established feeder port (Employment Site 299/0)
Whitehouse Industrial Estate/Preston Brook, Runcorn	101.45	E3 Employment Area	Large new town employment area, developed with range of industrial terraced units and modern office park. Also includes two substantial occupiers – Guinness and B&Q warehousing and distribution facilities.	86	A	Development opportunities limited to two infill Employment Sites (8/1 and 251/0), totalling 3.87 ha. Potential for 2.17 ha expansion through use of green space land to rear of Tanners Farm.
Widnes						

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Derby Road/Moorfield Road, Widnes	36.27	E3 Employment Area	Two large manufacturing facilities; car showrooms; trade counters	100	C	Development site of 10.09 ha associated with part vacant Rockwood Additives site (SHLAA Site Ref 86) should be retained for employment use. Numerous old, poor quality buildings present long term redevelopment opportunities
Ditton Strategic Rail Park (3MG), Widnes	184.12	S20, E3 and E7 Primarily Employment Area Regional Investment Site	Primarily Intermodal rail based freight facility park now known as 3MG. Part used as container park. Boundaries include modern Speke Approach development and long established Ditton Industrial Estate and PDM Group plant.	97	B	Substantial potential for remodelling. Additional greenfield land available between Speke Approach and Speke Road which could serve as further expansion in the future. 3MG Employment Sites represent almost 50 percent of Halton's total available land supply. Redevelopment of former Tessengerlo site (between site 255/1 and 379/0) underway for a large chilled food distribution warehouse.
Everite Road Industrial Estate, Widnes	31.43	E3 Employment Area	Former industrial complex now in multiple occupation. Small industrial buildings and terraced properties	92	C	Long term potential to combine and increase site density of several currently occupied buildings. Includes two infill Employment Sites (339/0 and 406/0) totalling 0.45 ha
Halebank Industrial Estate, Widnes	67.82	S1, RG5 Regeneration Action Area	Large established industrial area with self contained B2/B8 use sites. Dominated by GE	98	C	Site of 1.64 ha available and potential for regeneration of 3.45 ha, currently poor quality buildings to southeast of Pickering Road. Includes

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
						Employment Site 34/3 – 0.77 ha.
Moor Lane, Widnes	33.51	S1, RG2 Regeneration Action Area	Mixed use area of low grade industrial, retail, residential and roadside uses	97	C/D	Victoria Road area is subject of a masterplan study. Includes poor quality sites that could be selectively redeveloped, should they become vacant
St Michael's Industrial Estate, Oldgate, Widnes	11.36	E3 Employment Area	Mix of small terraced industrial units and self-contained sites	84	C	Long term selective redevelopment opportunities associated with currently occupied properties on Ditton Road
West Bank, Widnes	59.92	S1, RG1 Regeneration Action Area	Large industrial area, predominantly B2/B8 uses in old buildings	85	C/D	Area will be impacted by Mersey Gateway Bridge construction. Following completion of the bridge there will be opportunity to remodel a number of areas within West Bank, totalling 18.69 ha
Widnes Waterfront, Widnes	139.61	S1, RG3 Regeneration Action Area, E3 Employment Area	Large regeneration area containing a range of employment uses including chemical operators	63	B	Revised Masterplan identifies regeneration opportunities of up to 32.8 ha. Regeneration proposals involve a mix of B1, B2, B8, leisure, open space and residential provision
Total	1139.23					

Source: BE Group 2009

N.B. Appendix 11 provides site identification plans for regeneration/remodelling opportunities

- 6.25 The assessment of employment areas, the majority of which closely align with Halton's Primarily Employment Areas, reveals that these areas total 1139.23 ha. Whilst Runcorn has the greater share of the number of sites, (62 percent), the land supply is split evenly between Widnes and Runcorn. In excess of 70 percent of Halton's employment areas that were assessed comprise the former New Town estates of Astmoor, Manor Park and Whitehouse plus the more recent developments at Daresbury Park and Daresbury Science and Innovation Campus. In Widnes the 3MG and Waterfront areas represent over 57 percent of its provision.
- 6.26 BE Group's assessment of Halton's available sites (see Table 85, Chapter 8) indicates that of the April 2008 land availability figure for Runcorn, 82.98 ha comprises sites within the established employment areas. This represents 7.3 percent of the total of Halton's employment areas. Just under half (40.32 ha) is at Daresbury Park. A further 54.94 ha is identified as representing regeneration opportunities. Just under 1 percent (5.36 ha) is programmed to be lost at Astmoor because of the planned Mersey Gateway Bridge.
- 6.27 In Widnes 20.9 percent of the established employment areas land is considered to be available. Almost 80 percent of this is represented by the 95.76 ha of land available at Ditton Strategic Rail Park (3MG). Another 92.87 ha is identified as regeneration opportunity sites.
- 6.28 The grading of the areas indicates that all should be retained for employment use. None receives a grade below C/D. Reflecting the more modern greenfield developments associated with its former new town status, Runcorn achieves a higher number of A, B and B/C grades than Widnes.
- 6.29 Occupancy levels are high, with 77 percent of Runcorn, and 89 percent of Widnes, areas exhibiting a rate in excess of 80 percent. Indeed across the borough only the Widnes Waterfront area which has seen sizeable recent developments, has a sub-70 percent occupancy rate.

Knowsley

- 6.30 Table 52 schedules the ten Employment Areas, one Strategic Employment Site and five Action Areas, identified in Knowsley. Table 52 is subdivided to identify Knowsley Industrial and Business Parks, Kings Business Park, Huyton and Prescott separately.

Table 52 – Knowsley – Assessment of Existing Employment Areas

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Chemical Industrial Site Depot Road, Knowsley Industrial Park	11.48	EC3/T5 Employment Area	Rail linked chemicals industry park in multiple occupation	100	C	Possible scope to expand to north but would require new land allocations
Knowsley Industrial Park North	260.65	EC3 Employment Area	Large employment area comprising full range of building sizes and age, includes large manufacturing and small business space	87	B/C	Number of infill development sites, with scope to combine some to enable more substantial remodelling opportunities. These comprise around 20 percent of the total industrial park area
Knowsley Industrial Park South	124.96	EC3 Employment Area	Large manufacturing facilities some now subdivided. New infill development of B1/B2/B8 space	87	B	Considerable scope for remodelling of southern half, fronting A580 through combining allocated Employment Sites (25, 103, 168, 12, 40) with regeneration opportunity site
Knowsley Business Park	122.25	EC3 Employment Area	Large business park comprising a mix of modern warehouses and manufacturing facilities	86	A	Number of infill development sites, but most are of less than 1 ha. Potential expansion would require incursion into Green Belt
Huyton Business Park	114.15	EC3 Employment Area	Large employment area with mix of B2/B8 uses, the majority self contained. Some new infill on redeveloped sites.	83	B	Includes nine allocated Employment Sites, each of less than 1 ha, totalling 5.09 ha and Roscoes Wood Site (7.90 ha). Remodelling opportunity site of 1.02 ha, west of Wilson Road. Remainder of Employment Site 184 (3.40 ha) to be de-allocated from employment use
North Huyton Action Area	N/A	H3, S4, S6 Action Area	Residential area with some commercial	N/A	N/A	Limited opportunity to introduce small workspace facilities as part of

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
			premises			redevelopment of vacant land and derelict retail parade
Albany Road/Oliver Lyme Road, Prescot	2.76	EC3 Employment Area	Industrial complex comprising vacant multi-storey mill plus old single storey buildings in use	67	C/D	Substantial immediate remodelling opportunity associated with vacant multi storey mill site – 1.91 ha
Kings Business Park, Prescot	20.78	EC4 Strategic Employment Site	Modern high quality office park	61	A	Further 8.02 ha (Employment Sites 118 and 182) provide future development opportunity, although over half this is heavily wooded area.
South Prescot Action Area	46.98	EC5 Action Area	Largely cleared and serviced sites. Two existing factories to be vacated and site sold	74	B	Includes Employment Site 175 (29.38 ha) – the two Prysmian factories
Stoney Lane, Prescot	6.83	EC3 Employment Area	Two large B2/B8 buildings	100	C/D	
Warrington Road, Prescot	1.32	EC3 Employment Area	Old industrial buildings and modern nursery units	89	C/D	
Jaguar/Land Rover Plant, Halewood	147.96	EC3 Employment Area	Large automotive plant and supplier park	100	A	Includes Employment Site 1 of 18.44 ha, but held by Jaguar/Land Rover for own future use
Lower Road, Halewood	14.16	EC3 Employment Area	Solus chemical processing site	100	B/C	
Ravenscourt District Centre, Halewood	2.90	H3, S4, S6 Action Area	Small district retail and service centre, with vacant land	N/A	N/A	Potential to deliver B1 offices on two sites, south and east of the centre (total 0.36 ha).
Kirkby Town Centre	19.30	H3, S4, S6	Existing town centre	N/A	N/A	

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Action Area		Action Area				
Tower Hill, Kirkby	N/A	H3, S4, S6 Action Area	Residential area with grouping of community and retail uses	N/A	N/A	Scope for starter space/managed workspace on underused land adjacent to community and retail uses
Total	896.48					

Source: BE Group 2009

N.B. Appendix 12 provides site identification plans for regeneration/remodelling opportunities

- 6.31 In total Knowsley has 896.48 ha of existing employment areas, with just under 45 percent (397.09 ha) located at Knowsley Industrial Park. Huyton and Knowsley Business Parks (114.15 and 122.25 ha respectively) and the Jaguar/Land Rover Halewood site (147.96) contribute most of the remainder.
- 6.32 One-eighth of the total employment areas provision (122.17 ha) is assessed as remaining as undeveloped land. Just over a further four percent is identified as representing regeneration opportunity sites – the bulk of this is split between Knowsley Industrial Park and South Prescott Action Area. As a result, almost one quarter of Knowsley Industrial Park is represented by undeveloped sites or regeneration opportunities. Only 3.40 ha, the residue of Employment Site 184, at Huyton Business Park, is considered as being no longer appropriate for employment use.
- 6.33 For those areas where gradings are applicable (the nature of most of the Action Areas means they are not graded), all sites achieve at least C/D ratings, and should therefore be retained. Three, Kings Business Park, Knowsley Business Park and the Jaguar/Land Rover site are considered to be Grade A. Although 75 percent of the graded sites have occupancy levels above 80 percent, the Grade A Kings Business Park exhibits the lowest rate in the borough, at only 61 percent.

Sefton

- 6.34 Table 53 details the assessment of 19 Employment Areas and 3 Employment Opportunity Sites in Sefton. Only seven of these are located in North Sefton – six in Southport and one in Formby.

Table 53 – Sefton – Assessment of Existing Employment Areas

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Crossens Way, Southport	12.46	EDT5 Employment Area	Small employment area comprising Railex premises; sewage works; vacant site	92	C	Site represents scarce opportunity for B1/B8 uses in Southport
Former Philips Factory, Balmoral Drive, Southport	5.98	EDT5 Employment Area	Former Philips factory subdivided into mix of industrial and office units	28	C/D	Despite poor building condition site represents scarce opportunity in Southport for reasonable sized employment area
Formby Business Park, Altcar Road, Formby	13.44	EDT5 Employment Area	Mix of industrial retail and quasi-retail units	100	C	Consider more protection of B1/B8 uses rather than further A1 retail
Blowick Industrial Estate, Southport	28.49	EDT5 Employment Area	Old industrial estate with mix of trade counters and small industrial units. North Sefton's largest employment area	83	C/D	Several opportunities to remodel old premises, totalling 8.70 ha. Includes Employment Site SL102 (1.40 ha), which requires remediation
Slaidburn Crescent, Southport	6.61	EDT5 Employment Area	Small estate of retail/counter use and small industrial units	92	C/D	Serves as local employment area in Southport. Important to resist further retail activity
Southport Business Park, Town Lane, Southport	20.28	EDT4 Employment Area	Modern business park, predominantly B1 office uses	100	B	Endorse proposals to introduce main car dealerships on Town Lane frontage and to re-allocate 4.51 ha SE quadrant from residential to business park use to facilitate extension
Kensington Industrial Estate, Southport	1.35	EDT5 Employment Area	Small light industrial and trade counters estate	100	D	Self contained industrial estate, no room to expand
Birkdale Trading Estate, Liverpool Road,	0.75	EDT5 Employment Area	Starter units for light industrial and trade	100	D	Self contained industrial estate, providing valuable business

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Birkdale			counter uses			incubation space
Heysham Road Industrial Estate, Bootle	57.41	EDT5 Employment Area	Large industrial estate with mix of B2/B8 premises	85	B	Includes 3 allocated Employment Sites totalling 14.85 ha. Combination of vacant/derelict sites and buildings at Leckwith Road gives scope for largescale regeneration 8.19 ha
Sefton Lane Industrial Estate, Maghull	13.20	EDT5 Employment Area	Low quality, old industrial estate dominated by B8 uses/builder merchants, coach depot	98	D	Potential to remodel southern part of estate, currently underutilised (3.14 ha). Estate could be expanded by development onto adjacent Employment Site ML104_1
Aintree Racecourse Retail & Business Park, Aintree	10.80	EDT5 Employment Area	Modern estate comprising cash & carry warehouse and range of B1 industrial units	85	B/C	Need for restraint for further retail uses, in order to maintain industrial estate function
Land South of Aintree Curve, Netherton	6.47	EDT17.1/H6.1 Employment Opportunity Site	Vacant site bounded by live and redundant railway lines, adjacent to housing areas	N/A	N/A	Consider de-allocation from employment use, due to access and adjacent activity issues, and consider as a future housing site
Orrell Mount/Kingfisher Business Park, Hawthorne Road, Bootle	8.27	EDT5 Employment Area	Industrial estate, part recently developed	97	C	Established successful industrial estate
Maritime Enterprise Park, Rimrose Road, Bootle	10.86	EDT5 Employment Area	Low quality former port related industrial estate with B1/B2/B8 uses	94	D	Scope for selective employment redevelopment over much of the site to complement the more modern small industrial units within the site
Land & Premises,	5.30	EDT7.2	Collection of small sites	71	E	Potential for wholesale

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Acorn Way, Bootle		Employment Area	and premises, poor quality and underused			redevelopment to deliver new B1/B8 space
Linacre Lane Gas Works, Bootle	4.85	EDT17.2/H6.2 Employment Opportunity Site	Gas storage facility	0	D	Incorporates Employment Site BL313 (1.33 ha), which needs remediation. Gas storage facility likely to be retained to meet local needs.
South Sefton Business Centre, Canal Street, Bootle	17.50	EDT5 Employment Area	Mix of moderate quality industrial and office buildings adjacent to town centre	75	C	Important town centre related office and industrial employment area
Deltic Way Industrial Estate, Bootle	18.18	EDT5 Employment Area	Modern B1 industrial units and Vesty Business Park Offices	44	B	Established employment area that has successfully delivered new speculative buildings
Bridle Way Industrial Estate, Bootle	73.03	EDT5 Employment Area	Large employment area with mix of B1, B2, B8 uses, some major occupiers	91	A	Includes a number of allocated sites. Scope for extension to Atlantic Park. Potential to remodel some old industrial premises on Bridle Way
Premises off Park Lane West, Bootle	9.63	EDT5 Employment Area	Small old industrial estate containing low grade properties	100	C/D	Potential for remodelling of underused warehouse properties
The Peoples Site, Hawthorne Road, Bootle	10.97	EDT17.3/H6.5 Employment Opportunity Site	Employment area of low density warehouses and large vacant factory	94	E	Consider de-allocation as employment opportunity site, as it is proposed within next Phase of HMRI programme for housing, with possible retention of only small part for employment uses.
Port Industrial Area, Bootle	9.56	EDT9 Employment Area	Low grade employment area, including hotel and cafes, within Port Policy	96	D	Potential for selective redevelopment of poor quality large buildings in southern half of area

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
			Area			(3.63 ha). Opportunity to combine with any regeneration proposals with Liverpool City as abuts borough boundary.
Total	345.39					

Source: BE Group 2009

N.B. Appendix 13 provides site identification plants for regeneration/remodelling opportunities

- 6.35 The assessment indicates the total land provision within these areas to be 345.39 ha. Of this total only 25.9 percent (89.36 ha) is in North Sefton. Sites in Bootle dominate the provision, comprising 225.56 ha (65 percent of the total).
- 6.36 North Sefton has 22 percent of its provision in the form of sites remaining available at April 2008. However 13.17 ha of the 17.08 ha are located at Southport Business Park, where development is restricted to B1 office use. This demonstrates the chronic shortage of available industrial or warehousing land in Southport, and strengthens the argument for promoting the considered regeneration opportunities to bring forward industrial land at The Former Philips Factory and Blowick Industrial Estate. Mayflower Industrial Estate, Formby is not considered as one of Sefton's main Employment Areas, however, this small site should be retained given the shortage of employment land in North Sefton.
- 6.37 South Sefton also has a 22 percent share of its provision represented by remaining available sites. Almost half, 27.69 ha is located at Bridle Way, Bootle. Heysham Road, Bootle contributes another quarter. Regeneration Opportunity Sites are assessed as representing a further 33.56 ha.
- 6.38 Two sites, land south of Aintree Curve and The People's Site, are deemed appropriate for de-allocation from employment use. Both are considered to be more suited for housing development.
- 6.39 The area gradings reflect that by and large the borough has less accessible sites than the other local authority districts. Sites in the Dunningbridge Road Corridor, close to Switch Island (M57/M58/A59 interchange), and within the new Regional Investment Site location, attract Grades A and B, as does Southport Business Park (B Grade). Two Bootle sites (Acorn Way and The Peoples Site) are assessed as only Grade E.
- 6.40 As with the other districts, the Sefton assessments reveal high levels of occupancy – confirmation of commentary elsewhere in the report that Sefton's market is not in equilibrium, with too little vacant available space by comparison with its total stock. 77 percent of the areas assessment have occupancy levels in excess of 80 percent. The Linacre Lane Gasworks site is the only completely vacant area.

West Lancashire

- 6.41 Table 54 comprises the assessments for West Lancashire's 33 identified areas. Five

of these are designated Rural Employment Areas; two are Development Opportunity Sites (in Burscough and Appley Bridge), and the rest are Employment Areas.

Table 54 – West Lancashire – Assessment of Existing Employment Areas

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Co-op Bank Offices, Northway, Skelmersdale	2.60	DE 5.2.21 Employment Area	Solus site with two multi storey office blocks. One in multiple occupancy	89	C	Town centre related offices site. Future to be re-appraised in conjunction with the redevelopment proposals for Skelmersdale Town Centre.
Gillibrands Industrial Estate, Skelmersdale	100.26	DE 5.2.3 Employment Area	Substantial new town developed employment area for mix of B1/B2/B8 uses.	95	B	Potential to link Gillibrands West allocated sites (DE 5.1.15/16), totalling 3.0 ha, with poor quality intervening site vacant and in receivership, plus car park (2.38 ha) to remodel part of the estate. Potential to remodel small units at Gladden Place, including access arrangements – 1.19 ha.
Pimbo Industrial Estate Skelmersdale	154.89	DE 5.2.1 Employment Area	Substantial new town employment area, dominated by large occupiers - mainly warehousing/logistics	88	B	Two remaining allocated Employment Sites totalling 4.21 ha (DE 5.1.2/5). Number of opportunities to remodel existing sites or underutilised land, totalling 14.63 ha. These include an area of landscaping adjacent to M58 junction; a garden centre off Pimbo Road; two vacant properties off Pit Hey Place and two greenfield sites on the edge of the estate.
Stanley Industrial Estate, Skelmersdale	57.97	DE 5.2.2 Employment Area	Large new town employment area with mix of large and small premises, mostly B2/B8 uses	90	B/C	One allocated Employment Site (DE 5.1.7) remains available. Limited scope for remodelling unless Skelmersdale United FC relocate their ground.

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
TPT Centre, Railway Road, Skelmersdale	1.61	DE 5.2.15 Employment Area	Derelict industrial site in residential area	0	E	Requires demolition and redevelopment. Not an appropriate future employment site
Westgate Employment Area, Skelmersdale	4.93	DE 5.2.8 Employment Area	Small mixed office/ industrial area	100	C	
Whitemoss Business Park, Skelmersdale	14.21	DE 5.2.14 Employment Area	Modern high quality out of town business park, mostly B1 offices	75	A	Further development opportunities associated with Employment Site DE 5.1.17, to provide office space
XL Business Park, Stanley Industrial Estate Extension, Skelmersdale	36.47	DE 5.1.4 Employment Area	Modern development of warehouse and distribution depots for major companies	100	B	Further development opportunities for large B8 uses linked to Employment Sites DE5.1.14 b/c. Potential for small freehold plots for owner occupiers for DE 5.1.14a.
Abbey Lane, Burscough	6.42	DE 5.2.16 Employment Area	Small employment area focussed on low grade/untidy uses	100	D	Potential to intensify use at NE boundary (0.82 ha). Potential to expand to include remediated A59 frontage site (2.73 ha) with B1/B2/B8.
Briars Lane, Burscough	2.81	DE 5.2.20 Employment Area	Small industrial complex, dominated by WCF Distribution Services	100	C/D	
Burscough Employment Area, Burscough	48.17	DE 5.2.7 Employment Area	Comprises two distinct large industrial estates in multiple occupation	91	B/C	Potential to remodel 0.21 ha west of Tollgate Road (poor quality, part empty nissen huts site). Consider possible allocation of intervening disused airfield west of Tollgate Road/south of Ringtail Road to combine the two existing

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
						estates. Includes three sites that form part of April 2008 notionally available land supply but DE 5.1.21 developed as Merlin Park and DE5.1.20 now largely built out. Potential to expand southwards to include 4.36 ha at junction of Tollgate Road and Pippin Street (Replacement Local Plan Policy DE 15).
Burscough Wharf, Liverpool Road North, Burscough	0.17	DE 14.8 Development Opportunity Site	Vacant historic canalside warehouses. Listed buildings	0	C/D	Character and location of buildings presents opportunity for mixed-use (retail and/or offices) linked to town centre.
Digmoor Road, Skelmersdale	0.95	DE 5.2.23 Employment Area	Solus derelict industrial site	0	D/E	Location more appropriate for non-employment uses, compatible with adjacent housing areas.
Orrell Lane, Burscough	2.53	DE 5.2.12 Employment Area	Solus industrial site occupied by UBH international	100	C	
Platts Lane, Burscough	0.50	DE 5.2.10 Employment Area	Small trade counters estate in mainly residential area	100	C/D	
Red Cat Lane, Burscough	4.64	DE 5.2.111 Employment Area	Edge of town centre industrial area dominated by TRM Packaging	100	C	
Hattersley Court, Burscough Street, Ormskirk	3.32	Employment Area	New office park on edge of town centre	0	B/C	

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Ormskirk Employment Area, Ormskirk	3.30	DE 5.2.9 Employment Area	Linear, mixed B1/B2/B8 edge of town centre employment area. Mix of terraced and solus buildings	100	C	
Southport Road/Green Lane, Ormskirk	0.74	DE 5.2.22 Employment Area	Mixed office, industrial trade counter uses in converted historic buildings. Now known as Malt House Business Park	75	C/D	
Ainscough Building Supplies, Mossy Lea Road, Wrightington	1.56	DE 5.66 Rural Employment Area	Trade counters	100	C/D	
Alty's Brickworks Hesketh Bank	4.02	DE 5.2.19 Employment Area	Builders merchants and storage	100	C	
Appley Lane North (Ruberoid Works), Appley Bridge	3.78	DE 5.2.17 Employment Area	Solus B2 use site	100	D	
Dawber Delph, Appley Bridge	4.35	DE 5.2.6 Employment Area	Industrial estate in multiple occupation with vacant land	100	C/D	Opportunity to develop 1.51 ha of vacant land accessed by unpaved road.
East Quarry, Appley Bridge	12.71	DE 14.5 Development Opportunity Site	Flooded former quarry with industrial units terrace to road frontage (Northern Diver Business Park)	56	D	Limited scope for further employment use because of flooded quarry. Possible mixed use scheme capitalising on water feature, could include B1 use.
Greaves Hall Business Park, Banks	5.43	DE 5.5 Rural Employment Area	Former hospital buildings in use for low grade industrial activity	100	D	Potential to regenerate existing occupied and derelict buildings to create rural workspace (B1 use)

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
						capitalising on setting.
North Quarry, Appley Bridge	5.12	DE 5.2.5 Employment Area	Mixed industrial and office development (the latter new)	43	C	Remaining development site of 0.18 ha within Employment Site DE 5.1.23.
Pilkington R&D Laboratories Hall Lane, Lathom	8.33	DE 5.7 Employment Area	R&D facilities for Pilkington	100	B/C	Scope to intensify development through use of two vacant areas totalling 2.20 ha
Ravenhead Brickworks, Up Holland	7.79	DE 5.2.19 Employment Area	Large solus industrial site adjacent to former quarry.	100	D	
Reynolds Garage, Southport Road, Scarisbirck	1.83	DE 5.6d Rural Employment Area	Part development with housing. Part cleared.	N/A	N/A	Potential for 0.82 ha as rural employment site
School Lane, Haskayne	1.48	DE 5.6a Rural Employment Site	Derelict industrial site in village centre	0	D/E	Not an appropriate site for future employment use
Sharrock's Depot, Mossy Lea Road, Wrightington	0.85	DE 5.6c Rural Employment Area	Solus site used for wholesalers/retail and ancillary storage	100	C/D	
Simonswood Industrial Park, Simonswood	57.41	DE 5.2.4 Employment Area	Substantial industrial area, much used for open storage	82	D	Considerable scope to remodel areas of the industrial park, plus development of Employment Site DE 5.1.24. Potential to extend northwards to include 20.26 ha fronting Stopgate Lane.
Tarleton Mill, Plox Brow Tarleton	4.93	DE 5.2.13 Employment Area	Number of small, low grade industrial uses plus large vacant mill building	83	D	Potential for refurbishment/selective demolitions of the mill complex to create SME accommodation

Site	Site Area, ha	LA Policy Ref	Current Use	Occupancy Rate, percent	Grade Assessment	Comments
Total	566.08					

Source: BE Group 2009

N.B. Appendix 14 provides site identification plans for regeneration/remodelling opportunities

- 6.42 Table 54 indicates that the district has 566.08 ha within these 33 areas. It should be noted this total excludes the Cobbs Clough and Town Centre allocations of a further 14.82 ha in Skelmersdale. Reflecting the former new town status of Skelmersdale, the latter has over two thirds of the existing provision (373.89 ha) – but well under a third of the sites total. Seven sites in Burscough (totalling 64.24 ha) and Simonswood Industrial Estate (57.41 ha) provide the only other significant concentrations of provision.
- 6.43 The assessments indicate that only eight percent (46.22 ha) of the identified areas' land supply remains available. The largest share of this is within Skelmersdale, with XL Business Park alone contributing 19.23 ha. A further nine percent (51.91 ha) is identified as comprising regeneration opportunity sites. Pimbo (Skelmersdale) and Simonswood each have almost 15 ha of such sites.
- 6.44 Just over 1 percent of the total provision is assessed as no longer appropriate for employment uses. This is made up of four sites – two in Skelmersdale, one each in Haskayne and Scarisbrick.
- 6.45 There is clear demarcation between the grading of Skelmersdale's sites and those in the rest of the district. Skelmersdale's new town development of modern, greenfield sites, mostly allied to M58 motorway junctions is reflected in the higher assessments. The more rural site locations see much lower assessment, a reflection of a mix of poor critical mass, lack of accessibility and prominence.
- 6.46 Three sites, two in Skelmersdale and one in Haskayne receive D/E or E gradings. All are assessed as no longer appropriate for employment uses.
- 6.47 Occupancy levels are again generally high. Outside the key settlements of Skelmersdale, Burscough and Ormskirk occupancy experience is polarised. Eight of the 13 sites have full occupancy. Three have between 0 and 56 percent levels.
- 6.48 Six of Burscough's seven sites have occupancy levels in excess of 90 percent. The picture is more mixed in Ormskirk with levels ranging from 0 to 100 percent. Two thirds of Skelmersdale's sites have occupation above 80 percent. The sites proposed for de-allocation are all vacant.

Summary

- 6.49 Table 55 summarises the assessments for the four local authority areas. Overall 15 percent of the study area's established employment land provision remains available. Another 10 percent has been assessed as appropriate for regeneration/remodelling. Just over one percent is viewed for de-allocation, with the majority in Halton being required for the Mersey Gateway Bridge. Further commentary is provided in Section 8.0 – Employment Land.

Table 55 – Summary of Employment Areas Assessments

	Number of Areas	Total Size, ha	Sites Remaining, ha	Regeneration Opportunities, ha	De-allocations, ha
Halton	21	1139.23	200.91	147.81	17.38*
Knowsley	16	896.48	122.17	36.79	3.40
Sefton	22	345.39	74.55	53.13	6.47
West Lancashire	33	566.08	46.22	51.91	5.87
Total	92	2947.18	443.85	289.64	33.12

Source: BE Group 2009

* Land to be lost to the Mersey Gateway Bridge

Halton's Strategic Regional Sites

- 6.50 Commentary is provided on the future of Halton's two Strategic Regional Sites – Ditton Strategic Rail Freight Park; Daresbury Park and Daresbury Science and Innovation Campus. Both are seen by the NWDA to be continuing in this function following the 2009 review of the North West's Strategic Regional Sites.
- 6.51 Ditton, now known as 3MG, is recognised in the RSS as a key intermodal freight facility. Reference is made to this elsewhere in the report. Its importance to Halton is not only in the function it delivers, but also because the land available within 3MG represents almost half the borough's available land supply (at April 2008).
- 6.52 Until such time as the Parkside proposal comes to fruition, 3MG represents a rare largescale rail related freight interchange in the Liverpool City Region.
- 6.53 Both the Employment Areas at Daresbury (Daresbury Park and the Science and Innovation Campus) experience high occupancy levels for their built floorspace. To date these two developments have been separately owned, and are of different origins and functions. The former is a commercially developed office park with the

initial emphasis on large floorplate headquarters buildings now complemented with smaller self contained units. In contrast, Daresbury SIC has emerged from public policy and investment which has sought to exploit and expand the high technology research and development functions long established on the site.

6.54 These two employment centres, together with the intervening greenfield areas, have been incorporated into the recently (2008) produced Daresbury Framework. The Framework provides a vision for the future growth and expansion of the Daresbury Area over a period equivalent to the LDF timescale.

6.55 The physical framework embraces seven major components. These are set out in Table 56.

Table 56 – Daresbury Framework – Physical Components

Component	Vision
Daresbury Science and Innovation Campus	Improvements in infrastructure demonstrated through increased profile in respect of existing road and rail networks. Improved linkages with existing business/community uses and open spaces in and around the campus.
Daresbury 'Heart'	Mixed-use focal point at the centre of the framework area
Daresbury Park	Building from existing facilities around J11 of the M56, the business park will expand north to integrate better with other uses in Daresbury SIC
Residential Development Areas	A key enabling development, pump priming the initial infrastructure, and supporting amenity and interaction within the 'Heart'
A New Transport Hub	Will include a bus interchange, park and ride facility, and potential new railway station.
Open Amenity Space	Land south west of Delph Lane is to be protected for local amenity and the extension of habitat.
Green Open Space	Protection and enhancement of existing greenspace.

Source: Gifford/WT Partnership/DTZ/Taylor Young, 2008

6.56 The Framework envisages a very significant increase in floorspace at both employment centres, together with over 32,500 sqm of mixed use space and approximately 1250 residential units. Delivery will be private sector led.

Daresbury Park

6.57 The first phases of Daresbury Park are now complete. Evidence suggests that once recovery from the present recession is underway, private sector led development will continue. Land exists for a further 10-20 years of development.

- 6.58 The success of this office park in attracting major occupiers is in part due to the high environmental quality of developments, and this standard needs to be maintained in future phases. Its success also rests on the delivery of a range of office types and sizes. Future developments should avoid the delivery of too many small, 279-464 sqm stand alone office buildings (such as those recently developed at Cinnabar Court). Evidence suggests there is an oversupply of such units across Merseyside.
- 6.59 Daresbury Park Masterplan calls for the provision of retail and leisure (beyond the hotel) as part of the scheme. At present the critical mass of the Office Park is too small to support such facilities, but as it develops the provision of support services will be key to its continuing attractiveness to occupiers. The public sector must be willing to support the provision of mixed use elements, when the private sector feels able to deliver them.
- 6.60 Daresbury Park also lacks the critical mass to support serviced office schemes or incubator units. However, the provision of these, at a later date, would greatly add to the mix of space available. Again such developments should be supported if they emerge as a private sector proposal.

Daresbury Science and Innovation Campus

- 6.61 As with Daresbury Park, the high environmental quality of Daresbury SIC's site has been key to attracting occupiers, and this standard needs to be maintained in future developments. There is also some pressure to release land for general office uses. For example, Daresbury Properties have an aspiration to develop general office units on site 247/0 (Land East of Daresbury Lab). This should be resisted, to ensure that general offices remain focused at Daresbury Park, and aid the development of a critical mass of high technology/science based companies at the SIC.
- 6.62 Taking advantage of all available land (particularly Employment Site 246/0 Land West of Daresbury Lab), will require improved linkages across the Bridgewater Canal. A new bridge may require some public sector support and assistance to deliver, and will need to engage with Peel, the owner and operator of the Canal.
- 6.63 Within the original laboratory, most buildings remain in active use. However, the high technology uses are likely to have a limited lifespan, and redevelopment/refurbishment should be permitted if it is seen as necessary to allow facilities to remain up to date.

Kings Business Park, Prescott

- 6.64 The study brief requests a review of the role of Kings Business Park, including an appraisal of the perceived limited capacity remaining, and the potential need for a successor site elsewhere in Knowsley.
- 6.65 Although one of the North West's original grouping of Strategic Regional Sites, from the recently completed review the NWDA has decided to delete Kings Business Park from the future listing. Kings Business Park is a private sector led development. Since 2006 it has been owned by Yorkshire based developer Marshall. Marshall own a number of key office park developments in the North West, including Daresbury Park; Olympic Park and part of Centre Park (Warrington).
- 6.66 Since purchasing the site (which already had two large occupiers, Vertex and CSC), Marshall have commenced building of some of the 32,516 sqm of office space granted under the original outline planning permission. Two schemes (Puma Court and Tiger Court) have been completed providing 19 units although both schemes have been slow to let in the present market. A further bespoke office is under construction for Alternative Group.
- 6.67 Future development will largely be based on pre-let deals and sales. Although further speculative development may be considered depending on demand. Significantly Marshall is also of the belief that the largest remaining allocated area (Employment Site 182) cannot be developed due to TPO's on the site.
- 6.68 In the short to medium term Kings Business Park will not support additional speculative development. This is due the high vacancy rates in existing space, the existence of competing schemes at Prescott Business Park and Knowsley Business Park (as well as other prestige sites elsewhere in Merseyside and Warrington), general market conditions, and the unwillingness of the developer to take further risks.
- 6.69 Demand exists for design and build schemes from larger firms, providing the opportunity to develop much of the remaining land as a centre for headquarter offices. Such facilities, on a good quality, well accessed site, would be attractive to large companies with processing/warehousing facilities at Knowsley Industrial Park and elsewhere in Merseyside.

- 6.70 The remaining land on Site 182 is unlikely to come forward for development, but should be retained as a greenspace buffer between Kings Business Park and the M57. Knowsley MBC should negotiate with Marshall to secure this land for conservation and landscaping uses, as well as the provision of developer contributions for its upkeep.
- 6.71 Hazels House (Site 118) remains an opportunity for a high quality office refurbishment. However, if a purely office development cannot be delivered on this site then a mixed use scheme, including small retail and leisure elements, might be preferable. In addition to increasing development values (and thus encouraging the scheme to be brought forward more quickly), this would provide Kings Business Park with services it presently lacks, increasing its attractiveness to occupiers, and therefore more competitive with peer developments that include such facilities on-site.
- 6.72 In the longer term the remaining development capacity for Kings Business Park is limited, particularly should Employment Site 182 not be brought forward. During the LDF period it is probable that there will be a need to allocate another site to deliver high quality offices comparable to the intentions of Kings Business Park. In part this will be a response to the continuing sectoral shift towards office based employment.
- 6.73 In Section 8, Call for Sites submissions are reviewed. Reference is made to CFS submission KO364, Knowsley Lane Farm. This relates to 19 ha north of Kings Business Park, adjacent to the M57 and Junction 4. This is seen as an appropriate successor opportunity, which would capitalise on the location's acceptability (generated by Kings Business Park) and help to achieve critical mass in the area. This could also contribute to Knowsley's attractiveness by introducing healthy developer competition.

Bootle and Southport Central Areas

- 6.74 The study has also reviewed, at the request of Sefton Metropolitan Borough Council, existing office stock in the key Sefton Central Areas (town centres) of Bootle and Southport, as well as the Bootle Office Quarter. GIS maps of the boundaries of these three areas are provided at Appendix 15.

Bootle Office Quarter

- 6.75 The south east section of Bootle Central Area is defined in the Sefton UDP as the

Bootle Office Quarter. The following observations are made:

- The Bootle Office Quarter contains 51,145 sqm of office floorspace (in 16 properties). This equates to 13.4 percent of Sefton's total office stock (382,000 sqm). It is also the administrative centre for Sefton
- The average property size is 3197 sqm. This reflects the presence of five buildings of more than 2000 sqm in size within the Office Quarter boundary. By far the largest is Redgrave Court, Merton Road. This building alone contains 25,837 sqm of office space (half the total)
- Despite this, the majority of office buildings are less than 350 sqm in size, primarily on Merton Road. These provide space for financial services companies
- 11 percent of the floorspace (5588 sqm) is presently vacant and on the market. All of this is at Daniel House, Stanley Road/Trinity Road
- The majority of the larger office properties were built during the 1960s to 1980s, although several have undergone substantial refurbishment. St Annes House, Balliol Road is currently being refurbished
- Much of the stock can be said to be of average or good quality, although the age of properties may mean they lack some modern facilities (such as high speed broadband connections)
- The Quarter is dominated by public sector occupiers (notably Sefton MBC, HM Revenue and Customs and the NHS).

6.76 Faith in the location by private sector investors is reflected in the mix of new build and recent, and ongoing, refurbishment of the 1960s-1980s stock. This may be driven by the fact that the occupier market is dominated by large floorplates and public sector users.

6.77 The Office Quarter may be viewed as Sefton's Central Business District, albeit largely public sector orientated. It is seen as complementing Liverpool City Centre (benefits are lower cost space; higher levels of on-site parking, by comparison).

6.78 There is however limited provision for smaller space users, despite the fact small businesses represent the overwhelming percentage of the borough's business profile. Only by provision of suites through building subdivisions is there scope to accommodate small business/small space occupiers.

6.79 Only Employment Site BL170, land adjacent to John's House in temporary use as a

car park, provides the opportunity for further new development. This could deliver the smaller self-contained office product lacking at present. However the temporary car park is clearly serving a purpose, and this poses an issue of what happens when displacement occurs should the site be brought forward for development. Sefton MBC should consider replacement provision, if the site is developed. This could be achieved by a mixed car park and office development.

6.80 It is considered there is scope to redefine the Office Quarter's boundary by extending northwards as far as the Leeds Liverpool Canal. This is illustrated on the plan in Appendix 15. This area includes large former residential properties with gardens, converted to office use within a block bounded by Merton Grove, Washington Parade, Merton Road and Stanley Road. The proposed boundary adjustment also extends to the east of Stanley Road, to include the block comprising Sefton Magistrates Court.

6.81 It is important to protect the Office Quarter for continuing office based employment, but where appropriate, further support services (e.g. pub restaurant) for the office employees should be encouraged.

Bootle Central Area

6.82 The following observations are made about Bootle Central Area:

- Outside of the Office Quarter, Bootle Central Area contains 17,014 sqm of office floorspace (in 19 properties). This equates to 4.4 percent of Sefton's total office stock (382,000 sqm)
- The average property size is 895 sqm. This reflects the presence of Sefton Town Hall and Litherland House within the Central Area boundary. These two buildings are 4905 sqm and 3761 sqm respectively. Excluding them from the figures, reduces the average property size to 491 sqm
- The majority of offices are 200-400 sqm in size, primarily on Stanley Road
- 15 percent of the floorspace (2545 sqm) is presently vacant and on the market
- The office stock is of a mix of ages. Most of the larger properties were constructed during the 1960s to 1980s. Much of the smaller space on Stanley Road was built pre 1950
- Much of the older stock is of poor quality. Older properties can have architectural merit but they tend to reflect lower quality conversions from other uses such as retail (Stanley Road)

- There are a number of new office properties under development or undergoing substantial refurbishment.
- Most occupiers are in the local financial and legal services sectors.

6.83 Bootle Central Area includes the Office Quarter and Bootle's town centre retailing, which is focused on the substantial The Strand shopping centre.

6.84 The Central Area is a genuinely mixed use area. Because of its importance as an employment centre and generator of footfall and spend for the retailing, it is important Sefton Council protects the existing office sites and/or buildings that lie within the Central Area, but outside the Office Quarter. Much of this stock is old and, like The Strand centre, is in need of refurbishment or upgrading.

Southport Central Area

6.85 Southport Central Area contains 25,019 sqm of office floorspace (in 107 properties). This equates to 6.5 percent of Sefton's total office stock (382,000 sqm). Analysis shows:

- The average property size is 234 sqm
- The majority of offices are less than 200 sqm in size, with concentrations of space on Hoghton Street, and above shops on Lord Street
- 3 percent of the floorspace (776 sqm) is presently vacant and on the market
- Most of the office stock is old, with the majority built pre 1950
- Much of the older stock is of poor quality. Older properties can have architectural merit but they tend to reflect lower quality conversions from other uses such as residential (Hoghton Street) or retail
- There is little evidence of recent office development in the Central Area
- Most occupiers are in the local financial and legal services sectors.

6.86 Southport's Central Area office market contrasts with Bootle Office Quarter. The occupier market has a private, rather than public, sector emphasis. As a result it is dominated by small independent businesses.

6.87 The supply is largely a combination of converted residential properties on Hoghton Street, and offices above retail space on Lord Street. As a consequence there is extremely limited on-site parking provision with these premises. There is little evidence of modern space or recent investment, but this is against a background of a

substantial Conservation Area status and extensive 'resort' designation areas.

- 6.88 It is considered there may be selective conversion or redevelopment opportunities along Tulketh and Eastbank Streets, which currently include tertiary retail and low grade activity.
- 6.89 It is also considered there is need to protect the Central Area from further residential development if it threatens town centre employment opportunities. It is acknowledged the market will see greater demand and viability associated with residential development. In particular it is important to protect Hoghton Street from residential development, in order to provide offices, support services or expansion of Southport College.

Adjoining Areas

- 6.90 Three other local authorities fall within both Merseyside and Liverpool City Region. Each has completed, or is completing an employment land review.

Liverpool

- 6.91 The City of Liverpool Economic and Employment Development Study Stage 1 Report was published in May 2008. Stage 2, which addressed the future role and function of North Liverpool (and Atlantic Gateway SIA) was published in June 2008. The Study covers the period to 2021, rather than 2026.
- 6.92 At headline city-wide level the employment land demand, to 2021, is identified as 278 ha. This is calculated from a combination of the 'baseline' economic forecasts (and the notional land requirement generated from the associated level of employment) and the 'project scenario' ('policy on' factoring in the land implications of planned projects and the more aspirational view of economic development across the city). This is a significantly higher figure than the trend based forecast, using historic take-up data, which suggests a need for only 123 ha to 2021.
- 6.93 The 278 ha is seen as a minimum requirement given that it does not take into account, churn, choice or mixed use development in the future. Consequently, the study concludes the need to retain all the existing (at 2007) 330 ha supply to protect economic prospects over the LDF period to 2021.
- 6.94 Whilst the study concludes there is a very tight existing allocated and identified

employment land position across Liverpool within the period to 2021, it does not identify the need for additional allocations beyond those already in place.

- 6.95 The study refers to consultations with Sefton, Halton, Knowsley and West Lancashire, because there are clear spatial policy implications which cross borders, in terms of employment land supply. The findings of these consultations are summarised in Table 57.

Table 57 – Liverpool Employment Land Study – Local Authority Consultations’ Conclusions

Local Authority	Conclusions
Halton	Significant land supply (247 ha), with average take-up just under 20 ha/pa. No strong pressures from residential development. Supply significantly constrained by contamination on much of brownfield land.
Knowsley	Relatively good land supply but pressures exist which may affect development viability. Strong demand impacting on supply of good quality sites; lack of large available sites; number of contaminated sites; private sector holding back sites.
Sefton	Most significant employment land relationship of all City Region authority areas. Important economic development links, with travel to work patterns and shared SIA areas. In view of Sefton’s tight supply, Liverpool’s decisions should reflect cross boundary relationship, with any de-allocations likely to create pressure on Sefton to release Green Belt.
West Lancashire	Shortage of land arising from Planning Inspector’s decision to refuse Green Belt release at last Local Plan Review. Allocated supply seen as only enough for five years, and position to be exacerbated by relaxation of RSS housing restraint policy.

Source: Liverpool Economic & Employment Development Study 2008

- 6.96 It is noted that no further reference is made to the needs of adjoining districts, in the conclusions and recommendations. Nor does there appear to be any statement about Liverpool’s future contribution to RSS forecasts for future land supply in Merseyside and Halton.
- 6.97 Stage 2 analyses supply and demand across North Liverpool.
- 6.98 It identifies a requirement for at least 63 ha of land alongside a supply mismatch – undersupply of office appropriate/available land, and oversupply of general industrial land and premises, compared to forecast growth. And this ignores land need for ‘policy on’ projections.

6.99 Stage 2 concludes the need to ensure a supply of sites to diversify the local economy and contributing to the wider regeneration of North Liverpool, including South Sefton. In this respect, the Bankhall Employment Area is seen as an opportunity to cater for indigenous economic needs linked to the fortunes of Bootle and South Sefton as well as investment at the Port of Liverpool. However, significant constraints of some sites within Bankhall mean delivery is dependant on public sector intervention.

St Helens

6.100 Conclusions from the Employment Land Review (2006-2025) for St Helens identify the existing supply as 75 ha. This is split to the following uses – B1 (17 ha); B2 (48 ha); B8 (10 ha). Demand for land is considered to be 45 ha, made up of B1 (13 ha), B8 (47 ha) offset by negative demand for B2 (15 ha). St Helens acknowledge this latter figure makes no provision for occupiers who may need to relocate.

6.101 The focus of future demand is for B8. St Helens see Omega (Warrington) and Parkside as potentially helping to meet this need. And whilst some of this need could be met through the reuse of B2 sites that are not required in the future, should Omega and Parkside not proceed, then St Helens would have to look for a Green Belt release through future sub-regional work.

Wirral

6.102 Wirral's Employment Land and Premises Study is at draft final report stage. The study considers a number of different forecasting scenarios – historic land take-up; labour supply, industry sector changes; RSS assumptions and 'policy on' impacts – for employment land for the period 2010 to 2030.

6.103 The report recommends Wirral seeks to achieve a net gain of 65 ha i.e. any existing land allocations lost should be replaced. Potentially this could therefore require up to 150 ha over the period to 2030. This is set against the context of an 'available' supply of 222 ha (at April 2007), projected to be reduced to 191 ha at the LDF start date of 2010.

6.104 The study identifies that Wirral has a chronic shortage of readily available, developable land – equivalent to less than six months supply. No substantial sites are available. Also Wirral has only half of the RSS recommended 30 percent figure for employment land to be available for development within three years.

6.105 West Lancashire also abuts Wigan (Manchester City Region) and South Ribble (Central Lancashire City Region). Both have recently completed Employment Land Reviews, with South Ribble's being a combined study also covering Preston and Chorley.

Wigan

6.106 Wigan completed its employment land review in December 2007. The review concluded that Wigan Council should seek to ensure that between 290 and 335 ha of general employment land is provided for the period to 2026. With existing supply calculated at 171 ha this leaves a shortfall of 164 ha to be addressed. The review also states the need to have a rolling provision of five years worth of high quality, unconstrained land that is readily available for development at any one time.

6.107 Although the review refers to the increased numbers of residents out-commuting as the reason for the fall in unemployment numbers, Liverpool, Manchester, Warrington and St Helens are cited as the key destinations. No reference is made to linkages with either West Lancashire or Knowsley.

6.108 Whilst the review does not identify where the 164 ha shortfall in supply is to be met, reference is made to the opportunities associated with Safeguarded Land. It is evident that this is seen as only meeting Wigan's requirements. The linking of need and supply with neighbouring authorities such as West Lancashire is not mentioned.

Chorley, Preston, South Ribble

6.109 Chorley, Preston and South Ribble have jointly produced an Employment Land Review for the period to 2021. This was published in August 2008.

6.110 The Review comments on the labour market for the 'Central Lancashire Area' (the three local authorities), and notes it is characterised by relatively low levels of both incoming and outgoing commuter flows. No reference is made to linkages with West Lancashire.

6.111 The Review does not set specific targets in terms of future employment land provision. Rather, having acknowledged the contrasting results between modelling future change in the economy and historic trend take-up, the Review states the need to apply the former as an absolute minimum land requirement.

6.112 It observes that in reality a much larger land amount is required to ensure continuing economic development and an adequate portfolio of sites, particularly if past (gross) development rates are to continue into the future. Therefore over the entire period up to 2021 there is need to increase total (net) supply – and to undertake reviews every three years of quantity and quality to ensure ongoing availability.

7.0 COMPANY SURVEY

Introduction

- 7.1 A business survey has been carried out to establish evidence of demand for land and property, and substantiate findings in other sections of this study. It is another strand of evidence that will be used to inform the study's conclusions and recommendations.

Methodology

- 7.2 A questionnaire (included at Appendix 16), with explanatory covering letter and pre-paid envelope, was sent out to 952 companies. There are approximately 9512 businesses operating from B1, B2 and B8 premises or sites in the study area (according to 2006 VAT registrations data), and therefore this is a ten percent sample. The stock of companies varies between each of the local authority areas, therefore the number of companies surveyed in each of the areas is unequal.
- 7.3 The source and content of the company databases also differs between local authority areas. Whereas West Lancashire companies were sourced from the Focus business database, company listings for the other three areas were sourced from the individual local authorities. Although full databases (containing all known companies operating from B1, B2 and B8 premises) were provided for Knowsley and Sefton, Halton supplied a sample of 300 relevant companies.
- 7.4 There are also differences between the databases in terms of the information provided, for example company size is not given for all companies, and company activity categories differ between the local authority areas (and are not provided at all in Halton's listings). These differences will mean that although, where possible, the companies targeted were representative of the business profile by activity and size, this cannot be guaranteed. Therefore responses are not necessarily comparable between local authority areas.
- 7.5 In so far as was possible the targeting of companies reflects the geographic sub-areas identified by the individual local authorities in the brief. Whilst consolidated data analysis is presented in this chapter, more detailed information and raw data is included at Appendices 17 to 20 on a local authority by local authority basis. These Appendices include breakdowns of the geographic distribution of respondents, and analyses, where possible, to the sub-areas defined in Table 1.

Response

- 7.6 The postal response achieved was 12.1 percent. Building on this, follow-up telephone calls were made to elicit better co-operation from businesses.
- 7.7 These actions significantly enhanced the numbers of responses, as well as establishing those companies who have either ceased trading or are no longer in the study area.
- 7.8 Overall 533 questionnaires have been completed, 56.0 percent of the total originally targeted, see Table 58. This equates to just under a six percent sample of the study area relevant business population, but is considered a sufficiently robust level of response. It should be noted that the high number of Sefton companies identified as having ceased trading or moved reflects the outdated business database provided for this area. As a consequence all of the companies on the database, still in existence, were pursued to ensure a response was secured.

Table 58 – Company Survey Responses

Local Authority	Halton	Knowsley	Sefton	West Lancashire	Total
Responses received	95	79	223	136	533
No Response	63	13	0	51	127
Companies ceased/ moved	11	45	181	55	292
Total	169	137	404	242	952

Source: BE Group 2009

- 7.9 Appendices 17 to 20 show that the geographic distribution of the companies responding to the survey in each local authority area is relatively representative of the original sample used.

Company Size

- 7.10 The 533 companies taking part in this survey employ 6346 people. Of these, 6.7 percent (423) are part-time employees, as shown in Table 59. Knowsley has by far the fewest part time workers. They make up just two percent of its total. This is substantially below NOMIS' figure of 23 percent of the total workforce being in part-time employment. However NOMIS figure relates to all employment sectors, for example retail, hotel and catering, where there is a much higher incidence of part-time employment.

Table 59 – Number of Employees

Status	Halton	Knowsley	Sefton	West Lancashire	Total	Percentage
Full-time	1117	1546	2042	1218	5923	93.3
Part-time	118	30	188	87	423	6.7
Total	1235	1576	2230	1305	6346	100

Source: BE Group 2009

- 7.11 Table 60 shows that total responses broadly fit the national profile of small company employment. The majority (74.8 percent) employ ten or less (micro-businesses), the proportion of small firms (employing 11-50) is also quite large (19.4 percent). 25 companies employ more than 50 people. However, although Halton, Sefton and West Lancashire broadly fit this national profile, Knowsley has an unusually small proportion of companies with ten or less employees (just 60.8 percent), as well as a large proportion with over 50 employees (10.1 percent).
- 7.12 It should also be noted that there are three particularly large companies (with over 200 employees) that took part in the survey, (one each in Knowsley, Sefton and West Lancashire) as this may skew some of the survey findings.

Table 60 – Company Profile

Company Size, employees	Number of Companies Responding					Proportion of Companies Responding, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
0-2	18	23	96	71	208	39.0
3-5	24	15	42	22	103	19.3
6-10	20	10	39	19	88	16.5
11-20	14	13	27	13	67	12.6
21-50	11	8	9	8	36	6.8
50 +	5	8	9	3	25	4.7
Not stated	3	2	1	0	6	1.2
Total	95	79	223	136	533	100

Source: BE Group 2009

Current Premises

- 7.13 Companies were asked to state the type of property they occupy e.g. offices, industrial, warehouse, etc. Table 61 shows that just under half of the companies in the study area occupy industrial/warehouse accommodation, 27.0 percent are in

offices (51.2 percent if serviced offices and homeworkers are included). Just 2.1 percent operate from a site. Knowsley has the smallest proportion of companies that occupy office accommodation, just 12.7 percent. The proportion of companies working from home in Halton is small, just 4.2 percent.

Table 61 – Responses by Premises Type Occupied

Type of Accommodation	Number of Companies Responding					Proportion of Companies Responding, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Industrial	29	45	85	38	197	37.0
Office	30	10	70	34	144	27.0
Home	4	16	52	46	118	22.1
Warehouse	18	6	13	11	48	9.0
Site	4	1	3	3	11	2.1
Serviced Office	7	0	0	4	11	2.1
High-tech/Lab	3	1	0	0	4	0.8
Total	95	79	223	136	533	100

Source: BE Group 2009

7.14 Companies were asked to indicate whether they own or rent their property. Table 62 shows that overall there are very similar proportions of companies that rent or own their premises. However examination of each local authority area reveals there are nearly twice as many companies that lease, rather than own, their premises in Halton, with the reverse being the case in Knowsley.

Table 62 –Tenure of Premises Occupied

Tenure of Accommodation	Number of Companies Responding					Proportion of Companies Responding, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
N/a (Work from home)	4	16	52	46	118	22.1
Leasehold	48	19	86	36	189	35.5
Freehold	25	39	75	43	182	34.1
Not Stated	18	5	10	11	44	8.3
Total	95	79	223	136	533	100

Source: BE Group 2009

7.15 Table 63 indicates the sizes of premises occupied by companies. Overall, emphasis is on premises of 500 sqm or less (52.9 percent), with the greatest proportion (26.3

percent) based in premises of less than 100 sqm. Again, when local authorities are looked at individually there are some differences between the areas - most noticeable is in that in West Lancashire only a quarter of companies occupy premises of 500 sqm or less. However, it also has the highest proportion of companies working from home (33.8 percent) and this will skew the figures.

Table 63 – Size of Premises Occupied

Size, sqm	Number of Companies Responding					Proportion of Companies Responding, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
N/a (Work from home)	4	16	52	46	118	22.1
N/a (Occupy a site rather than premises)	4	1	3	3	11	2.1
0-100	26	15	67	32	140	26.3
101-200	14	8	38	20	80	15.0
201-500	17	12	22	11	62	11.6
501-1000	5	6	11	12	34	6.4
1001-2000	6	7	11	3	27	5.1
2001-5000	9	11	8	6	34	6.4
5001-10,000	0	1	2	0	3	0.6
10,001-20,000	1	0	0	1	2	0.4
20,001-50,000	1	0	0	0	1	0.2
Not stated	8	2	9	2	21	3.9
Total	95	79	223	136	533	100

Source: BE Group 2009

- 7.16 Respondents were asked to comment on whether they were satisfied with their present accommodation, and if not to explain why. Table 64 shows that 91.9 percent are content. Sefton and West Lancashire have the highest proportions of companies that are satisfied with their premises. Knowsley has the highest proportion of unsatisfied companies.

Table 64 – Satisfaction with Current Premises

Satisfaction with Premises	Number of Companies Responding					Proportion of Companies Responding, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Very satisfied	52	47	159	56	314	58.9

Satisfaction with Premises	Number of Companies Responding					Proportion of Companies Responding, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Satisfied	34	20	50	72	176	33.0
Unsatisfied	7	11	13	3	34	6.4
Very unsatisfied	1	1	1	5	8	1.5
Not stated	1	0	0	0	1	0.2
Total	95	79	223	136	533	100

Source: BE Group 2009

- 7.17 Of the 42 companies that are unsatisfied with their property or site, all but four gave reasons why. Eleven companies are in buildings that are too old or need upgrading, ten are in premises that are too small and three feel that their property is too expensive. Other reasons include properties having poor security, poor access, being in an unsuitable area and there being insufficient facilities nearby. Although there is no dominant reason why companies are unsatisfied in Halton, property being too old was the reason given by two companies in West Lancashire and six in Knowsley, and in Sefton five out of 12 companies have outgrown their premises. A full list of reasons is shown in Appendices 17 to 20.

Future Accommodation Requirements

- 7.18 Companies were asked to indicate whether they are considering moving premises in the next twelve months, or two to three years. 112 companies indicated that they are intending to relocate; with 76 of them proposing that this will happen in the next year. Halton has the highest proportion of companies considering moving (31.6 percent), Sefton the lowest (16.6 percent).
- 7.19 All but three companies planning to move cite the amount of floorspace likely to be required. In some instances a range of sizes is indicated. By adding these together an overall need is calculated as shown in Tables 81 and 82. Three companies are moving outside the study area. Both gross and net figures are provided. The net figure takes into account the likelihood that the majority of the planned moves will release back onto the property market the premises presently occupied – to be reused by other businesses. Under both scenarios industrial need dominates.
- 7.20 Summaries of forecasted future space needs by size, tenure, quality and location type are shown in Tables 65 to 72 (office requirements) and Tables 73 to 80

(industrial requirements). Appendices 13 to 16 show a breakdown of these requirements to the level of individual local authority areas.

Table 65 – Summary of Office Requirements – Size

Size, sqm	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
0-100	2	1	2	3	8	23.5
101-200	6	1	3	6	16	47.1
201-500	1	0	4	0	5	14.7
501-1000	1	0	1	0	2	5.9
1001-2000	0	0	1	2	3	8.8
Total	10	2	11	11	34	100

Source: BE Group 2009

Table 66 – Summary of Office Requirements – Tenure

Tenure	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Freehold	0	0	6	4	10	29.4
Leasehold	2	0	3	3	8	23.5
No preference	8	2	2	4	16	47.1
Total	10	2	11	11	34	100

Source: BE Group 2009

Table 67 – Summary of Office Requirements – Quality

Quality	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Basic	1	1	0	0	2	5.9
Moderate	4	0	5	4	13	38.2
New	2	0	4	6	12	35.3
New or moderate	2	0	0	0	2	5.9
No preference	1	1	2	1	5	14.7
Total	10	2	11	11	34	100

Source: BE Group 2009

Table 68 – Summary of Office Requirements – Location Type

Location Type	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Business Park	7	0	3	4	14	41.2
Town Centre	0	0	4	4	8	23.5
Business Park or Town Centre	2	0	1	0	3	8.8
Business Park or Industrial Estate	1	0	0	2	3	8.8
Business Park or Rural	0	0	0	1	1	2.9
No preference	0	2	3	0	5	14.7
Total	10	2	11	11	34	100

Source: BE Group 2009

Table 69 – Halton Summary of Office Requirements – Area

Area	Number of Requirements
Daresbury	2
Anywhere Halton	2
Runcorn	1
Widnes	1
Runcorn or anywhere Halton	1
Widnes or anywhere Halton	1
Motorway Corridor	1
The Midlands	1
Total	10

Source: BE Group 2009

Table 70 – Knowsley Summary of Office Requirements – Area

Area	Number of Requirements
Anywhere Knowsley	1
Huyton	1
Total	2

Source: BE Group 2009

Table 71 – Sefton Summary of Office Requirements – Area

Area	Number of Requirements
Southport	6
Bootle	1
Crosby	1
Formby	1
Anywhere North West	1
No preference	1
Total	11

Source: BE Group 2009

Table 72 – West Lancashire of Office Requirements – Area

Area	Number of Requirements
Anywhere West Lancashire	3
Ormskirk	3
Skelmersdale	1
Ormskirk/Burscough	1
Rufford/Mawdesley	1
Anywhere in West Lancashire/anywhere Merseyside	1
Southport	1
Total	11

Source: BE Group 2009

- 7.21 There are 34 requirements for office premises, with the most sought after size being 101-200 sqm. The majority of companies have no preference regarding tenure (47.1 percent), however, in Sefton over half the companies require freehold offices. There is a strong preference for moderate quality existing or new premises on business parks. There is also demand, to a lesser extent, for office premises in town centres. Most companies are looking for premises of the same or a larger size to their current premises. One company (a printing firm) that currently occupies an office wants to relocate to industrial premises (no reason given).
- 7.22 With regards to the preferred area for new office accommodation, this varies between each local authority area. There is no particularly favoured area in Halton, Knowsley or West Lancashire, however in Sefton six of the eleven requirements are for Southport. One company is leaving the study area (relocating to the Midlands).

Table 73 – Summary of Industrial Requirements – Size

Size, sqm	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
0-100	2	2	2	1	7	9.1
101-200	4	3	6	4	17	22.1
201-500	3	2	4	1	10	13.0
501-1000	3	3	4	2	12	15.6
1001-2000	4	2	5	6	17	22.1
2001-5000	2	3	2	2	9	11.7
Over 5000	1	0	1	0	2	2.6
Not stated	1	1	1	0	3	3.9
Total	20	16	25	16	77	100

Source: BE Group 2009

Table 74 – Summary of Industrial Requirements – Tenure

Tenure	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Freehold	5	4	8	5	22	28.6
Leasehold	4	4	3	6	17	22.1
No preference	11	8	14	5	38	49.4
Total	20	16	25	16	77	100

Source: BE Group 2009

Table 75 – Summary of Industrial Requirements – Quality

Tenure	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Basic	2	0	3	1	6	7.8
Basic or moderate	0	0	1	0	1	1.3
Moderate	10	9	13	10	42	54.5
New	1	3	3	1	8	10.4
New or moderate	1	0	0	0	1	1.3
No preference	6	4	5	4	19	24.7
Total	20	16	25	16	77	100

Source: BE Group 2009

Table 76 – Summary of Industrial Requirements – Location Type

Location Type	Number of Requirements					Proportion of Requirements, percent
	Halton	Knowsley	Sefton	West Lancashire	Total	
Industrial Estate	15	15	18	7	55	71.4
Industrial Estate/ Business Park	1	0	3	2	6	7.8
Business Park	1	1	0	1	3	3.9
Town Centre	0	0	1	1	2	2.6
Industrial Estate/Rural	0	0	0	1	1	1.3
Rural	1	0	0	1	2	2.6
No preference	2	0	3	3	8	10.4
Total	20	16	25	16	77	100

Source: BE Group 2009

Table 77 – Halton Summary of Industrial Requirements – Area

Required Area	Number of Requirements
Widnes	7
Anywhere Halton	5
Runcorn	3
Runcorn/Widnes	1
Runcorn/anywhere Halton	1
Motorway Corridor	1
Outside Borough of Halton	1
Gloucestershire	1
Total	20

Source: BE Group 2009

Table 78 – Knowsley Summary of Industrial Requirements – Area

Required Area	Number of Requirements
Anywhere Knowsley	7
Kirkby	4
Huyton	1
Anywhere Merseyside	1

Required Area	Number of Requirements
Liverpool	1
Kirkby/anywhere Knowsley	1
Not stated	1
Total	16

Source: BE Group 2009

Table 79 – Sefton Summary of Industrial Requirements – Area

Required Area	Number of Requirements
Southport	11
Bootle/Netherton	4
Anywhere Merseyside	3
Formby	2
Anywhere north west	1
Anywhere Sefton	1
Crosby	1
Crosby/Formby/Maghull	1
Bootle/Netherton/Crosby/Aintree/ Liverpool/Maghull	1
Total	25

Source: BE Group 2009

Table 80 – West Lancashire Summary of Industrial Requirements – Area

Required Area	Number of Requirements
Skelmersdale	5
Anywhere West Lancashire	4
Burscough	1
Skelmersdale/Burscough	1
Skelmersdale/Burscough/Ormskirk	1
Motorway Corridor/anywhere North West	1
Liverpool	1
Birkdale	1
Isle of Man	1
Total	16

Source: BE Group 2009

- 7.23 77 companies have requirements for industrial premises, with the most popular size bands being 101-200 and 1001-2000 sqm. Only five companies wish to downsize. Half do not have a preference regarding tenure – and the others are evenly split.

Most companies want moderate quality premises (although a quarter have no preference). Over 70 percent require an industrial estate location.

7.24 Again, the preferred area for new accommodation obviously varies between each local authority area. However particular areas stand out more than they did for the office requirements. Widnes is the preferred location for Halton-based companies, Southport for Sefton's and Skelmersdale for West Lancashire's. However in Knowsley demand is more widespread, with seven companies stating 'anywhere in Knowsley'. Two companies are leaving the study area (one relocating to the Isle of Man, the other to Gloucestershire).

Table 81 – Total Office Requirements

Area	Number	Gross Floorspace Requirements, sqm	Net Additional Need, sqm
Halton	10	1308-2900	905-1300
Knowsley	2	101-300	101-200
Sefton	11	2609-5800	903-1700
West Lancashire	11	2608-5500	2107-3700
Total	34	6626-14,500	4016-6900

Source: BE Group 2009

Table 82 – Total Industrial Requirements

Area	Number	Gross Floorspace Requirements, sqm	Net Additional Need, sqm
Halton	20	29,097-42,381	4030-8329
Knowsley	16	10,213-23,800	2803- 6100
Sefton	25	17,422-37,400	9807-20,300
West Lancashire	16	11,114-23,400	6504-13,800
Total	77	67,846-126,981	23,144-48,529

Source: BE Group 2009

7.25 Tables 81 and 82 show the domination of industrial demand over the office sector both in terms of total floorspace required and number of requirements. This is particularly true for Knowsley where there are only two office requirements but 16 for industrial premises. The range is wide because of the size bands used, and also because a number of companies are looking for premises over 1000 sqm.

Land Requirements

- 7.26 There is only one land requirement. This is from a Sefton company that currently occupies a 0.8 ha site. It wants a 2 ha freehold site anywhere in Merseyside.

Property Factors

- 7.27 101 out of the 112 companies expecting to move in the next three years stated the most important factor(s) when looking for alternative accommodation. These are shown in Table 83. Several companies gave more than one reason.

Table 83 – Most Important Factor(s) When Seeking Alternative Accommodation

Factor	Number of Companies Commenting				
	Halton	Knowsley	Sefton	West Lancashire	Total
Location (on an industrial estate, with passing trade, near to current premises, etc)	8	5	19	12	44
Cost	9	5	17	8	39
Specification of property (e.g. needs to be freehold, good quality, have storage space, etc)	10	1	10	11	32
Size	8	9	9	3	29
Accessibility (near to motorway/good road network, accessible to vehicles/staff)	10	2	6	3	21
Security	4	0	1	2	7
Parking	3	0	3	0	6
Good public transport links	1	0	2	1	4
Business support from local council	1	2	0	1	4
Local environment (attractive area, low pollution)	1	0	2	0	3
Facilities for staff	1	1	0	0	2
Good broadband connection	1	0	0	0	1
Availability of grants	1	0	0	0	1
Signage	0	0	1	0	1
Availability of local labour	0	0	0	1	1
Facilities at premises (serviced office)	0	0	0	1	1
Total Number of Comments	58	25	70	43	196

Source: BE Group 2009

- 7.28 The most important factor is location, for example the need for premises to be on an industrial estate or close to current property. Cost, the specification of premises (for

example the need for a property to be freehold, good quality or with storage space), size and accessibility are also seen as being very important. Companies in each local authority area have different priorities when it comes to moving – for Halton’s companies, the specification of a property and accessibility are the most important factors; for Knowsley’s companies it is premises size, and for Sefton’s and West Lancashire’s companies it is location.

Perceptions/Comments

- 7.29 Over a third of respondents (37.1 percent) made additional comments relating to the wider business environment, with some making several comments. A full list of these comments can be found in Appendices 17 to 20. Companies in each local authority area have raised different issues.
- 7.30 In Halton and Knowsley the most common issues are the perceived lack of business support and funding available to companies. Several Knowsley companies have also mentioned the need for security to be improved on Knowsley Industrial Park.
- 7.31 A number of Sefton companies made reference to the need for road infrastructure improvements, as well as business rates being too high (despite the latter being a central rather than local government matter). The need for more business support, the lack of property options, parking issues and general upkeep issues were also frequently mentioned. The need for a bypass in Ormskirk was the issue most commonly raised by West Lancashire companies, as well as concerns about public transport, road infrastructure and congestion.

Summary

- 7.32 Most companies requiring office space want premises up to 200 sqm, with the most sought after size being 101-200 sqm. The majority of companies have no preference with regards to tenure; however there is a strong preference for moderate and new premises on business parks and, to a lesser extent, in town centres.
- 7.33 Despite the general economic shift from industrial to service sector activity, the survey has found demand for industrial premises to be higher than demand for offices. This applies both in terms of the number of requirements and the total floorspace requirement. Most requirements are for units up to 2000 sqm with the most popular size bands being 101-200 sqm and 1001-2000 sqm. Again, there is no clear tenure preference, but most companies require moderate quality premises.

Industrial estates are by far the most popular location for companies seeking industrial property.

7.34 The findings in Section 4 assessed supply of available premises. In Tables 84 – 88 the available properties are aligned to the identified company requirements as one test of the supply and demand position. As Table 84 illustrates, overall the study area provides plentiful choice with the exception of office premises in excess of 501 sqm. Indeed the analysis shows there is currently very little choice of larger office premises. There is however generally a good supply of freehold and/or good quality premises for both industrial and office occupiers.

7.35 Comparison of supply against the demand from the company survey, at the level of the individual local authorities highlights the following:

- 62 percent of all the sub-100 sqm office units are in Halton. Yet the borough has little office space above 501 sqm despite the role that Daresbury Park and Preston Brook play as out of town business park locations in the M56 corridor
- There is a reasonable spread of industrial property sizes in Halton but a lower number of premises in the 501-1000 sqm range than any of the other three boroughs
- Although Knowsley has some 16 percent of the office supply, in terms of number of premises, the company survey has identified negligible demand. The borough has the greatest share (42 percent) of the good quality/new industrial properties available across the study area. However the ratio of 1:7 between company survey requirements and the number of available properties is the largest of any local authority area
- Sefton has the lowest number of freehold office premises available. This mirrors the evidence that the borough has the least amount (11.2 percent) of office properties of any of the local authority areas. There are a limited number of large industrial premises, with the identified demand almost in equilibrium with the number of available properties in the 1001-2000 sqm size band. The ratio of demand requirements to premises available, at 1:4, is the lowest of all four areas
- West Lancashire has less than 4 percent of the total supply of office premises. And whilst the demand identified is also very low there is an excess over supply in the 1001-2000 sqm size band. The district has 21

percent of the total number of available industrial properties, although it has the second lowest ratio of number of requirements to available premises (1:5).

Table 84 – Overall Premises Supply and Demand Analysis

Requirement Property Size, Sqm	Industrial		Office	
	Available Units	Number of Requirements	Available Units	Number of Requirements
0-100	49	7	202	8
101-200	64	17	40	16
201-500	78	10	69	5
501-1000	76	12	10	2
1001-2000	58	17	7	3
2001-5000	32	9	3	0
5001 +	25	2	1	0
No size stated	0	3	0	0
Freehold	94	22	77	10
Good Quality/New	91	8	89	12

Source: BE Group 2009

Table 85 – Halton Premises Supply and Demand Analysis

Requirement Property Size, Sqm	Industrial		Office	
	Available Units	Number of Requirements	Available Units	Number of Requirements
0-100	19	2	126	2
101-200	12	4	14	6
201-500	27	3	34	1
501-1000	10	3	5	1
1001-2000	24	4	3	0
2001-5000	12	2	1	0
5001 +	8	1	0	0
No size stated	0	1	0	0
Freehold	21	5	32	0
Good Quality/New	16	1	39	2

Source: BE Group 2009

Table 86 – Knowsley Premises Supply and Demand Analysis

Requirement Property Size, Sqm	Industrial		Office	
	Available Units	Number of Requirements	Available Units	Number of Requirements
0-100	3	2	24	1
101-200	15	3	6	1
201-500	23	2	16	0
501-1000	25	3	3	0
1001-2000	19	2	2	0
2001-5000	8	3	2	0
5001 +	9	0	0	0
No size stated	0	1	0	0
Freehold	28	4	13	0
Good Quality/New	38	3	13	0

Source: BE Group 2009

Table 87 – Sefton Premises Supply and Demand Analysis

Requirement Property Size, Sqm	Industrial		Office	
	Available Units	Number of Requirements	Available Units	Number of Requirements
0-100	19	2	15	2
101-200	26	6	7	3
201-500	14	4	12	4
501-1000	18	4	1	1
1001-2000	6	5	1	1
2001-5000	5	2	1	0
5001 +	2	1	0	0
No size stated	0	1	0	0
Freehold	26	8	7	6
Good Quality/New	31	3	5	4

Source: BE Group 2009

Table 88 – West Lancashire Premises Supply and Demand Analysis

Requirement Property Size, Sqm	Industrial		Office	
	Available Units	Number of Requirements	Available Units	Number of Requirements
0-100	8	1	37	3
101-200	11	4	13	6
201-500	14	1	7	0

Requirement Property Size, Sqm	Industrial		Office	
	Available Units	Number of Requirements	Available Units	Number of Requirements
501-1000	23	2	1	0
1001-2000	9	6	1	2
2001-5000	7	2	0	0
5001 +	6	0	0	0
Freehold	19	5	25	4
Good Quality/New	6	1	32	6

Source: BE Group 2009

- 7.36 The survey confirms the strength of micro and small businesses in the study area; the need for business park/industrial estate property solutions; the continuing need for industrial units and the importance of cost, accessibility and location to businesses.
- 7.37 The survey has identified (totalled from Tables 81 and 82) potentially up to 55,000 sqm of property is needed. Most is for industrial space. However this estimate makes no allowance for the recycling of existing space, and therefore the lower end figure of net need of about half this sum, (27,000 sqm) is considered a better approximation.
- 7.38 Given that these findings reflect a ten percent sample of businesses in Halton, Knowsley and Sefton, and fourteen percent of those in West Lancashire (we assume that those who did not respond to the survey are unlikely to require premises, so the sample size is 1040 – eleven percent of the study area's total business), the likely land and property need could be substantially higher – perhaps 9 times as great.
- 7.39 Taking the minimum net industrial floorspace need for each local authority area (identified in Table 82) this would equate to a land need of about 6 ha for the study area over the next three years. This is based on standard property development rates of 3900 sqm/ha applied to the net additional need of at least 23,144 sqm. It also assumes that the majority of the office requirements (Table 81) will be satisfied in town centres via 'land-less' property redevelopment, while the industrial requirements will need 'new land'. Extrapolating this by a factor of 10 (for Halton, Knowsley and Sefton), and 7 for West Lancashire, to reflect the survey sample (see paragraphs 7.6-7.9 and Table 58) would generate a total land need of some 54 ha, for the next three years. This would split down to local authority area level as follows:

- Halton 10 ha
- Knowsley 7 ha
- Sefton 25 ha (split 60:40 North Sefton:South Sefton)
- West Lancashire 12 ha.

7.40 The 54 ha figure can only be viewed as a guide. It takes no account of any size skew amongst businesses surveyed, the amount of vacant space, the increasing office (rather than industrial) based employment, nor the fact figures may be unduly pessimistic as the survey was conducted during the onset of the economic recession. Conversely it excludes extrapolation of the company survey identified office requirements that could reflect a further 8.5 ha need (split 44:27:27:2 respectively between West Lancashire, Halton, Sefton and Knowsley). Although planning policy might seek to steer this to town centres, the indications from the survey are that most demand is to locate on the edge of/out of centre office parks that exist in all four local authority areas.

7.41 It should be remembered that the company survey is just one strand of evidence. It illustrates pent-up demand. It is not the sole answer; obviously not all the company requirements will come to fruition as shown by the survey returns. Equally there will be other companies who were surveyed that stated that they do not intend to relocate at the moment, but which may well do so over the next five years. It should be noted that the company survey was undertaken prior to the onset of the economic recession. This is likely to impact on future plans and the timing of these plans.

8.0 EMPLOYMENT LAND

Introduction

- 8.1 This section looks at the existing portfolio of land in the study area, not only how much there is, but also its quality, type, suitability and availability. The study area needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices, including those from higher technology operations.
- 8.2 By initially establishing how much land there is, the second aspect is to consider how much land is needed in the future to 2026.

Land Supply

- 8.3 The starting point for the supply side assessment is each Council's survey of land (baseline April 1st 2008) that identifies 161 sites suitable for employment uses, totalling 507.42 ha (see Tables 89 to 92). These sites are deemed to be the current 'available' land supply. Each Council has a different protocol for monitoring employment land which has created some difficulties in maintaining a consistent approach. The following schedule also therefore includes buildings with planning permission for conversion/redevelopment. These 'sites' have been included at the request of the respective local authorities. Normally BE Group's approach would be to not consider them as 'employment land'.
- 8.4 Tables 89 to 92 schedule the location of each site; its size; provides comments on its current status (e.g. owner intentions) together with an assessment (by BE Group) as to when it might come forward for development and its likely use – industrial or office. This assessment of timescale is based upon a number of factors – general market demand overview (from discussions with stakeholders), supply pipeline, ownership situation, planning status, infrastructure and services required. Consequently, although all the sites are notionally available, BE Group's assessment establishes actual availability. This is explained later in this section. Detailed proformas for each site are provided at Appendices 21 to 24.

Table 89 – Halton Employment Sites Schedule

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
Runcorn				
8/1	Rivington Road, Whitehouse Industrial Estate, Runcorn	1.57	Owner: Husco International Aspiration/use: Part under development for trackside feeder station; owner to retain rest as expansion land Potential type: Industrial	5+
53/5	Davy Road, Astmoor Industrial Estate, Runcorn	0.39	Owner: SG Blair & Co Aspiration/use: Expansion land for SG Blair & Co's adjacent premises Potential type: Industrial	5+
225/1	Land North of Daresbury, Keckwick Lane, Runcorn	3.50	Owner: NWDA Aspiration/use: Part proposed for Vanguard Innovation Centre; part available for development Potential type: Office	0-1
236/1	Manor Park II, Site 3, Manor Park Avenue, Runcorn	1.11	Owner: Homes and Communities Agency Aspiration/use: Constrained by electricity pylon in middle of site. Been out to tender, but no interest in the site. Potential type: Industrial/Office	1-3
237/0	Manor Park III Residue, Runcorn	1.26	Owner: Homes and Communities Agency Aspiration/use: Undevelopable site, to be transferred to HBC to manage as landscape associated with wildlife corridor Potential type: Industrial	5+
240/0	Land north of junction 11 M56, Daresbury Park, Runcorn	4.52	Owner: Marshall Aspiration/use: Undevelopable area, earmarked for landscaping and roads for site 240/7 Potential type: Office	5+
240/7	Plot 4 & 5 Daresbury Park, Runcorn	7.64	Owner: Marshall Aspiration/use: Development land available Potential type: Office	1-3
241/0	Land north of junction 11 M56, Daresbury Park, Runcorn	21.85	Owner: Marshall Aspiration/use: Development land available Potential type: Office	1-3
241/2	Plot 7 Phase III, Daresbury Park,	2.05	Owner: Marshall Aspiration/use: Development land	1-3

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
	Runcorn		available Potential type: Office	
241/3	Daresbury Office Park, North Redbrow Lane, Runcorn	4.26	Owner: Marshall Aspiration/use: Under development for offices Potential type: Office	0-1
246/0	West of Daresbury Lab, Runcorn	3.34	Owner: Science & Technology Facilities Council Aspiration/use: Likely to be developed for office/labs scheme in 2010/11 Potential type: Office	3-5
247/0	East of Daresbury Lab, Runcorn	2.70	Owner: Daresbury Properties Aspiration/use: Owner proposing office scheme in 2009 Potential type: Office	1-3
250/0	South of Daresbury Lab, Runcorn	2.34	Owner: Science & Technology Facilities Council Aspiration/use: Likely to be held as expansion land for Daresbury Laboratory Potential type: Office	1-3
251/0	Chester Road, Runcorn	2.30	Owner: Halton Borough Council Aspiration/use: Potential development site Potential type: Industrial/Office	1-3
252/0	Rocksavage, Runcorn	1.49	Owner: Homes and Communities Agency Aspiration/use: Affected slightly by Mersey Gateway Project highways improvements, being retained until then Potential type: Office/Industrial	5+
254/0	Manor Park III, East of Manor Park II, Runcorn	9.50	Owner: Homes and Communities Agency Aspiration/use: North 4 ha undevelopable; southern 5.5 ha under development/available Potential type: Industrial/Office	1-3
254/2	Sector B, Manor Park 3, Blackheath Lane, Runcorn	0.98	Owner: Homes and Communities Agency Aspiration/use: To be developed for owner-occupier in 2009 Potential type: Industrial/Office	1-3
299/0	Weston Link Storage/Shipping, Weston Point	4.43	Owner: Stobart Group Aspiration/use: To be developed in	1-3

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
	Dock, Runcorn		2009 for feeder port Potential type: Industrial	
308/0	Ivy House, Marsh Lane, Runcorn	0.16	Owner: Private Individual Aspiration/use: Owner would like to develop for waste recycling centre Potential type: Industrial	1-3
325/1	Commonside Farm, Daresbury Lane, Runcorn	0.53	Owner: Daresbury Dairy Farm Ltd Aspiration/use: Car parking and landscaping for adjacent development Potential type: Office	5+
376/0	17 Arkwright Road, Astmoor Industrial Estate, Runcorn	0.15	Owner: Private Individuals Aspiration/use: Potential development opportunity Potential type: Industrial	1-3
384/0	EBL Properties, Sutton Quays, Clifton Road, Runcorn	0.19	Owner: EBL Properties Aspiration/use: Office scheme proposed for 2009 Potential type: Office	1-3
385/0	The Heath Business Park, Runcorn	4.77	Owner: S.O.G Aspiration/use: Development sites available Potential type: Office/Industrial	1-3
378/0	Former Intellicoat Technologies, Warrington Road, Manor Park, Runcorn	0.15	Owner: Branlow Aspiration/use: Servicing/landscaping area for adjacent unit Potential type: Industrial	5+
382/0	Adjacent Unit 9, Cormorant Drive, Runcorn	0.09	Owner: Taylor Firth Runcorn Aspiration/use: Development on hold due to credit crunch Potential type: Industrial	1-3
392/0	Aston Lane South, Runcorn	0.90	Owner: Introbuild Aspiration/use: Since 1 st April 2008 developed for warehouse Potential type: Industrial	0-1
398/0	Picow Farm Road, Tech Pol, Runcorn	0.55	Owner: EBL Properties Aspiration/use: Under development for industrial scheme Potential type: Industrial	0-1
399/0	TDG, Picow Farm Road, Runcorn	2.18	Owner: TDG European Chemical Division Aspiration/use: Operational site Potential type: Office/Industrial	5+

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
402/0	Clifton Road, Ashville Industrial Estate, Runcorn	0.61	Owner: EBL Properties Aspiration/use: Under development for next phase of Sutton Quays BP Potential type: Office	0-1
403/0	Taylor's Row, Runcorn	0.10	Owner: GK Holdings Aspiration/use: Likely to be developed to expand owner's adjacent premises Potential type: Industrial	1-3
Widnes				
28/0	Shell Green, Dan's Road, Widnes	3.28	Owner: United Utilities Aspiration/use: Easter proposing industrial scheme to start 2009 Potential type: Industrial	0-1
28/3	Shell Green, Dan's Road, Widnes	3.84	Owner: Aston Land Aspiration/use: Owner proposing B1, B2, B8 scheme to start 2009 Potential type: Industrial/Office	0-1
34/3	Foundry Lane, Widnes	0.77	Owner: Stobart Properties Aspiration/use: Stobart using site for temporary offices Potential type: Industrial/Office	1-3
49/0	Johnsons Lane, Widnes	8.66	Owner: Halton Borough Council Aspiration/use: Site identified for employment use within Widnes Waterfront Masterplan. Potential type: Industrial	3-5
142/0	Ditton Road/Speke Road, Widnes	1.44	Owner: Quintain Investments Aspiration/use: Has planning permission for hotel Potential type: Industrial/Office	3-5
196/0	Tanhouse Lane, Moss Bank Road, Widnes	0.96	Owner: St Modwen Aspiration/use: Under development for Heron BP Phase II Potential type: Industrial	0-1
242/0	Ex-Sleeper Depot, Widnes	9.54	Owner: Mosaic Aspiration/use: Consent for 3 industrial units. On hold due to high abnormal costs Potential type: Industrial	5+
253/0	North of Hale Bank Road, Widnes	24.80	Owner: Halton BC Aspiration/use: Proposed intermodal freight centre Potential type: Industrial	5+

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
255/0	Ditton Freight Terminal, Site 1, Widnes	41.56	Owner: O'Connor Properties/AHC Warehousing Aspiration/use: Operational freight depot Potential type: Industrial	1-3
255/1	Desoto Road, Ditton Strategic Site, Widnes	5.90	Owner: Westlink Holdings (Desoto Road owned by AHC) Aspiration/use: Under development for warehouse and lorry park Potential type: Industrial	0-1
256/0	Ditton Freight Terminal Site 2, Widnes	2.10	Owner: Network Rail Aspiration/use: Rail freight sidings (may include passenger rail station) Potential type: Industrial	1-3
294/0	Land at Mill Lane, Mill Lane, Widnes	1.49	Owner: Persimmon/London & Bedford Aspiration/use: Part now developed for housing/part available for development/sale Potential type: Office/Industrial	0-1
294/1	Land at Mill Lane, Mill Lane, Widnes	0.89	Owner: Private Individuals Aspiration/use: Development site Potential type: Industrial/Office	1-3
302/0	Catalyst Industrial Estate, Waterloo Road, Widnes	1.08	Owner: St Modwen Aspiration/use: Site will be lost to Mersey Gateway Project Potential type: Industrial	5+
320/1	Tanhouse Lane, Adjacent Phase 1, Heron Business Park, Widnes	0.89	Owner: St Modwen Aspiration/use: Under development for Heron BP Phase II Potential type: Industrial	0-1
334/0	Appleton Village, Widnes	0.33	Owner: Whitfield & Brown Aspiration/use: Likely to be developed for housing Potential type: Industrial/Office	5+
339/0	Gavin Road, Towngate Business Park, Widnes	0.36	Owner: Towngate Aspiration/use: Used for hardstanding, no intention to develop Potential type: Industrial	5+
351/0	5 Widnes Road, Widnes	0.05	Owner: Commercial Space Aspiration/use: Likely to be developed for non-B1, B2, B8 uses Potential type: Office	5+
360/0	Liver Yard, Ditton	3.10	Owner: Grundy & Co	5+

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
	Road, Widnes		Aspiration/use: In use for sand and gravel extraction Potential: Industrial	
366/0	Lowerhouse Lane/Ditton Road, Widnes	0.18	Owner: Marsh Maintenance Aspiration/use: Site will be lost to Mersey Gateway Project Potential type: Office	5+
368/0	Earle Road, Widnes	0.79	Owner: Langtree Group Aspiration/use: Development postponed due to credit crunch Potential type: Office/Industrial	1-3
371/0	Corner of Tanhouse Lane and Moss Bank, Widnes	0.30	Owner: Forward Partnership Aspiration/use: Under development for office scheme Potential type: Office	0-1
373/0	Land to the north of Brown Street, Widnes	0.57	Owner: Forward Partnership Aspiration/use: Development postponed due to credit crunch Potential type: Industrial	1-3
375/0	Former Clariant Site, Tanhouse Lane, Widnes	0.96	Owner: S Wernick & Sons Aspiration/use: Own operational use plus refurbishment of existing offices as rental properties Potential type: Industrial	1-3
379/0	PDM Desoto Road, Widnes	8.76	Owner: PDM Group Aspiration/use: Existing operational site for PDM Group Potential type: Industrial	5+
401/0	23 Derby Road, Widnes	0.04	Owner: Printel UK Aspiration/use: Likely to be developed for housing Potential type: Office	5+
405/0	18 Lugsdale Road, Widnes	0.08	Owner: Private Individuals Aspiration/use: Owner-occupier likely to convert buildings to offices Potential type: Office	1-3
406/0	298 Hale Road, Widnes	0.09	Owner: Queensbridge Building Contractors Aspiration/use: Likely to be developed for own use in future Potential type: Industrial	1-3
410/0	Heron Business Park, Brown Street, Widnes	0.58	Owner: Riverside Commercial Properties Aspiration/use: Used for operational storage by a number of companies	1-3

Site Ref	Name	Size, ha	Comment/Update	Estimated Availability, years
			Potential type: Industrial	
412/0	Demo RMC House, St Mary's Road, Widnes	0.53	Owner: EBL Properties Aspiration/use: Likely to be developed for residential uses Potential type: Office	5+
413/0	Warrington Road, Widnes	0.30	Owner: Stanley Construction Aspiration/use: Lost to residential uses Potential type: Industrial	5+
414/0	Cromwell Street/Hutchinson Street, Widnes	0.19	Owner: Smart Storage Aspiration/use: Site will be lost to Mersey Gateway Project Potential type: Industrial	5+
Total		210.02		

Source: BE Group/Halton Borough Council 2008

Table 90 – Knowsley Employment Sites Schedule

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
1	Eastern Compound Land, Speke Boulevard, Halewood	18.44	Owner: Tata Aspiration/use: Expansion land for Jaguar factory Potential type: Industrial	5+
2	Land East of Roscoes Wood, Tarbuck Road, Huyton	7.90	Owner: Braidwater Aspiration/use: Proposing high quality business park Potential type: Industrial/Office	1-3
4	Plot 5 Whiston Enterprise Park, Fallows Way, Whiston	0.55	Owner: LW Investments Aspiration/use: Owner landbanking site, which has planning for three industrial units Potential type: Industrial	3-5
4.1	Land to the North of CDMS, Fallows Way, Whiston	0.88	Owner: LW Investments Aspiration/use: Owner landbanking site, has permission for 2987 sqm industrial unit Potential type: Industrial	3-5
6	Perimeter Road/Acornfield Road, Knowsley Industrial Park	7.70	Owner: Knowsley MBC Aspiration/use: Knowsley MBC working with NWDA to bring site forward, expect to develop with private sector joint venture partner for small industrial units Potential type: Industrial	1-3

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
7	Depot Road, Knowsley Industrial Park	3.20	Owner: Knowsley MBC Aspiration/use: Potter Group in process of leasing site from Knowsley MBC for rail freight terminal Potential type: Industrial	5+
8	Marl Road, Knowsley Industrial Park	0.50	Owner: Sonae Aspiration/use: Land available, but not marketed Potential type: Industrial	1-3
9	Arbour Lane, Knowsley Industrial Park	1.40	Owner: Orbit Developments Aspiration/use: Marketing site for leasehold design and build offices Potential type: Office	1-3
10	Hornhouse Lane, Knowsley Industrial Park	3.00	Owner: Marshall Aspiration/use: Marketing site for design and build industrial units Potential type: Industrial/Office	1-3
12	Britonwood, Knowsley Industrial Park	6.35	Owner: BBL Estates Aspiration/use: Site available for sale, but affected by ransom strip issues Potential type: Industrial	1-3
13	Moss End Way (East), Knowsley Industrial Park	2.10	Owner: Knowsley MBC Aspiration/use: Northern section of site in process of being sold to Kings Construction for Aggregate Recycling Facility. Remainder of site available though heavily constrained by services, no immediate plans for it although Knowsley MBC may develop it Potential type: Industrial	1-3
14	Moss End Way (West), Knowsley Industrial Park	4.20	Owner: Knowsley MBC Aspiration/use: Available, but not marketed Potential type: Industrial	1-3
15	North Perimeter Road/Moss End Way, Knowsley Industrial Park	5.30	Owner: Knowsley MBC Aspiration/use: Expansion land for Potter Group's rail freight facility Potential type: Industrial	5+
17	School Boys Plantation, Randles Road, Knowsley Business Park	0.50	Owner: Metal Cleaning UK Aspiration/use: Owner likely to develop industrial scheme in the future Potential type: Industrial	1-3
18	Ainsworth Lane/Penrhyn Road, Knowsley Business Park	0.67	Owner: Caddick Developments and Knowsley MBC Aspiration/use: Northern part is servicing areas, southern is available, but not	1-3

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
			marketed Potential type: Industrial	
19	Gellings Lane, Randles Road, Knowsley Business Park	0.90	Owner: Space North West Aspiration/use: Available, but not marketed Potential type: Industrial	1-3
20	Davis' Pits, Randles Road, Knowsley Business Park	0.53	Owner: Space North West Aspiration/use: Available, but not marketed Potential type: Industrial	1-3
23	Land at Junction of Penrhyn Road/School Lane, Knowsley Business Park	0.60	Owner: Knowsley MBC Aspiration/use: Available, but not marketed Potential type: Industrial	1-3
24	Land between Randles Road and School Lane, Knowsley Business Park	1.20	Owner: Bryken High Speed Turnings and Space North West Aspiration/use: Bryken trying to buy Space North West's land to develop workshop scheme Potential type: Industrial	1-3
25	Part of Dairy Crest/Kraft Site, A580, Knowsley Industrial Park	3.60	Owner: Dairy Crest Aspiration/use: Owner landbanking site Potential type: Office/Industrial	3-5
26	Land off Arbour Lane, Knowsley Industrial Park	1.20	Owner: Knowsley MBC Aspiration/use: Owner developing site for own use Potential type: Office/Industrial	0-1
27	Penrhyn/Villiers Road, Knowsley Business Park	2.10	Owner: Ener-g Holdings Aspiration/use: Owner submitted planning to build 'energy from waste' facility. Surplus 0.8 ha will be released Potential type: Industrial	1-3
28	Land at junction of Gores Road/Acornfield Road, Knowsley Industrial Park	0.70	Owner: Knowsley MBC Aspiration/use: Land being sold to owner-occupier Potential type: Industrial/Office	0-1
31	Land adjacent to Knowsley Rail Freight Terminal, Depot Road, Knowsley Industrial Park	1.00	Owner: Knowsley MBC Aspiration/use: Expansion land for Potter Group Potential type: Industrial	5+
32	Land adjacent to Ether Austin, Ainsworth Lane,	2.30	Owner: Ethel Austin Properties Aspiration/use: Site available, but not	1-3

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
	Knowsley Business Park		marketed Potential type: Industrial	
33	Land at corner of A580/Moorgate Lane, Knowsley Industrial Park	3.30	Owner: Dairy Crest Aspiration/use: Owner landbanking site Potential type: Office/Industrial	3-5
35	Land adjacent to Delphi Delco, Hornhouse Lane, adjacent to junction with South Boundary Road, Knowsley Industrial Park	1.90	Owner: New Capital Developments Aspiration/use: Site likely to be sold for industrial/office scheme once legal dispute resolved Potential type: Office/Industrial	3-5
36	Land between Villiers Court and Overbrook Lane, Knowsley Business Park	0.50	Owner: Calpe Properties Aspiration/use: Expansion land for adjacent unit Potential type: Industrial	1-3
37	Land to East of Cross Huller, Randles Road/Gellings Road/School Lane, Knowsley Business Park	1.00	Owner: Spencer Commercial Property Aspiration/use: Owner intending to use for a car park for adjacent complex – subdivision of factory, marketed as Nexus Potential type: Industrial/Office	5+
38	Land north of Kodak, Acornfield Road, Knowsley Industrial Park	3.30	Owner: IPPE (has long leasehold) Aspiration/use: Site being marketed Potential type: Industrial/Office	0-1
40	Part of Yorkshire Metals, off Coopers Lane, Knowsley Industrial Park	5.10	Owner: Charles Topham Group Aspiration/use: Under development for business park Potential type: Industrial/Office	0-1
41	Land adjacent to BASF, Ellis Ashton Street, Huyton Business Park	0.90	Owner: Not Known Aspiration/use: Site on market Potential type: Industrial	0-1
42	Land adjacent to Gladeswood Road, Knowsley Industrial Park	0.50	Owner: Bodycote Metallurgical Coating (long leasehold) Aspiration/use: BMC's expansion land Potential type: Industrial	5+
103	Land between St Ivel and Yorkshire Metals, A580, Knowsley Industrial Park	8.32	Owner: Langtree Group Aspiration/use: Site marketed for design and build units Potential type: Industrial/Office	0-1
112	Former Brick	1.50	Owner: Ken Goodyear (long leasehold)	1-3

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
	Construction Industry Training Workshops, South Boundary Road, Knowsley Industrial Park		Aspiration/use: Site marketed for development Potential type: Office/Industrial	
114	Land at junction of Wilson Road and Link Road, Huyton Business Park	0.33	Owner: HTL Buses Aspiration/use: Operational land for owner – bus depot yard Potential type: Industrial	5+
118	Kings Business Park Phase 2 (West), Liverpool Road, Prescot	1.43	Owner: Marshall Aspiration/use: To be developed for office park Potential type: Office	1-3
119	Land to rear of Delphi Delco, at junction of South Boundary Road and Moorhouse Lane, Knowsley Industrial Park	0.22	Owner: New Capital Developments Aspiration/use: Site likely to be sold for industrial/office scheme once legal dispute resolved Potential type: Office/Industrial	3-5
127	Premises to the rear of Robcliffe Ltd, Ellis Ashton Street, Huyton	0.14	Owner: Robcliffe Aspiration/use: DVLA using site for vehicle storage Potential type: Industrial	5+
133	Hooper's Insurance Assessors, Admin Road, Knowsley Industrial Park	0.47	Owner: Fredal Ceramics Aspiration/use: Owner using site for customer car park Potential type: Industrial	5+
166	Woodward Road, Knowsley Industrial Park	0.86	Owner: Ashcroft Commercial Developments and Tigerlink Properties Aspiration/use: Ashcroft would like to develop industrial scheme; Tigerlink looking to sell site Potential type: Industrial	1-3
167	County Road/Arbour Road, Knowsley Industrial Park	0.62	Owner: Whitbread Aspiration/use: Owner looking to develop hotel and restaurant Potential type: Office	1-3
168	Rear of Moorgate Point, Moorgate Road, Knowsley Industrial Park	2.55	Owner: Kilmartin Aspiration/use: Likely to be developed for distribution warehouse Potential type: Industrial/Office	1-3
169	Wilson Road/Brickfields, Huyton Business Park	0.56	Owner: Spencer Commercial Property Aspiration/use: Site marketed for design and build units Potential type: Industrial/Office	0-1

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
170	Rear of Garage, Wilson Road, Huyton Business Park	0.67	Owner: Thornburn International Aspiration/use: Site marketed for sale Potential type: Industrial/Office	1-3
174	Pirelli North, Prescott	2.26	Owner: Knowsley MBC Leaseholder: St Modwen Aspiration/use: Proposed for phase II of Prescott Business Park but future development will be pre-lets Potential type: Industrial/Office	1-3
175	Pirelli South, Prescott	29.38	Owner: Prysmian Cables/James Industrial Aspiration/use: Site for sale freehold Potential type: Industrial/Office	3-5
176	Randles Road, Knowsley Business Park	0.33	Owner: Space North West Aspiration/use: Available, but not marketed Potential type: Industrial	1-3
177	Ainsworth Lane, Knowsley Business Park	0.38	Owner: Knowsley MBC Aspiration/use: Site available, leasehold only Potential type: Industrial	1-3
178	Land fronting D Evans Electrical, Wilson Road, Huyton Business Park	0.22	Owner: Harvey Developments Aspiration/use: Owner proposing office scheme Potential type: Office	1-3
181	Units 16-21, Lion Court, Kings Business Park, Prescott	2.15	Owner: Marshall Aspiration/use: Under development for office park Potential type: Office	0-1
182	Kings Business Park Phase 2 (East), Liverpool Road, Prescott	6.59	Owner: Marshall Aspiration/use: Site proposed for office park Potential type: Office	1-3
183	Esselte Ltd, Wilson Road, Huyton Business Park	0.84	Owner: Not known Aspiration/use: Under development for industrial scheme Potential type: Industrial	0-1
184	Kipling Avenue, Huyton Business Park	3.63	Owner: Halewood International Holdings Aspiration/use: Owner proposing housing development on 3.40 ha Potential type: Industrial	5+
Total		156.77		

Source: BE Group/Knowsley MBC, 2008

Table 91 – Sefton Employment Sites Schedule

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
BL108_2	Former Vesty Site, Sefton Business Park, Bridle Road, Netherton	5.29	Owner: Priority Sites Aspiration/use: Site developed as Vesty Business Park Potential type: Industrial/Office	0-1
BL112	Atlantic Park, Dunningsbridge Road, Netherton	19.16	Owner: Royal London Asset Management Aspiration/use: Front of site developed, rear will be developed 2010. Potential type: Office/Industrial	1-3
BL131_4	Former Parcel Force Depot, Trinity Park, Orrell Lane, Bootle	2.82	Owner: Kilmartin (now believed to have been sold on) Aspiration/use: Owner wishes to develop site for industrial units but requires gap funding. Alternative interest for park & ride facility Potential type: Industrial	1-3
BL149	Former Lanstar Site, Hawthorne Road, Litherland	1.15	Owner: Tesco Aspiration/use: Planning permission granted for retail store of 6475 sqm (open November 2009) and employment space of 2592 sqm plus £2 million financial contribution Potential type: Industrial	1-3
BL156_3	Senate Business Park and Girobank, Bridle Road, Netherton	2.53	Owner: Littlewoods Aspiration/use: Site unlikely to be developed by owner due to current market conditions and may revert to Sefton MBC Potential type: Office	1-3
BL156_5	Phase 1, Senate Business Park, Bridle Road, Netherton	1.19	Owner: Sefton MBC Aspiration/use: Priority Sites have option and likely to develop it for office scheme Potential type: Office	1-3
BL156_6	Phase 2, Senate Business Park, Bridle Road, Netherton	0.47	Owner: Sefton MBC Aspiration/use: Priority Sites have option and likely to develop it for office scheme Potential type: Office	1-3
BL158	Farriers Way Industrial Estate, Farriers Way, Netherton	0.53	Owner: Space North West Aspiration/use: Site marketed for design and build development Potential type: Industrial	0-1
BL159	Former Peerless Refinery, Dunningsbridge Road, Netherton	7.04	Owner: Chancerygate Aspiration/use: Owner proposes to develop a proportion of the site as non-B use enabling development. Sefton MBC	1-3

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
			seeking a minimum of 75 percent of the site to be used as B use activity, subject to financial viability assessment. Potential type: Office/Industrial	
BL161	Rear of Atlantic Industrial Estate, Bridle Road, Netherton	0.99	Owner: Sefton MBC Aspiration/use: Northern part will be incorporated into development of Atlantic Park (Site BL112). Southern part to be developed for new Sefton MBC depot Potential type: Industrial/Office	0-1
BL163_2	Switch Car, Wakefield Road, Netherton	4.68	Owner: Carcraft Aspiration/use: Owner looking to develop for mixed-uses. Sefton MBC seeking a minimum of 75 percent of the site to be used as B use activity, subject to financial viability assessment. Alternative interest for park & ride facility Potential type: Office/Industrial	1-3
BL164	Land South of Heysham Road, Heysham Road, Netherton	2.05	Owner: William Rainford Holdings Aspiration/use: Owner is landbanking site Potential type: Industrial/Office	3-5
BL170	Land Adjacent to John's House, Merton Road, Bootle	0.83	Owner: Brian James Aspiration/use: In use as commercial car park, under temporary planning consent Potential type: Office	5+
BL210	Playing Field Adjacent to Former Metal Box, Heysham Road, Netherton	1.08	Owner: Grafton Gale Aspiration/use: Not known Potential type: Industrial/Office	1-3
BL253	Site of Vermont House, 375 Stanley Road, Bootle	0.25	Owner: Sefton MBC Aspiration/use: Site developed for South Sefton Investment Centre (opened November 2008) Potential type: Office	0-1
BL260	Linacre Bridge. Linacre Lane, Bootle	1.01	Owner: Sharon Stockton Aspiration/use: Being marketed as haulage/storage yard to let Potential type: Industrial/Office	0-1
BL283	Sheet Metal Services Site, Sandy Lane Industrial Estate, Seaforth	0.28	Owner: Sheet Metal Services Aspiration/use: Retaining site for own expansion Potential type: Industrial	3-5
BL313	Linacre Lane Gas Works, Bootle	1.33	Owner: National Grid Aspiration/use: Owner proposing	5+

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
			housing development Potential type: Industrial/Office	
ML104_1	Former Sewage Works, Sefton Lane Industrial Estate, Maghull	1.44	Owner: Not known Aspiration/use: Not known Potential type: Industrial	3-5
SL101	Land at Crossens Way, Southport	1.73	Owner: Railex Aspiration/use: Owner wishes to develop for industrial units but requires gap funding. Adjacent sewage works potential constraint Potential type: Industrial	1-3
SL102	194 Cobden Road, Southport	0.40	Owner: Chris Audsley Aspiration/use: Available, but not marketed Potential type: Industrial/Office	1-3
SL103	Land at Junction of Butts Lane and Foul Lane, Southport	1.00	Owner: Gemini Developments Aspiration/use: Site being developed for industrial units Potential type: Industrial	0-1
SL112_10	Remaining area of Southport Business Park, Town Lane Kew, Southport	13.17	Owner: Sefton MBC Part subject to joint venture with Berkley James, part to be with new development partner. 4 ha also proposed for main car dealerships. Aspiration/use: Most of site earmarked for speculative development Potential type: Office	1-3
SL190	Land North East of Slaidburn Crescent, Southport	0.25	Owner: Mr and Mrs Whitlow Aspiration/use: Owner wishes to develop for industrial units Potential type: Industrial	1-3
SL269	66 Virginia Street, Southport	0.06	Owner: Bellway Homes Aspiration/use: Housing led mixed-use scheme. Developer looking to remove employment element of offices Potential type: Office	1-3
Total		70.73		

Source: BE Group/Sefton MBC, 2008

Table 92 – West Lancashire Employment Sites Schedule

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
DE 5.1.12	Selby Place (Site D), Stanley Industrial Estate, Skelmersdale	0.47	Owner: JDM Contracts Aspiration/use: Under development for own building Potential type: Industrial	0-1
DE 5.1.13	Selby Place (Site K), Stanley Industrial Estate, Skelmersdale	0.84	Owner: Vitax Aspiration/use: Under development for own expansion of warehouse Potential type: Industrial	0-1
DE 5.1.14a	North of Asda (XL Plot E), Stanley Extension Site, XL Business Park, Skelmersdale	1.89*	Owner: Lancashire County Council Aspiration/use: Considering servicing to provide small freehold plots for owner-occupier SMES Potential type: Industrial	1-3
DE 5.1.14b	South of Asda, Stanley Extension Site, XL Business Park, Skelmersdale	6.14*	Owner: Gazeley Properties Aspiration/use: Marketing design and build distribution warehouse (24,000 sqm) Potential type: Industrial	1-3
DE 5.1.14c	North of Comet DHL, Stanley Extension Site, XL Business Park, Skelmersdale	11.20*	Owner: Gazeley Properties Aspiration/use: Marketing design and build distribution warehouse (45,000 sqm) Potential type: Industrial	1-3
DE 5.1.15	Gardiniers Place (Site 4), Gillibrands Industrial Estate, Skelmersdale	1.70	Owner: Hills Motors Aspiration/use: In use as vehicle scrap yard Potential type: Industrial	5+
DE 5.1.16	Gardiniers Place (Site 5), Gillibrands Industrial Estate, Skelmersdale	1.30	Owner: Lindsay Containers – in receivership Aspiration/use: Presumed to be expansion land for adjacent properties Potential type: Industrial	3-5
DE 5.1.17	Whitemoss Business Park, Skelmersdale	8.25	Owner: Various Aspiration/use: Part under development, part has planning, part retained for office development. Planning uses restricted to B1(a) and (b)	0-1

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
			Potential type: Office	
DE 5.1.18	Cobbs Clough Road, Skelmersdale	9.82	Owner: Homes and Communities Agency Aspiration/use: Owner would like to market for B2/B8 uses, planning uses restricted to B1 Potential type: Industrial/Office	1-3
DE 5.1.2	Pimbo Road (Site M), Pimbo Industrial Estate, Skelmersdale	3.50	Owner: MA Investments Aspiration/use: On market, may be access issues. Potential type: Industrial	1-3
DE 5.1.20	Tollgate Road, Burscough Industrial Estate	3.49	Owner: Hurlston Brook Aspiration/use: Part of site under development for industrial. Part to be subject of further planning application for industrial Potential type: Industrial	0-1
DE 5.1.21	Tollgate Road/Merlin Park, Burscough Industrial Estate	0.59	Owner: Hurlston Brook Aspiration/use: Site under development for office park Potential type: Office	0-1
DE 5.1.22	Ringtail Road, Burscough Industrial Estate	0.27	Owner: Not Known Aspiration/use: Site in use for concrete batching plant Potential type: Industrial	5+
DE 5.1.23	North Quarry, Appley Bridge	0.66	Owner: Not known – agent Knight Frank Aspiration/use: Site under development for office park Potential type: Office	0-1
DE 5.1.24	Simonswood Site 1, Simonswood Industrial Park	5.02	Owner: Williams Trucks Aspiration/use: Site in use for lorry park Potential type: Industrial	5+
DE 5.1.26	Greaves Hall, Greaves Hall Avenue, Banks	5.21	Owner: Not known – agent Brabner Chaffe Street Aspiration/use: On market, under offer to Keyworker Homes for housing, only 2 ha likely to be retained for office park. Planning uses permit B1. Potential type: Office	1-3
DE 5.1.27	Ormskirk Hospital	0.24	Owner: Southport & Ormskirk Hospital NHS Trust Aspiration/use: Likely to be developed	5+

Site Ref	Name	Size, ha	Comment / Update	Estimated Availability, years
			for hospital residential accommodation Potential type: Industrial/Office	
DE 5.1.5	Priorswood Place (Site R), Pimbo Industrial Estate, Skelmersdale	0.71	Owner: Kilmartin Aspiration/use: Will sell site at correct price, will require right of way across neighbouring MA Investments landholding. Potential type: Industrial	1-3
DE 5.1.7	Staveley Road (Site F), Stanley Industrial Estate, Skelmersdale	3.60	Owner: Homes and Communities Agency Aspiration/use: Marketed Potential type: Industrial	1-3
DE 11	Skelmersdale Town Centre Regeneration	5.00	Owner: Various Aspiration/use: Nominal employment land allocation for Skelmersdale town centre regeneration scheme Potential type: Office	5+
Total		69.90		

Source: BE Group/West Lancashire Borough Council 2009

*Discussions with landowners have led to an increase in the total size of DE1.14 (which has also been divided into 3 parcels). This has increased by 6.05 ha from the size originally indicated in WLBC GIS database.

Sites Analysis

8.5 Table 93 shows how the land is distributed through the study area. Halton has the most sites (38.5 percent); and the most land (41.4 percent). West Lancashire has both the fewest sites (12.4 percent) and smallest amount of land (13.8 percent).

Table 93 – Distribution of Sites

Area	Number of Sites	All Employment Land, ha
Halton	62	210.02
Knowsley	54	156.77
Sefton	25	70.73
West Lancashire	20	69.90
Total	161	507.42

Source: BE Group 2009

8.6 A sub-area breakdown of each local authority area complementing the analysis in this section is included in Appendix 25. A basic summary of the key points of this is included at appropriate places in the remainder of this section.

- 8.7 In Halton, Widnes has just over half the sites (32 of 62), it accounts for almost 60 percent of the land (124.41 ha). The latter is dominated by seven sites within 3MG, totalling 95.76 ha. Knowsley Industrial Park has the majority of the land in Knowsley, 25 of 54 sites and 68.89 ha of the 156.77 ha land total. South Sefton has 80 percent of the sites and 76 percent of the total land, with North Sefton the remainder. Skelmersdale dominates West Lancashire; it is the location of 13 sites and 54.42 ha of the land.
- 8.8 The analysis in Table 94 divides the land between two types of uses – office (B1a and B1b) and industrial (B1c, B2 and B8). Indicatively there is a good mix of the two types across the study area – 105.33 ha are suitable for offices; 240.66 ha for industrial; while 161.35 ha could be used for either purpose. This profile is similar in each local authority area; all have a land portfolio that could meet industrial/office uses.
- 8.9 It is noted that local authority planning departments record employment land as ‘available’ until it is fully developed. Land is therefore deemed ‘available’ even whilst development is under construction. BE Group’s definition is however grounded in market assessment and availability to the market in general. Hence BE Group considers the following as not actually available:
- Land held by developers for speculative or bespoke developments
 - Land being retained by the owners as expansion land for their own future use
 - Land currently under development
 - Land where ownership or other constraints mean it is not being brought forward to the market for employment uses at present.
- 8.10 As a consequence at April 2008 166.11 ha of the total land supply is considered to be genuinely available, using BE Group’s definition. This comprises the columns, ‘On the Market’, ‘Available but not Marketed’ and ‘Partly Available’ in Table 94. Available land represents 28 percent of the supply. Only 87.02 ha of this is being actively marketed for sale. In Knowsley over one third of the supply is available and on the market. However, in Halton and West Lancashire the non-availability situation is more acute. Only in Sefton is the land portfolio close to parity between available and not available sites.

Table 94 – Land Use Status

Area	Site Type	On The Market, ha	Available But Not Marketed, ha	Not Available, ha	Partly Available, ha	Total, ha
Halton	Office	0	3.50	51.21	0	54.71
	Industrial	0	8.81	114.62	0	123.43
	Either	4.77	4.30	21.32	1.49	31.88
	Sub-total	4.77	16.61	187.15	1.49	210.02
Knowsley	Office	1.40	0	11.01	0	12.41
	Industrial	7.63	9.36	46.04	4.87	67.90
	Either	46.73	0	29.73	0	76.46
	Sub-total	55.76	9.36	86.78	4.87	156.77
Sefton	Office	13.17	2.53	2.80	0	18.50
	Industrial	0.53	0	8.67	0	9.20
	Either	5.69	14.88	10.74	11.72	42.95
	Sub-total	19.39	17.41	22.21	11.72	70.73
West Lancashire	Office	0	0	14.50	5.21	19.71
	Industrial	7.10	2.60	30.43	0	40.13
	Either	0	9.82	0.24	0	10.06
	Sub-total	7.10	12.42	45.17	5.21	69.90
Overall Total	-	87.02	55.80	341.31	23.29	507.42

Source: BE Group 2009

8.11 Key points to make about each local authority area are:

- Halton – all the land on the market is in Runcorn
- Halton – limited potential office locations in Widnes
- Halton – Runcorn’s land supply more geared to office than industrial use
- Knowsley – limited land availability in Halewood, Huyton and Knowsley Business Park
- Knowsley – land supply generally favours industrial development
- Sefton – very limited land availability in North Sefton
- Sefton – land supply in both areas capable of accommodating either office or industrial use
- West Lancashire – lack of available land outside Skelmersdale
- West Lancashire – Skelmersdale’s land resource more suited to industrial development.

- 8.12 Each site has been assessed for its expected availability, the point at which it may come to market or be developed. This is derived from consultations with owners, developers, agents, each local authority and other evidence gathered in this study.
- 8.13 Any site now considered as undevelopable is allocated '5+ years' availability. This allows for changing circumstances (e.g. a landowner may give up on higher value aspirations) which may allow sites to be brought forward in the future.
- 8.14 As Table 95 shows there is limited land immediately available for development (72.92 ha), with Halton and Knowsley providing the larger proportions. There is a reasonable range of sites and land falling into the 1-3 and 3-5 year timescales, which should come forward over time. Just over 58 ha is long term land supply, five or more years away. Sefton and West Lancashire have the best land availability of the four local authority areas, the vast bulk of their land falls into the first two categories. Based on the RSS guidance that 30 percent of land should be available at any one time, all four local authorities comply.

Table 95 – Land Use Availability Through Time

Area	Site Type	Availability, years				Total, ha
		0-1	1-3	3-5	5+	
Halton	Office	8.67	36.85	3.34	5.85	54.71
	Industrial	12.48	50.79	8.66	51.50	123.43
	Either	5.33	21.11	1.44	4.00	31.88
	Sub-total	26.48	108.75	13.44	61.35	210.02
Knowsley	Office	2.15	10.26	0	0	12.41
	Industrial	1.74	31.72	1.43	33.01	67.90
	Either	19.18	17.88	38.40	1.0	76.46
	Sub-total	23.07	59.86	39.83	34.01	156.77
Sefton	Office	0.25	17.42	0	0.83	18.50
	Industrial	1.53	5.95	1.72	0	9.20
	Either	7.29	32.36	2.05	1.33	43.03
	Sub-total	9.07	55.73	3.77	2.16	70.73
West Lancashire	Office	9.50	5.21	0	5.00	19.71
	Industrial	4.80	27.04	1.30	6.99	40.13
	Either	0	9.82	0	0.24	10.06
	Sub-total	14.30	42.07	1.30	12.23	69.90
Overall Total	-	72.92	266.41	58.34	109.75	507.42

Source: BE Group 2009

8.15 With regards to land availability in each local authority area:

- Halton – there is a good distribution through the pipeline in both Runcorn and Widnes (n.b. this is both land on the market and land available but not currently marketed)
- Knowsley – Halewood’s supply is all long term, elsewhere it is reasonable
- Sefton – both areas (North and South) have most of their land in the 0-1 and 1-3 year categories
- West Lancashire – the Skelmersdale area lacks availability in the 3-5 year period.

8.16 There are a number of sites that may never come forward (in full or part) because they are reserved for expansion, they are too costly to remediate, they are already occupied, there are aspirations for alternative uses or for other reasons. These sites are shown by individual local authority area in Tables 96-99 and totalled for the study area in Table 100. Sites under development at April 2008 are not included as these will constitute take-up for the year in which they are completed.

Table 96 – Potential Employment Land Losses – Halton

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
Industrial	379/0	PDM Desoto Road, Widnes	8.76	Operational Land	Widnes = 14.46
	360/0	Liver Yard, Ditton Road, Widnes	3.10	Operational Land	
	237/0	Manor Park III Residue, Runcorn	1.26	Undevelopable	
	302/0	Catalyst Industrial Estate, Waterloo Road, Widnes	1.08	Required for Mersey Gateway Bridge	
	410/0	Heron Business Park, Brown Street, Widnes	0.58	Operational Land	
	53/5	Davy Road, Astmoor Industrial Estate, Runcorn	0.39	Expansion Land	Runcorn = 1.90
					Total =

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
	339/0	Gavin Road, Towngate Business Park, Widnes	0.36	Operational Land	16.36
	413/0	Warrington Road, Widnes	0.30	Lost to Residential Use	
	414/0	Cromwell Street/ Hutchinson Street, Widnes	0.19	Required for Mersey Gateway Bridge	
	378/0	Former Intellicoat Technologies, Warrington Road, Manor Park, Runcorn	0.15	Operational Land	
	403/0	Taylor's Row, Runcorn	0.10	Expansion Land	
	406/0	298 Hale Road, Widnes	0.09	Expansion Land	
Industrial/ Office	254/0	Manor Park III, Runcorn	4.00	Constrained Undevelopable Land	Widnes = 2.76 Runcorn = 6.69 Total = 9.45
	399/0	TDG, Picow Farm Road, Runcorn	2.18	Operational Land	
	142/0	Ditton Road/Speke Road, Widnes	1.44	Likely to be Developed for Hotel	
	294/0	Mill Lane, Widnes	0.99	Developed for Housing	
	236/1	Manor Park III, Site 3, Runcorn	0.51	Constrained Undevelopable Land	
	334/0	Appleton Village, Widnes	0.33	Planning consent granted for non-employment use	
Office	240/0	Land north of J11, M56, Daresbury Park, Runcorn	4.52	Servicing Land	Widnes = 0.80 Runcorn = 7.39
	250/0	South of Daresbury Labs, Runcorn	2.34	Expansion Land	
	412/0	Demo RMC House, Widnes	0.53	Planning consent granted for non-employment use	
	325/1	Commonside Farm, Runcorn	0.53	Servicing land/car parking	

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
	366/0	Lowerhouse Lane/Ditton Road	0.18	Required for Mersey Gateway Bridge	Total = 8.19
	351/0	5 Widnes Road, Widnes	0.05	Planning consent granted for non-employment use	
	401/0	23 Derby Road, Widnes	0.04	Planning consent granted for residential use	
Total					Widnes = 18.02 Runcorn = 15.98 Total = 34.00

Source: BE Group 2009

Table 97 – Potential Employment Land Losses – Knowsley

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
Industrial	1	Eastern Compound, Speke Boulevard	18.44	Expansion land	Halewood = 18.44
	15	North Perimeter Road, Knowsley IP	5.30	Rail freight terminal expansion land	Knowsley IP = 6.80
	184	Kipling Avenue, Huyton Business Park	3.40	Owner pursuing residential use on residue of site	Knowsley Business Park 0.97
	31	Depot Road, Knowsley IP	1.00	Expansion land	Huyton Business Park = 3.54
	36	Between Villers Court and Overbrook Lane, Knowsley Business Park	0.50	Expansion land	Total = 29.75
	42	Adjacent Gladeswood Road, Knowsley IP	0.50	Expansion land	
	133	Admin Road, Knowsley Business Park	0.47	Operational site	

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
	127	Ellis Ashton Street, Huyton Business Park	0.14	Operational site	
Office / Industrial	37	Land to east of Cross Huller, Knowsley Business Park	1.00	Car park	Knowsley Business Park = 1.00
Office	167	County Road, Knowsley IP	0.62	Likely to be developed for non-B class uses	Knowsley Industrial Park = 0.62
Total					Halewood = 18.44 Knowsley IP = 7.42 Knowsley Business Park 1.97 Huyton Business Park = 3.54 Total = 31.37

Source: BE Group 2009

Table 98 – Potential Employment Land Losses – Sefton

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
Office / Industrial	BL108_2	Former Vesty Site, Sefton Business Park, Bridle Road, Netherton	5.29	Developed as business park	South Sefton = 8.22
	BL159	Former Peerless Refinery, Dunningsbridge Road, Netherton	1.76	Owner pursuing non-B class uses as enabling development to deliver 5.28 ha of B use on rest of site. Sefton MBC's view is that a minimum of 75 percent of site should be B use. This percentage level to be subject to financial viability assessment.	
	BL163_2	Switch Car, Wakefield Road, Netherton	1.17	Owner pursuing non-B class uses. Reflects Sefton MBC's view is that a minimum of 75 percent of site should be for B use. This percentage level to be subject to a financial viability assessment.	
Office	SL112_10	Remaining area of Southport Business Park, Town Lane, Kew Southport	4.00	Site proposed for main car dealerships to contribute as enabling development for rest of the Business Park	North Sefton = 4.00
Industrial	BL149	Former Lanstar Site, Hawthorne road, Litherland	1.15	Tesco granted permission for a 6475 sqm retail store (opened November 2009). Also for 2595 sqm of employment space, plus a financial contribution of £2 million	South Sefton = 1.43
	BL283	Sheet Metal Services Site, Sandy Lane, Industrial Estate, Seaforth	0.28	Expansion Land	

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
Total					North Sefton = 4.00 South Sefton = 9.65 Total = 13.65

Source: BE Group 2009

Table 99 – Potential Employment Land Losses – West Lancashire

Potential Use	Site Ref	Name	Size, ha	Comment / Update	Total Area, ha
Industrial	DE 5.1.15	Gardiners Place (Site 4), Gillibrands IE, Skelmersdale	1.70	Operational land	Skelmersdale = 3.00 Other = 5.29
	DE 5.1.16	Gardiners Place (Site 5), Gillibrands IE, Skelmersdale	1.30	Expansion land	
	DE 5.1.22	Ringtail Road, Burscough IE	0.27	Operational land	
	DE 5.1.24	Simonswood Site 1	5.02	Operational land	
Office / Industrial	DE 5.1.26	Greaves Hall, Banks	3.21	Owner pursuing non-B class uses	Other = 3.45
	DE 5.1.27	Ormskirk Hospital	0.24	Owner pursuing non-B class uses	
Total					Skelmersdale = 3.00 Other = 8.74 Total = 11.74

Source: BE Group 2009

8.17 In total some 90.76 ha (47 sites) is potentially constrained and unavailable for use for some reason. This is 17.9 percent of the 507.42 ha in the study area. It is a mix of industrial, office/industrial and office land.

Table 100 – Land Supply Summary

Area	Headline Land Supply	Expansion Land	Other Losses	Realistic Land Supply (Headline minus Other Losses)
Halton	210.02	2.92	31.08	178.94
Knowsley	156.77	25.74	5.63	151.14
Sefton	70.73	0.28	13.37	57.36
West Lancashire	69.90	1.30	10.44	59.46
Total	507.42	30.24	60.52	446.90

Source: BE Group 2009

8.18 These potential losses are broken down between expansion land and the other forms, e.g. operational land, earmarked for alternative uses, etc. Although the expansion land is not currently available, it could play a part in accommodating company growth or come forward for development in the future. 30.24 ha is classified as expansion land, most of this being in Knowsley – see Table 100.

8.19 The other ‘losses’ are more problematic as they reduce the headline land supply. In part this reflects sites under construction or now completed. 60.52 ha are affected by these issues across the study area, reducing the headline land supply to a more realistic 446.90 ha. All four local authority areas are affected, some to a greater degree than others:

- Halton – ‘Other Losses’ account for 14.8 percent of the ‘Headline Land Supply’
- Knowsley – 3.6 percent
- Sefton – 18.8 percent
- West Lancashire – 14.9 percent.

Site Grading

8.20 All sites have been graded using a standard scoring system that consists of mainly objective measures. Each site is scored out of 90, made up of nine individual measures, each scored out of ten. These are: proximity to the strategic highway network, prominence, public transport, planning status, services availability, constraints, environmental setting, flexibility and availability. The scoring system is provided in Appendix 26. The scoring illustrates how attractive the site is to developers and occupiers. It is intended to give an objective, transparent appraisal

of the overall quality of the land resource.

- 8.21 Two scores are provided in Tables 101 to 104, a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic highway proximity, prominence, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are easier to improve and hence provide the ability to raise the quality of a site. They are ranked by market-led sub-total, followed by total score.
- 8.22 Overall the sites are of average quality. This is illustrated by the fact 66 percent of the sites have total scores in the 40 to 60 range. There are few high scoring sites, though for market-led scores there is representation in Halton, Knowsley and West Lancashire of sites scoring 35 or more. The highest scoring sites are those close to strategic highways in high profile locations. The detailed scores are provided at Appendix 27. Some sites that are close to each other can score quite differently. This is because of differing levels of prominence, planning status, constraints, etc.

Table 101 – Halton Employment Sites Scoring

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
240/7	Plot 4 & 5 Daresbury Park, Runcorn	7.64	68	39
241/3	Daresbury Office Park, North Redbrow Lane, Runcorn	4.26	85	35
247/0	East of Daresbury Lab, Runcorn	2.70	61	33
240/0	Land north of junction 11 M56, Daresbury Park, Runcorn	4.52	56	33
241/0	Land north of junction 11 M56, Daresbury Park, Runcorn	21.85	65	32
246/0	West of Daresbury Lab, Runcorn	3.34	50	32
294/0	Land at Mill Lane, Mill Lane, Widnes	1.49	63	29
252/0	Rocksavage, Runcorn	1.49	45	29
241/2	Plot 7 Phase III, Daresbury Park, Runcorn	2.05	71	28
225/1	Land North of Daresbury, Keckwick Lane, Runcorn	3.50	64	28
294/1	Land at Mill Lane, Mill Lane,	0.89	56	28

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
	Widnes			
250/0	South of Daresbury Lab, Runcorn	2.34	47	27
253/0	North of Halebank Road	24.80	50	26
392/0	Aston Lane South, Runcorn	0.90	72	25
402/0	Clifton Road, Ashville Industrial Estate, Runcorn	0.61	67	25
242/0	Ex. Sleeper Depot	9.54	47	25
251/0	Chester Road, Runcorn	2.30	47	25
254/0	Manor Park III, East of Manor Park II, Runcorn	9.50	52	24
28/3	Shell Green, Dan's Road, Widnes	3.84	55	23
385/0	The Heath Business Park, Runcorn	4.77	52	23
53/5	Davy Road, Astmoor Industrial Estate, Runcorn	0.39	46	22
399/0	TDG, Picow Farm Road, Runcorn	2.18	44	22
236/1	Manor Park II, Site 3, Manor Park Avenue, Runcorn	1.11	44	22
384/0	EBL Properties, Sutton Quays, Clifton Road, Runcorn	0.19	53	21
8/1	Rivington Road, Whitehouse Industrial Estate, Runcorn	1.57	45	21
28/0	Shell Green, Dan's Road, Widnes	3.28	58	20
254/2	Sector B, Manor Park 3, Blackheath Lane, Runcorn	0.98	50	20
255/0	Ditton Freight Terminal Site 1	41.56	45	20
142/0	Ditton Road/Speke Road, Widnes	1.44	44	20
196/0	Tanhouse Lane, Moss Bank Road, Widnes	0.96	61	19
320/1	Tanhouse Lane, Adjacent Phase 1, Heron Business Park, Widnes	0.89	60	18
371/0	Corner of Tanhouse Lane and Moss Bank, Widnes	0.30	60	18
49/0	Johnsons Lane, Widnes	8.66	36	18
360/0	Liver Yard, Ditton Road	3.10	33	18
398/0	Picow Farm Road, Tech Pol, Runcorn	0.55	64	17
378/0	Former Intellicoat Technologies, Warrington Road, Manor Park, Runcorn	0.15	49	17
325/1	Commonside Farm, Daresbury Lane, Runcorn	0.53	45	17

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
382/0	Adjacent Unit 9, Cormorant Drive, Runcorn	0.09	55	16
256/0	Ditton Freight Terminal Site 2	2.10	43	16
299/0	Weston Link Storage/Shipping, Weston Point Dock, Runcorn	4.43	45	15
302/0	Catalyst Industrial Estate, Waterloo Road, Widnes	1.08	37	15
379/0	PDM, Desoto Road	8.76	37	15
366/0	Lowerhouse Lane/Ditton Road, Widnes	0.18	35	15
414/0	Cromwell Street/Hutchinson Street, Widnes	0.19	32	15
237/0	Manor Park III Residue, Runcorn	1.26	31	15
376/0	17 Arkwright Road, Astmoor Industrial Estate, Runcorn	0.15	52	14
375/0	Former Clariant Site, Tanhouse Lane, Widnes	0.96	48	14
401/0	23 Derby Road, Widnes	0.04	42	14
34/3	Foundary Lane, Widnes	0.77	42	14
368/0	Earle Road, Widnes	0.79	42	14
308/0	Ivy House, Marsh Lane, Runcorn	0.16	40	14
255/1	Desoto Road, Ditton Strategic Site	5.90	48	13
373/0	Land to the north of Brown Street, Widnes	0.57	47	13
334/0	Appleton Village, Widnes	0.33	39	13
410/0	Heron Business Park, Brown Street, Widnes	0.58	35	13
413/0	Warrington Road, Widnes	0.30	35	12
339/0	Gavin Road, Towngate Business Park, Widnes	0.36	48	11
403/0	Taylor's Row, Runcorn	0.10	51	10
405/0	18 Lugsdale Road, Widnes	0.08	47	9
412/0	Demo RMC House, St Mary's Road, Widnes	0.53	32	9
351/0	5 Widnes Road, Widnes	0.05	30	9
406/0	298 Hale Road, Widnes	0.09	46	8

Source: BE Group 2009

Table 102 – Knowsley Employment Sites Scoring

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
182	Kings Business Park Phase 2 (East), Liverpool Road, Prescot	6.59	67	39
118	Kings Business Park Phase 2 (West), Liverpool Road, Prescot	1.43	67	35
2	Land East of Roscoes Wood, Tarbuck Road, Huyton	7.90	54	34
33	Land at corner of A580/Moorgate Lane, Knowsley Industrial Park	3.30	57	31
32	Land adjacent to Ether Austin, Ainsworth Lane, Knowsley Business Park	2.30	60	30
103	Land between St Ivel and Yorkshire Metals, A580, Knowsley Industrial Park	8.32	59	30
25	Part of Dairy Crest/Kraft Site, A580, Knowsley Industrial Park	3.60	55	29
40	Part of Yorkshire Metals, off Coopers Lane, Knowsley Industrial Park	5.10	70	28
174	Pirelli North, Prescot	2.26	54	28
181	Units 16-21, Lion Court, Kings Business Park, Prescot	2.15	70	28
27	Penrhyn/Villiers Road, Knowsley Business Park	2.10	55	25
1	Eastern Compound Land, Speke Boulevard, Halewood	18.44	54	25
24	Land between Randles Road and School lane, Knowsley Business Park	1.20	54	24
37	Land to East of Cross Huller, Randles Road/Gellings Road/School Lane, Knowsley Business Park	1.00	48	24
175	Pirelli South, Prescot	29.38	42	24
19	Gellings Lane, Randles Road, Knowsley Business Park	0.90	61	23
176	Randles Road, Knowsley Business Park	0.33	55	23
17	School Boys Plantation, Randles Road, Knowsley Business Park	0.50	53	23
112	Former Brick Construction Industry Training Workshops, South Boundary Road, Knowsley	1.50	47	23

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
	Industrial Park			
35	Land adjacent to Delphi Delco, Hornhouse Lane, adjacent to junction with South Boundary Road, Knowsley Industrial Park	1.90	43	23
4.1	Land to the North of CDMS, Fallows Way, Whiston	0.88	52	22
4	Plot 5 Whiston Enterprise Park, Fallows Way, Whiston	0.55	50	22
9	Arbour Lane, Knowsley Industrial Park	1.40	50	22
6	Perimeter Road/Acornfield Road, Knowsley Industrial Park	7.70	48	22
10	Hornhouse Lane, Knowsley Industrial Park	3.00	55	21
38	Land north of Kodak, Acornfield Road, Knowsley Industrial Park	3.30	55	21
167	County Road/Arbour Road, Knowsley Industrial Park	0.62	51	21
177	Ainsworth Lane, Knowsley Business Park	0.38	51	21
23	Land at Junction of Penrhyn Road/School Lane, Knowsley Business Park	0.60	51	21
183	Esselte Ltd, Wilson Road, Huyton Business Park	0.84	60	20
169	Wilson Road/Brickfields, Huyton Business Park	0.56	54	20
36	Land between Villiers Court and Overbrook Lane, Knowsley Business Park	0.50	52	20
18	Ainsworth Lane/Penrhyn Road, Knowsley Business Park	0.67	50	20
14	Moss End Way (West), Knowsley Industrial Park	4.20	48	20
133	Hooper's Insurance Assessors, Admin Road, Knowsley Industrial Park	0.47	46	20
41	Land adjacent to BASF, Ellis Ashton Street, Huyton Business Park	0.90	48	20
184	Kipling Avenue, Huyton Business Park	3.63	42	20
15	North Perimeter Road/Moss End Way, Knowsley Industrial Park	5.30	39	20

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
20	Davis' Pits, Randles Road, Knowsley Business Park	0.53	57	19
178	Land fronting D Evans Electrical, Wilson Road, Huyton Business Park	0.22	51	19
166	Woodward Road, Kirkby	0.86	47	19
114	Land at junction of Wilson Road and Link Road, Huyton Business Park	0.33	45	19
12	Britonwood, Knowsley Industrial Park	6.35	45	19
26	Land off Arbour Lane, Knowsley Industrial Park	1.20	54	18
170	Rear of Garage, Wilson Road, Huyton Business Park	0.67	48	18
13	Moss End Way (East), Knowsley Industrial Park	2.10	48	18
31	Land adjacent to Knowsley Rail Freight Terminal, Depot Road, Knowsley Industrial Park	1.00	37	18
7	Depot Road, Knowsley Industrial Park	3.20	35	18
168	Rear of Moorgate Point, Moorgate Road, Knowsley Industrial Park	2.55	49	17
8	Marl Road, Knowsley Industrial Park	0.50	45	17
28	Land at junction of Gores Road/Acornfield Road, Knowsley Industrial Park	0.70	45	17
127	Premises to the rear of Robcliffe Ltd, Ellis Ashton Street, Huyton	0.14	39	13
42	Land adjacent to Gladeswood Road, Knowsley Industrial Park	0.50	39	13
119	Land to rear of Delphi Delco, at junction of South Boundary Road and Moorhouse Lane, Knowsley Industrial park	0.22	32	12

Source: BE Group 2009

Table 103 – Sefton Employment Sites Scoring

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
BL112	Atlantic Park, Dunning's Bridge Road, Netherton	19.16	68	32
BL159	Former Peerless Refinery, Dunning's Bridge Road, Netherton	7.04	56	30
BL149	Former Lanstar Site, Hawthorne Road, Litherland	1.15	58	27
BL163_2	Switch Car, Wakefield Road, Netherton	4.68	56	27
BL161	Rear of Atlantic Industrial Estate, Bridle Road, Netherton	0.99	53	23
BL131_4	Former Parcel Force Depot, Trinity Park, Orrell Lane, Bootle	2.82	51	23
BL108_2	Former Vesty Site, Sefton Business Park, Bridle Road, Netherton	5.29	64	22
BL158	Farriers Way Industrial Estate, Farriers Way, Netherton	0.53	55	21
BL156_3	Senate Business Park and Girobank, Bridle Road, Netherton	2.53	53	21
BL156_5	Phase 1, Senate Business Park, Bridle Road, Netherton	1.19	58	20
ML104_1	Former Sewage Works, Sefton Lane Industrial Estate, Maghull	1.44	33	20
BL156_6	Phase 2, Senate Business Park, Bridle Road, Netherton	0.47	57	19
SL112_10	Remaining area of Southport Business Park, Town Lane Kew, Southport	13.70	51	19
BL170	Land Adjacent to John's House, Merton Road, Bootle	0.83	50	19
BL260	Linacre Bridge. Linacre Lane, Bootle	0.93	41	19
BL164	Land South of Heysham Road, Heysham Road, Netherton	2.05	37	19
BL210	Playing Field Adjacent to Former Metal Box, Heysham Road, Netherton	1.08	54	18
BL253	Vermont House, 375 Stanley Road, Bootle	0.25	64	17
BL283	Sheet Metal Services Site, Sandy Lane Industrial Estate, Seaforth	0.28	53	14

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
BL313	Linacre Lane Gas Works, Bootle	1.33	34	14
SL103	Land at Junction of Butts Lane and Foul Lane	1.00	52	12
SL190	Land North East of Slaidburn Crescent, Southport	0.25	49	11
SL101	Land at Crossens Way, Southport	1.73	27	10
SL269	66 Virginia Street, Southport	0.06	44	8
SL102	194 Cobden Road, Southport	0.40	32	6
BL112	Atlantic Park, Dunnings Bridge Road, Netherton	19.16	68	32

Source: BE Group 2009

Table 104 – West Lancashire Employment Sites Scoring

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
DE 5.1.17	Whitemoss Business Park, Skelmersdale	8.25	68	37
DE 5.1.7	Staveley Road (Site F), Stanley Industrial Estate, Skelmersdale	3.60	58	30
DE 5.1.14c	North of Comet DHL, Stanley Extension Site, XL Business Park, Skelmersdale	11.20	44	29
DE 5.1.14b	South of Asda, Stanley Extension Site, XL Business Park, Skelmersdale	6.14	55	27
DE 5.1.14a	North of Asda (EXL Plot E), Stanley Extension Site, XL Business Park, Skelmersdale	1.89	45	24
DE 5.1.2	Pimbo Road (Site M), Pimbo Industrial Estate, Skelmersdale	3.50	40	23
DE 5.1.18	Cobbs Clough Road, Skelmersdale	9.82	38	23
DE 5.1.12	Selby Place (Site D), Stanley Industrial Estate, Skelmersdale	0.47	62	22
DE 5.1.5	Priorswood Place (Site R), Pimbo Industrial Estate, Skelmersdale	0.71	52	22
DE 5.1.23	North Quarry, Appley Bridge	0.66	61	21
DE 5.1.16	Gardiners Place (Site 5), Gillibrands Industrial Estate, Skelmersdale	1.30	47	21
DE 5.1.15	Gardiners Place (Site 4), Gillibrands Industrial Estate,	1.70	42	21

Site Ref	Name	Site, ha	Total Score, max 90	Market-led Sub-total, max 40
	Skelmersdale			
DE 5.1.13	Selby Place (Site K), Stanley Industrial Estate, Skelmersdale	0.84	61	19
DE 5.1.20	Tollgate Road, Burscough Industrial Estate	3.49	55	18
DE 5.1.21	Tollgate Road/Merlin Park, Burscough Industrial Estate	0.59	53	16
DE 5.1.24	Simonswood Site 1, Simonswood Industrial Park	5.02	43	16
DE 5.1.26	Greaves Hall, Greaves Hall Avenue, Banks	5.21	28	13
DE 5.1.27	Ormskirk Hospital	0.24	31	9
DE 5.1.22	Ringtail Road, Burscough Industrial Estate	0.27	33	8
DE 11	Skelmersdale Town Centre Regeneration	5.00	N/A	N/A

Source: BE Group 2009

8.23 The scoring system is just one method to use when assessing sites. There will be exceptions that prove the rule. However it gives general guidance in terms of those sites scoring well are the ones to be protected – at least more so than those scoring poorly. However low scoring sites can still have a role to play in satisfying the needs of all sectors of the study area’s businesses. This is particularly so for this study area, where location, environment and historic activity mitigate against high scores.

Assessment

8.24 In Section 6.0 assessments are provided for the 92 existing Employment Areas (urban and rural); Employment Opportunity Sites and Action Areas considered in connection with this study. Together they represent 2947.18 ha. Some 14.8 percent of this total is represented by remaining undeveloped land. 9.8 percent is considered to represent regeneration opportunities.

8.25 Tables 105 to 108 contain the summaries for each local authority district, subdivided to the geographic areas identified in the brief. For each entry the total site area; land remaining to be developed, and BE Group’s considered regeneration opportunities are provided, together with recommendations regarding retention, remodelling, mixed use activity or de-allocation from employment use.

Table 105 – Halton Summary of Existing Employment Areas

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Runcorn				
Ashville Industrial Estate, Runcorn	13.97	0.19	0.00	Retain as local employment area for B1/B2/B8 uses. Scope to expand by 3.28 ha
Astmoor Industrial Estate, Runcorn	78.55	0.70	10.49	Retain as key employment area for B1/B2/B8 uses. Scope to re-masterplan and remodel prompted by Mersey Gateway Bridge construction
Daresbury Park, Runcorn	58.70	40.32	0.00	Retain as Regional Investment Site flagship office park
Daresbury Science & Innovation Centre, Runcorn	31.41	11.88	0.00	Retain as Regional Investment Site flagship science park
Halton Lea, Runcorn	12.35	0.00	1.14	Mixed use area for B1 offices/commercial uses. A site of 2.43 ha has outline consent for retail. This is therefore not an employment regeneration opportunity. Remodel vacant 1970s offices
Halton Road, Runcorn	8.33	0.10	0.56	Retain as local employment area for B1/B2/B8 uses
Heath Road North, Runcorn	3.95	0.00	1.33	Mixed use area for B1/B2/B8 uses. Remodel canal side for non-employment uses
Manor Park, Runcorn	143.92	13.00	10.63	Retain as sub regional employment area for B1/B2/B8 uses.
Picow Farm Road, Runcorn	13.69	2.82	0.00	Retain as local employment area for B1, B8 uses
Runcorn Docks, Runcorn	44.31	0.00	14.00	Mixed use residential and local employment area (B1, B8 uses)
The Heath,	20.83	4.77	0.00	Retain as sub regional

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Runcorn				B1 business park
Weston Docks, Runcorn	43.73	4.43	14.62	Retain for port-related uses
Whitehouse Industrial Estate and Preston Brook, Runcorn	101.45	4.77	2.17	Retain as sub-regional employment area for B1, B2, B8 uses.
Widnes				
Derby Road/ Moorfield Road, Widnes	36.27	0.00	10.09	Retain as local employment for B1/B2/B8 uses. Scope to remodel Rockwood site
Ditton Strategic Rail Park, Widnes	184.12	95.76	12.36	Retain as Regional Investment Site 3MG Intermodal Freight Interchange
Everite Road Industrial Estate, Widnes	31.43	0.45	3.60	Retain as local employment area of B1/B2/B8 uses
Halebank Industrial Estate, Widnes	67.82	0.77	5.09	Retain as local employment area for B1/B2/B8 uses
Moor Lane, Widnes	33.51	0.05	7.63	Mixed use area to include B1 office and industrial and small B8 functions
St Michael's Industrial Estate, Widnes	11.36	0.00	2.60	Retain as B1/B8 employment area
West Bank, Widnes	59.92	0.00	18.69	Mixed use residential and employment area (B1/B2/B8 uses). Scope to remodel following Mersey Gateway Bridge construction
Widnes Waterfront	139.61	20.90	32.81	Mixed use residential, leisure and employment area, with significant scope to remodel and redevelop employment sites

Source: BE Group 2009

Table 106 – Knowsley Summary of Existing Employment Areas

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Albany Road/Oliver Lyme Road, Prescot	2.76	0.00	1.91	Retain as local employment area, which has scope for remodelling for B1/B2/B8 uses
Chemical Industry Site Depot Road, Knowsley Industrial Park	11.48	0.00	0.00	Retain as rail-related employment area, for B2/B8 uses
Huyton Business Park	114.15	12.99	1.02	Retain as key employment area for B1/B2/B8 uses. Limited scope for re-modelling, and current vacant sites represent small infill opportunities De-allocate Employment Site 184 (3.40 ha) as has no access to the Business Park
Jaguar/Land Rover Plant, Halewood	147.96	18.44	0.00	Retain as key employment area accommodating specialist manufacturing plant. B1/B2/B8 uses
Kings Business Park, Prescot	20.78	8.02	0.00	Retain as flagship office park and sub-regional employment area. B1 office use.
Kirkby Town Centre Action Area	19.30	0.00	0.00	Potential to increase B1 office provision
Knowsley Business Park	122.25	10.30	3.53	Retain as flagship business park and sub-regional employment area for B1/B2/B8 uses. Consider potential expansion through Green Belt boundary modification
Knowsley Industrial Park North	260.65	34.55	16.50	Retain as key employment area for B1/B2/B8 uses.

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
				Considerable scope for remodelling
Knowsley Industrial Park South	124.96	34.34	7.68	Retain as key subregional employment area for B1/B2/B8 uses. Considerable scope for remodelling, especially A580 frontage
Lower Road, Halewood	14.16	0.53	0.00	Retain as employment site for B2 uses
North Huyton Action Area	N/A	0.00	3.30	Opportunity for small scale B1 workspace to serve local population
Ravenscourt District Centre, Halewood	2.90	0.36	0.00	Opportunity to develop small scale B1 offices, to be associated with district centre, on two sites of 0.17 and 0.19 ha
South Prescott Action Area	46.98	2.64	1.70	Retain as subregional employment area for B1, B2, B8 uses
Stoney Lane, Prescott	6.83	0.00	0.00	Retain as local employment site for B1/B2/B8 uses
Tower Hill, Kirkby	N/A	0.00	1.15	Opportunity for starter units/managed workspace to be provided adjacent to existing retail and community facilities
Warrington Road, Prescott	1.32	0.00	0.00	Retain as local employment area

Source: BE Group 2009

Table 107 – Sefton Summary of Existing Employment Areas

Site	Site Area	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Crossens Way, Southport	12.46	1.73	0.00	Retain as local employment site for B1 and small B8 uses
Former Philips Factory, Balmoral Drive, Southport	5.98	0.00	5.98	Retain as local employment site for B1 and small B8 uses. Remodel site
Heysham Road Industrial Estate, Bootle	57.41	14.85	8.19	Retain as key employment area within Dunningbridge Road Corridor Regional Strategic Site. B1, B2, B8 uses. Remodel Leckwith Road area
Formby Business Park, Altcar Road, Formby	13.44	0.00	0.00	Retain as local employment area. Consider more protection for B1/B8 uses.
Blowick Industrial Estate, Southport	28.49	1.40	8.70	Retain as key local employment area for B1, B2, B8 uses. Remodel redundant and underused sites. Consider Green Belt adjustment to enable southward expansion
Slaidburn Crescent, Southport	6.61	0.25	0.00	Retain as local employment area for B1, B8 uses
Southport Business Park, Town Lane, Southport	20.28	13.17	4.89	Retain as flagship office park for North Sefton. Pursue proposed SE re-allocation from residential to office park use – 4.51 ha. Endorse proposals for 4.00 ha main car dealerships scheme to Town Lane frontage
Kensington Industrial Estate, Southport	1.35	0.00	0.00	Retain as local employment area for B1, B8 (trade counters) uses
Birkdale Trading	0.75	0.00	0.00	Retain as local

Site	Site Area	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Estate, Liverpool Road, Birkdale				employment area for B1/B8 uses
Sefton Lane Industrial Estate, Maghull	13.20	1.44	3.14	Retain as local employment area for B1, B2, B8 uses
Aintree Racecourse Retail & Business Park, Aintree	10.80	0.00	0.00	Retain as local employment area for B1, B2, B8 uses
Land South of Aintree Curve, Netherton	6.47	6.47	0.00	De-allocate as employment site because of access and adjacent residential uses
Orrell Mount/Kingfisher Business Park, Hawthorne Road, Bootle	8.27	0.00	0.00	Retain as local employment area for B1, B2, B8 uses
Maritime Enterprise Park, Primrose Road, Bootle	10.86	0.00	6.59	Retain as local employment area for B1, B2, B8 uses. Remodel older sites through selective redevelopment
Land & Premises, Acorn Way, Bootle	5.30	0.93	4.37	Retain as local employment area for B1/B8 uses, in conjunction with HMRI area. Remodel site
Linacre Lane Gas Works, Bootle	4.85	1.33	0.00	Retain as a gas storage facility. Scope for B1 uses on remaining site (subject to sequential test)
South Sefton Business Centre, Canal Street, Bootle	17.50	0.00	0.00	Retain as local employment area for B1, B2 uses
Deltic Way Industrial Estate, Bootle	18.18	5.29	0.00	Retain as local employment area for B1, B2, B8 uses
Bridle Way Industrial Estate, Bootle	73.03	27.69	4.68	Retain as key employment area for B1, B2, B8 uses, as part of Dunningbridge Road Corridor Regional Strategic

Site	Site Area	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
				Site
Premises off Park Lane West, Bootle	9.63	0.00	2.96	Retain as key employment area for B1, B2 B8 uses as part of Dunningbridge Road Corridor Regional Strategic Site
The Peoples Site, Hawthorne Road, Bootle	10.97	0.00	0.00	De-allocate as employment site as is included in next phase of HMRI programme
Port Industrial Area, Bootle	9.56	0.00	3.63	Retain as employment area for B1, B2, B8 uses. Remodel southern area, with potential to integrate with adjoining Liverpool City area

Source: BE Group 2009

Table 108 – West Lancashire Summary of Existing Employment Areas

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Abbey Lane, Burscough	6.42	0.00	3.55	Retain existing employment area as 'bad neighbours'/waste recycling site, including remodelling to develop 0.82 ha at NE boundary. Expand by 2.73 ha (Safeguarded Site under Policy D53) to deliver B1/B2/B8 uses on A59 frontage.
Ainscough Building Supplies, Mossy Lea Road, Wrightington	1.56	0.00	0.00	Retain as rural employment site for B1/B8 uses.
Alty's Brickworks, Hesketh Bank	4.02	0.00	0.00	Retain as local employment site for B1/B8 uses.
Appley Lane	3.78	0.00	0.00	Retain as local

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
North, Appley Bridge				employment site for B1/B8 uses.
Briars Lane, Burscough	2.81	0.00	0.00	Retain as local employment site for B1/B8 uses.
Burscough Employment Area, Burscough	48.17	1.27	0.21	Retain as key local employment area for Burscough and environs, B1/B2/B88 uses. Remodel 0.21 ha west of Tollgate Road. Consider additional allocation through partial release of Green Belt.
Burscough Wharf, Liverpool Road North, Burscough	0.17	0.00	0.17	Consider refurbishment as mixed-use scheme linked to town centre, to include B1/A2 offices.
Co-op Bank Offices, Northway, Skelmersdale	2.60	0.00	0.00	Retain as town centre employment area for offices. Re-appraise in conjunction with town centre redevelopment scheme.
Dawber Delph, Appley Bridge	4.35	1.51	0.00	Retain as local employment area for B1/B2/B8 uses. Scope to expand further 1.51 ha.
Digmoor Road, Skelmersdale	0.95	0.00	0.95	De-allocate as employment site.
East Quarry, Appley Bridge	12.71	0.00	0.00	Consider as mixed-use scheme site to include B1 uses.
Gillibrands Industrial Estate, Skelmersdale	100.26	3.00	3.36	Retain as key sub-regional employment area for B1/B2/B8 uses. Scope to remodel 5.38 ha by linking two undeveloped sites with property now held by receivers. Also scope to reconfigure 1.19 ha of

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
				small units and access area at Gladden Place.
Greaves Hall Business Park, Banks	5.43	0.00	5.43	Consider mixed use scheme to include B1 uses. Scope for wholesale regeneration to deliver rural workspace (B1 uses) with housing.
Hattersley Court, Burscough Street, Ormskirk	3.32	0.00	0.00	Retain as B1 office park.
North Quarry, Appley Bridge	5.12	0.18	0.00	Retain as local employment area for B1 uses.
Ormskirk Employment Area, Ormskirk	3.30	0.00	0.00	Retain as key local employment area for mix of B1.B2/B8 uses to serve Ormskirk.
Orrell Lane, Burscough	2.53	0.00	0.00	Retain as local employment site for B1/B2 uses.
Pilkington R & D Laboratories, Hall Lane, Lathom	8.33	2.20	0.00	Retain as local employment area, primarily for B1 uses. Scope to intensify use.
Pimbo Industrial Estate, Skelmersdale	154.89	4.21	14.63	Retain as sub-regional employment area for B1/B2/B8 uses. Significant opportunities to remodel that could generate 14.63 ha of modern employment sites.
Platts Lane, Burscough	0.50	0.00	0.00	Retain as trade counters estate serving Burscough.
Ravenhead Brickworks, Up Holland	7.79	0.00	0.00	Retain as local employment site for B1/B2/B8 uses.
Reynolds Garage, Southport Road, Scarisbrick	1.83	0.00	0.83	De-allocate as now residential site.
Red Cat Lane, Burscough	4.64	0.00	0.00	Retain as local employment site for B1/B2 uses.

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
School Lane, Haskayne	1.48	0.00	1.48	De-allocate as an employment site. Consider re-allocation as mixed-use site for live-work; housing and community facilities.
Sharrock's Depot, Mossy Lea Road, Wrightington	0.85	0.00	0.00	Retain as rural employment area for B1/B8 uses.
Simonswood Industrial Park, Simonswood	57.41	5.02	14.92	Retain as key local employment site predominantly for B8 uses. Scope to intensify use as logistics park through development of Employment Site DE5.1.24 and remodelling of two areas. Potential to enlarge site by 20.26 ha by allocation of currently open land on the urban fringe.
Southport Road/Green Lane, Ormskirk	0.74	0.00	0.00	Retain as edge of town centre employment site, predominantly for B1 uses.
Stanley Industrial Estate, Skelmersdale	57.97	3.60	2.43	Retain as sub-regional employment area, in conjunction with adjacent XL Business Park. Some limited scope for remodelling of underutilised land at north east corner of the estate.
Tarleton Mill, Plox Brow, Tarleton	4.93	0.00	2.34	Retain as local employment area. Scope to regenerate the mill complex to deliver mix of small B1/B8 uses.
TPT Centre, Railway Road, Skelmersdale	1.61	0.00	1.61	De-allocate as employment land. Consider as future housing allocation.

Site	Site Area, ha	Remaining Area to be Developed, ha (Available Employment Sites)	Regeneration Opportunities, ha	Recommendations
Westgate Employment Area, Skelmersdale	4.93	0.00	0.00	Retain as local employment area for B1 uses.
Whitemoss Business Park, Skelmersdale	14.21	6.00	0.00	Retain as flagship office park location for Skelmersdale. Undeveloped area estimated at 6.00 ha.
XL Business Park, Stanley Industrial Estate Extension, Skelmersdale	36.47	19.23	0.00	Retain as sub-regional employment site primarily for B8 uses (B1, B2, B8 uses possible on plot E (DES.1.14a)).

Source: BE Group 2009

- 8.26 From the assessment of the existing Employment Areas, BE Group consider there are a small number where either the whole, or part of the sites should be considered for release. This is because they are no longer fit for purpose and their locations are better suited to non-employment uses, or alternative development uses are already committed. These are additional to the potential losses identified from the land supply schedules earlier in this section.
- 8.27 Four sites should be de-allocated in their entirety (Table 109). Together they total 10.51 ha. The Peoples Site, Hawthorne Road will also be lost to residential development through the New Heartlands HMRI Programme. The loss of this Employment Area is included in the total losses from HMRI (see Chapter 5).

Table 109 – Existing Employment Areas Proposed For De-allocation from Employment Use

Local Authority	Site Name	Size, ha	Current Allocation	Reasons for De-allocation
Sefton	Land South of Aintree Curve	6.47	Opportunity Site	Inappropriate employment location. Consider as residential site.
West Lancashire	TPT Centre, Railway Road, Skelmersdale	1.61	Employment Area	Derelict site in primarily residential area

Local Authority	Site Name	Size, ha	Current Allocation	Reasons for De-allocation
West Lancashire	Digmoor Road, Skelmersdale	0.95	Employment Area	Derelict site in primarily residential area
West Lancashire	School Lane, Haskayne	1.48	Rural Employment Site	Vacant poor quality buildings in centre of village. Re-allocate for mixed use residential and community uses

Source: BE Group 2009

Strategic Housing Land Availability Assessment (SHLAA) Call For Sites (CFS)

8.28 At Section 2 (Table 19) summary figures are provided for employment sites and employment areas reviewed by each local authority as part of the SHLAA process. And Table 20 summarised CFS data received relating to employment sites; existing employment areas and new sites being mooted for employment – either exclusively or as one of a range of use types proposed.

8.29 BE Group has assessed the SHLAA and CFS data supplied by each local authority. The findings of these assessments, in terms of impact on employment land provision, are outlined on an authority by authority basis.

Halton

8.30 The SHLAA data includes four allocated employment sites considered as possible housing opportunities. The two Widnes sites (Employment Sites 294 and 412) are either fully or partially now committed to residential use. The employment land lost totals 1.52 ha. In Runcorn, Site 403 serves as expansion land for the adjoining occupier, and Site 246 comprises future extension land for Daresbury Science Park. Both these sites should therefore be retained as employment land.

8.31 Of 33 existing developed employment sites suggested as potential housing opportunities, BE Group consider only four should definitely be supported. These are SHLAA references 176; 334; 359 and 463. All are in Widnes, and total 14.76 ha. The largest (Ref 463), Tan House Lane, Widnes is included in the Widnes Waterfront Master Plan for residential use. As noted elsewhere in this report, Runcorn Docks (Ref 288) is supported in terms of the proposals to retain 14 ha for employment use and accommodate housing-led development on the remainder.

8.32 Attention is drawn to a number of the other opportunities as these represent sites that BE Group consider could be beneficially remodelled or regenerated for new employment uses – or where this is already occurring. These sites are scheduled in Table 110.

Table 110 – Halton SHLAA. Developed Employment Land to be Retained for Employment Use

SHLAA Site Ref	Site Name	Size, ha	Comments
86	Rockwood Additives Ltd, Moorfield Road, Widnes	2.02	Part of Derby Road/Moorfield Road Employment Area appropriate for remodelling
114	Moor Lane Business Park, Widnes	1.25	Part of Moor Lane Employment Area, appropriate for remodelling
118	Riverside Business Park, Upper Mersey Road, Widnes	1.96	Part of West Bank Employment Area, to be remodelled following Mersey Gateway Bridge construction
134	Halton Road, Runcorn	2.62	Part of Halton Road Industrial Estate to be retained for employment use due to setting
425	Enviropak, Foundry Lane, Widnes	1.08	New industrial development within Halebank, to be retained
Total		8.93	

Source: Halton SHLAA (2008)

8.33 It should be noted almost all the other remaining developed employment sites included in the SHLAA comprise small (sub <1 ha) sites, often representing a single building. As such they are not deemed to have major impact on land supply, were Halton Borough Council to consider alternative uses. However each needs to be considered on its individual merits rather than a blanket decision that embraces all the properties.

8.34 New employment site opportunities emerging from the CFS process are limited. There are also one or two CFS submissions where existing employment use is sought to be replaced by alternative allocations. Table 111 schedules the CFS sites and provides comments on each.

Table 111 – Halton Potential New Employment Sites Arising From Call For Sites

CFS Site Ref	Site	Present Allocation	CFS Proposal	Size, ha	Comment
UCS 10295	Rocksavage, Clifton Road, Runcorn	Employment/ Greenspace	Employment. Retail/Commercial/ Leisure/Roadside Services	3.54	Good B1 office site. Consider extending existing allocation of 1.49 ha to include greenspace, to total 3.54 ha.
UCS 10273	Manor Farm, Moore	Open Countryside	Employment	22.44	Possible expansion for Manor Park subject to resolving infrastructure
UCS 10287	Land Adjacent to Marsh Gate Cottage, Manor Park, Runcorn	Greenspace	Employment/Retail/ ADS Recycling extension	8.52	Possible extension for Manor Park. 7.92 ha included as Regeneration Opportunity in Table 101
UCS 10288	Land East of Cholmondeley Road, Runcorn	Greenspace	Employment	9.45	Possible new employment site well located for M56 motorway. Close to Rocksavage
UCS 10262	Pavilions, Sandy Lane, Runcorn	Greenspace (playing fields)	Residential/ Employment/ Commercial/Leisure	6.47	Adjoins Weston. More suited as employment site extension
Total				50.42	

Source: Halton CFS (2008)

8.35 Together, the sites identified in Table 107 have the potential to bring forward a further 50.42 ha of employment land in Halton. All of this would be in Runcorn. However 7.92 ha of Site Ref UCS10287 is included as a regeneration opportunity associated with Manor Park (Table 111). This reduces the CFS sites total to 42.50 ha. It is noted two Green Belt sites have been put forward in Widnes (at Farnworth and Hale), but both are isolated locations that would be at odds with the critical mass regeneration underway or planned for the Widnes urban area. Plans for the SHLAA and CFS sites referred to are included at Appendix 28.

Knowsley

8.36 SHLAA data suggests six employment sites as possible housing sites. Three, totalling 9.90 ha, are now committed to residential development. One further site of 3.40 ha is now realistically only developable for housing because of its access arrangements. Table 112 summarises the views for each of the sites.

Table 112 – Knowsley SHLAA. Employment Sites

SHLAA Site Ref	Site Name	Size, ha	Comments
K0155	Former BICC Works, Manchester Road, Prescott (Part of Employment Site 175, Pirelli South)	8.14	Now Site C, South Prescott Action Area. Under construction for housing. Loss from employment supply.
K0179	Kipling Avenue, Huyton Industrial Park (Employment Site 184)	3.40	Landlocked site to rear of the Industrial Park, now only accessible through adjoining housing area. De-allocate from employment.
K0351	Roscoes Wood, Huyton (Part of Employment Site 2)	8.95	Retain for employment as key site close to M62/M57 intersection and adjacent to Huyton Industrial Park.
K0156	Land at Bridge Road, Prescott	1.13	Retain for employment. Scope for B1 office use, town centre related.
K0164	Land adjacent to 8&9 Smithfold Walk, Huyton	1.11	Under construction for housing. Loss from employment supply.
K0359	Land at Steley Way/Manchester Road, Prescott	0.65	Now housing site in South Prescott Action Area. Adjoins K0155. De-allocate from employment
Total		23.38	

Source: Knowsley SHLAA (2008)

8.37 Analysis of Knowsley's CFS data identifies only two sites that fall within allocated employment sites or existing employment areas. Both are located in Huyton. One of the sites relates to Kipling Avenue (SHLAA site ref K0179), which is suggested for de-allocation. The second is Roscoe's Wood, Huyton, which is being promoted for mixed use development, but as a key employment site opportunity should be retained for B1/B2/B8 uses.

8.38 The CFS submissions include two significant landholdings, both in Green Belt, proposed for new employment sites. The sites are located north and south of Junction 6 M62 to the east of the M57. Neither relates to existing employment sites

and is therefore unlikely to be a preferred option early in the LDF period.

- 8.39 A further 32 submissions include reference to possible employment use, either as part of a mixed use development or as second choice behind residential. A quarter of these relate to Cronton Hall (54.8 ha). Ten submissions are linked to Wheathill Farm, Naylors Lane (51.58 ha). Most of these are in Green Belt, with no connection to established employment sites. Many are also very small (less than 0.2 ha), while four are adjacent to residential areas, including Knowsley Village Conservation Area. They are not considered appropriate for new employment allocations.
- 8.40 Table 113 identifies potential new employment sites, from the CFS process, that could be considered for allocation.

Table 113 – Knowsley Potential New Employment Sites Arising From Call For Sites

CFS Site Ref	Site Name	Present Allocation	CFS Proposal	Size, ha	Comment
K0349	Land off Jct 4, M57	Green Belt	Mixed Use	24.38	Possible extension to Knowsley Business Park . Development will be required to retain green belt barrier between Knowsley Business Park and Knowsley Village.
K0217	Windy Arbor Road, land north of Jct 6, M62	Green Belt	Residential, Employment	101.99	Possible new employment site. Less impact on Green Belt. Connected to Whiston.
K0233	Land at School Lane/ Knowsley Lane, Knowsley	Green Belt	Residential, Employment	15.28	Possible extension for Knowsley Business Park, although abuts Conservation Area. Development will be required to retain green belt barrier between Knowsley Business Park and Knowsley Village.

CFS Site Ref	Site Name	Present Allocation	CFS Proposal	Size, ha	Comment
K0253	Saunders Garden Centre, Windy Arbor Road, Whiston	Green Belt	Residential, Employment, Retail, Leisure, Retirement Home	2.14	Possible link with adjacent K0217 site for new employment area.
K0232	Land at Maypole Farm, Knowsley Lane, Knowsley Village	Green Belt	Residential, Employment, Retail, Leisure, Commercial	1.80	Possible extension for Knowsley Business Park, although abuts Conservation Area. Development will be required to retain green belt barrier between Knowsley Business Park and Knowsley Village.

Source: Knowsley CFS (2008)

8.41 BE Group has also identified an additional CFS submission, K0364, Knowsley Lane Farm, which lies to the north of Kings Business Park, adjacent to the M57. Although the CFS proposal suggests only residential use, this is a location that could serve as a successor development for Kings Business Park, accommodating high quality B1 office uses. The area extends to 19 ha. Plans for the referred to SHLAA and CFS sites are included at Appendix 29.

Sefton

8.42 By comparison with the other three local authorities, the Sefton SHLAA data embraces a large number of allocated sites and sites in existing employment use. This is a reflection of the limited availability of land for both employment and housing across the borough.

8.43 Table 114 details the situation for the three allocated employment sites assessed in connection with the SHLAA. All should be retained in employment use.

Table 114 – Sefton SHLAA. Allocated Employment Sites Proposed for Other Uses

SHLAA Site Ref	Site Name	Size, ha	Comment
3158	Vesty Site, South Sefton	6.32	Forms Employment Site BL108-2. Now developed for employment purposes. Retain
6208	Former Parcel Force Site, Netherton Way, South Sefton	2.79	Development proposals for employment use. Retain.
Total		11.75	

Source: Sefton SHLAA (2008)

- 8.44 The 36 sites within existing employment areas or subject of previous employment use have been reviewed to establish whether any could be released. Of the ten sites in North Sefton it is considered that none should be released. All sites should continue in employment use.
- 8.45 There is one other site where employment use is not considered appropriate. This is 6.47 ha of land at Aintree Curve (SHLAA Ref 6025), referred to elsewhere in this study as an inappropriate employment location.
- 8.46 The remaining sites are seen as important to be retained in employment use.
- 8.47 The CFS process has generated a similar overall number of sites that do, or could, influence employment land provision. Only one allocated employment site (6208), at Trinity Park, Bridle Road, Bootle, is proposed for an alternative use. This has been suggested as a park and ride facility. BE Group consider this site should be kept in employment use because of the limited land supply.
- 8.48 Seven sites in existing employment use have been put forward through the CFS process for non-employment uses. Five of the sites are in South Sefton. Assessment suggests that only one of the sites, The Dairy Site, Marsh Brow, Formby could be released. This is a site of 0.10 ha in an established residential area. The sites to be retained are detailed in Table 115.

Table 115 – Sefton Call For Sites. Existing Employment Area Sites to be Retained

CFS Site Ref	Site Name	Current Use	Proposed Use	Site Size, ha	Comment
6030	Bridge Road Industrial Estate, Bridge Road, Litherland, South Sefton	Industry in Residential Area	Residential	0.33	Retain.
6040	Hi Craft/Harry Irving & Co, Sandy Lane, Seaforth, South Sefton	Employment	Residential	1.02	Retain.
6054	Kings Pallets, Powder Works Lane, Maghull, South Sefton	Industry in Green Belt	Residential	0.13	Retain. Links with 6242
6210	Orrel Mount, Bootle, South Sefton	Employment	Residential	0.83	Retain
6242	The Powder Works, Powder Works Lane, Maghull, South Sefton	Industry in Green Belt	Residential	1.02	Retain. Links with 6054
6255	Former Phillips factory, Balmoral Drive, Southport, North Sefton	Employment	Non-employment	5.85	Retain

Source: Sefton CFS (2008)

- 8.49 Three currently non-employment sites have been put forward through the CFS process as proposed new employment sites. Two (CFS ref: 6038/6039) are sites in the Green Belt, north and south of Liverpool Road, Formby adjoining Formby Bypass. Although these would boost the amount of employment land supply for North Sefton, it is considered there is a more appropriate opportunity associated with Formby Industrial Estate, and its expansion could meet need in the Formby area.
- 8.50 The third site comprises Seaforth Nature Reserve. This is a 25.53 ha site, designated as a Site of Local Biological Interest (it is a SSSI site). The site would deliver expansion capability for the Port of Liverpool. As such it is outside the remit of this study.
- 8.51 From reviewing the remaining CFS submissions where employment use is mooted, either as part of mixed use development or as a backstop to residential uses,

attention is drawn to those included in Table 116. All are in North Sefton, and are considered should not be lost to other uses, in view of the limited supply in this part of the borough. Plans for the referred to SHLAA and CFS sites are included at Appendix 30.

Table 116 – Sefton Call for Sites. Properties to be Retained for Employment Purposes

CFS Site Ref	Site Name	Current Notation	Proposed Use	Site Size, ha	Comment
0015	The Print Works, Banastre Road, Southport, North Sefton	Residential Area	Residential	0.18	Retain in view of North Sefton's limited land supply
0161	Water Board Depot, 14 Portland Street, Southport, North Sefton	Residential Area	Residential	0.28	Retain in view of North Sefton's limited land supply
6024	Vacant Land, 72 Tulketh Street, Southport, North Sefton	Southport Town Centre	Residential	0.46	Retain for employment use – town centre related offices.

Source: Sefton CFS (2008)

West Lancashire

8.52 A total of ten sites have been assessed from information generated by the SHLAA process. All the sites are in locations outside Skelmersdale. Only one site, at Haskayne, is considered to have merit in being re-allocated from employment use. Details of the nine sites to be retained are set out in Table 117.

Table 117 – West Lancashire SHLAA. Developed Employment Land to be Retained for Employment Use

SHLAA Site Ref	Site Name	Size, ha	Comments
BK.008	Land at Pingwood Lane, Simonswood	13.07	Retain. Established industrial and logistics estate. Includes two allocated employment sites (DE 5.1.24 and DE 5.1.25)
AB.006	Dawber Delph Quarry, Skull House Lane, Appley Bridge	2.10	Retain as comprises Primary Employment Area
AB.009	Land rear of 7 Appley Lane North, Appley Bridge	0.70	Retain
BU.041	Waste Disposal Centre, Abbey Lane, Burscough	0.37	Retain, located in Primary Employment Area

SHLAA Site Ref	Site Name	Size, ha	Comments
BU.056	Land at Briars Lane, Burscough	2.81	Retain
BU.063	UBH International Ltd, Orrell Lane, Burscough	1.90	Retain, located in Primary Employment Area
BU.068	West Lancs Antique Exports, Orrell Lane, Burscough	0.80	Retain, located in Primary Employment Area
OA.005A	Atkinson & Kirby/WLBC site, Wigan Road, Ormskirk	3.90	Retain B1 office provision within mixed use scheme because town centre location
TA.041	Leighton Oil Depot, Hesketh Lane, Tarleton	0.20	Retain as existing employment site
Total		25.85	

Source: West Lancashire SHLAA (2008)

- 8.53 The former LO Jeffs site, off School Lane, Haskayne is viewed as more appropriate as a housing or live-work, rather than employment, use – possibly in conjunction with community facilities. This represents the only Rural Employment Site to be considered for de-allocation.
- 8.54 The CFS data includes a number of existing Employment Area site allocations being proposed for non-employment or mixed use opportunities. These are additional to the SHLAA sites referred to above. Assessments of these CFS sites suggests all should be retained for employment purposes, with the following exceptions:
- Timson’s Wholesale Poultry, Digmaor Road, Digmaor, Skelmersdale 0.97 ha
 - Former TPT Factory, Railway Road, Skelmersdale 1.60 ha
 - Former LO Jeffs site, Haskayne 1.52 ha
- 8.55 Of the currently non-employment sites proposed for employment use, the vast majority are in green belt. Nevertheless some are assessed as being possible areas of search for future employment land supply to meet need at key locations. These are identified in Table 118. Plans for the referred to SHLAA and CFS sites are included at Appendix 31.
- 8.56 Of the 16 sites chose, ten are adjacent to existing employment areas and represent logical expansion opportunities for those areas. Four sites, west of Scarisbrick and Banks, are adjacent to the Southport urban area and could potentially meet some of the employment land needs of North Sefton. Land at Firwood Road, Skelmersdale (SK1160) is identified in Local Plan Policy DS3 as ‘Safeguarded Land’, which should

be prioritised to meet future land needs. Land at Whitefields Farm, Drummersdale Lane, Scarisbrick (SR14) provides an opportunity to deliver small rural workspace in an area with little existing employment provision.

Table 118 – West Lancashire CFS Data. Possible Future Employment Land Allocations

Site	Current Notation	Size, ha	Comment
Land at Water Lane, Banks BA22	Green Belt	37.8	Proximity to Southport boundary offers scope for new B1/B2/B8 site to serve North Sefton
Land to rear of 1-5 Southport Road, Scarisbrick SR13	Green Belt/ Rural Settlement	2.7	Proximity to Southport boundary offers scope for new B1/B8 site to serve North Sefton
Land to rear of 27 Southport Road, Scarisbrick SR02	Green Belt/ Rural settlement	3.39	Proximity to Southport boundary offers scope for new B1/B8 site to serve North Sefton
17-25 Southport Road, Scarisbrick SR17A	Green Belt/ Rural Settlement	0.50	Proximity to Southport boundary offers scope for new B1/B8 site to serve North Sefton
Former Yew Tree Farm, Higgins Lane, Burscough BU43	Green Belt	32.6	Possible expansion of Burscough Industrial Estate
Land adjacent to Ringtail Road, Burscough BU64	Green Belt	1.2	Possible expansion of Burscough Industrial Estate
Land to the rear of Lordsgate Lane/ Tollgate Lane, Burscough BU65	Green Belt	8.1	Possible expansion of Burscough Industrial Estate
Land at Tollgate Road/ Ringtail Road, Burscough BU67	Green Belt	1.3	Possible expansion of Burscough Industrial Estate
Land at Burscough Airfield, Burscough BU62	Green Belt	11.4	Possible extension for Burscough Industrial Estate
Land east of Tollgate Road, Burscough BU81	Green Belt	8.46	Possible expansion of Burscough Industrial Estate
Whitefields Farm, Drummersdale Lane,	Green Belt	0.6	Possible site for conversion to provide small rural

Site	Current Notation	Size, ha	Comment
Scarisbrick SR14			workspace (B1 use only)
Land at Riverview Nurseries Plox Brow, Tarleton TA013	Protected Land (Policy DS4)	1.4	Possible extension for Tarleton Mill employment site, but access to be from Mill Site, not Hesketh Lane
Highways Depot, Southport New Road, Mere Brow, Tarleton TA026	Green Belt	3.1	Potential to extend existing industrial use to create B1/B8 site with good access and prominence near to Tarleton
Land at Firwood Road, Skelmersdale SK116	Safeguarded Land (DS3)	5.22	Safeguarded sites should be a priority to meet future development needs
Vale Lane/Spa Lane, Lathom SK117	Green Belt	68.7	Possible extension for Stanley Industrial Estate
Land adjacent to the Recycling Centre, Vale Lane, Skelmersdale SK133	Green Belt	7.7	Possible extension for Stanley Industrial Estate

Source: West Lancashire CFS (2008)

Summary

- 8.57 This section has built a picture of the existing and emerging employment land supply by drawing together information from a number of sources. It has been found that with these differing sources there are on occasion different areas identified for the same site.
- 8.58 The local authority databases indicate a headline employment land supply figure of 161 sites totalling 507.42 ha. Halton has the most land 210.02 ha and the most sites, 62. West Lancashire has the fewest sites and least land of the four areas.
- 8.59 Indicatively these comprise a good mix of industrial and office land. However there are potential shortages when assessed against the known level of supply; historic take-up trend data; economic forecasts and local authority aspirations for future growth: a lack of office land in Widnes, Knowsley, Skelmersdale; a lack of industrial land in Runcorn; a lack of both types of land in many parts of Knowsley, North Sefton and West Lancashire (outside Skelmersdale).

- 8.60 Just under one third of the 507.42 ha is indicated as available (166.11 ha). Of this figure around half (87.02 ha) is actively being marketed. The remainder is either defined as 'Partly Available' or 'Available but not Marketed' (Table 94). The bulk of the study area's employment land, is therefore deemed to be unavailable.
- 8.61 BE Group's more detailed assessment of this land supply provides a different perspective about availability. This is based on the point at which the sites may come to the market, or be developed. The assessment reveals only 72.92 ha is immediately (i.e. within one year) available for development. However, 266.41 ha falls into the next category (1-3 years) and so there is no real issue. This is substantially in excess of the 30 percent availability level indicated as required by RSS. This is true across all four local authority areas.
- 8.62 As Table 100 indicates, all of the local authorities are at risk of losing land from their headline land supply. A realistic land supply figure is 446.90 ha. For Halton the loss is around 31 ha. For Sefton it is 13.37 ha; the figure for West Lancashire is 10.44 ha. The local authority least affected by this issue is Knowsley (5.63 ha), which also has quite a large land base to start with.
- 8.63 Sites have been graded to provide an objective, transparent appraisal of the overall quality of the study area's land resource. Gradings suggest provision is of average standard. 66 percent of the sites are graded between 40 and 60 points (90 is the maximum). This ratio also applies to the market score element – a reflection of the locations and legacy of old industrial areas.
- 8.64 Halton has the most sites (13) in the top third of marks (total score of 60 plus). Sefton and West Lancashire each have very few. The latter two authorities also have sites with sub-30 and sub-10 total and market scores respectively.
- 8.65 Assessment of the established employment areas suggests that there is some 289.64 ha of land that provides regeneration opportunities – to recycle or intensify development. This equates to 10 percent of the 2947.18 ha across the study area. As Table 119 illustrates all four local authority areas have regeneration/remodelling opportunities, and these relate to all the key geographic subdivisions highlighted in the brief.

Table 119 – Employment Areas Regeneration/Remodelling Opportunities by Key Sub Areas

Sub Area	Regeneration Opportunities, ha
Runcorn	54.94
Widnes	92.87
Halton Total	147.81
Knowsley Business Park	3.53
Knowsley Industrial Park	24.18
Huyton Business Park	1.02
Prescot	1.91
Action Areas as described in UDP	6.15
Knowsley Total	36.79
North Sefton	19.57
South Sefton	33.56
Sefton Total	53.13
Skelmersdale	22.98
Other Areas	28.93
West Lancashire Total	51.91

Source: BE Group 2009

- 8.66 Undeveloped land within the employment areas represents the vast majority of the study area's available land supply. The assessment has identified additional land totalling 33.12 ha that is no longer considered appropriate for employment use. This includes four sites that should be completely de-allocated (one in Sefton, three in West Lancashire) totalling 10.51 ha.
- 8.67 Both the SHLAA and CFS processes demonstrate the pressure for alternative higher value uses on employment sites and existing employment areas. The pressure appears to be greatest in Sefton, and especially in North Sefton, reflecting in the large number of locations identified.
- 8.68 The assessment of sites put forward identifies scope for the release of employment land in each of the local authority areas. Some of this is already happening due to the grant of residential planning consents. All of the land that could be de-allocated relates to existing Employment Areas or Opportunity Sites in Sefton and West Lancashire (Table 109).
- 8.69 In Halton, Knowsley and West Lancashire the CFS process has brought forward potential employment areas that could deliver new allocations to meet need during the LDF period. However most will require removal from their current Green Belt

designation. For Sefton the situation is one of defending the existing employment land resource across the whole of the borough.

- 8.70 It is important to note that the site suggestions made in this section are intended to inform planning policy decisions only. Future employment land allocations will only occur in the context of the LDF process where proposed sites will be reviewed against relevant planning and sustainability criteria.

9.0 LAND NEED FORECASTING

Introduction

9.1 This section explains the models applied to the assessment of employment land need in the future. The models typically used are:

- Trend based forecast of land take-up
- Labour supply projection
- Forecast based on employment sector change
- Public sector economic development strategies.

9.2 None provide a definite answer, but are influences to be considered. The last three are covered by the economic forecasts commissioned specifically for this study from Oxford Economics. They are also covered by the RSS, as this provides land need forecasts based on the region achieving its jobs and population growth targets.

9.3 The UK economy has entered recession over the course of this study. Although this will obviously affect employment land take-up rates and future economic growth, the report takes a long term view (to 2026). Over this period it is expected that the trends will revert to their long term averages, even though it is acknowledged there will be some short term downturn.

9.4 In addition this section assesses land need disaggregation of the RSS figures (based on the 2005 RELS) to the level of the four local authority areas.

Trend Based Forecast of Land Take-up

9.5 The continuation of the historic trend approach is a relatively straight forward employment land forecasting method. It takes account of the evidence of past performance to create an average building rate. This rate is then factored over the LDF period to calculate a potential land requirement.

9.6 The basis for the calculation is the employment land take-up data produced from the monitoring records of each of the local authorities. With the exception of Knowsley, the local authorities have supplied data for the period 1992 to 2008. Knowsley's data relates to 1995/96 to 2008. The data is set out in Table 116. It should be noted that Knowsley's data is based on sites that have been sold or let, not necessarily built on, in each year. This has historically been sourced from Economic Development rather

than Planning records. For the other authorities data is compiled from development completions records held by the Planning sections.

- 9.7 For each authority three average take-up figures are shown. First, for the whole of the period for which data has been supplied. The second is for the last ten years, and the third for the last five years – to provide evidence of short and medium term trends.
- 9.8 The 528.92 ha of land developed within the study area since 1995/96 (the earliest date from which all authorities have recorded data) equates to an annual average take-up of 40.69 ha. Analysis of the past ten and five years shows almost identical trends of just under 37 ha take-up per annum. The longer term trend (from compilation of the individual local authorities' records for the period data has been supplied) is 37.27 ha.
- 9.9 These global figures do however mask changing situations at individual local authority level:
- Halton has seen a significant rise in take-up during the last five years, over 18 ha per annum from the medium and long term rates of 14 ha
 - Knowsley's short term performance reflects close to a 50 percent reduction from its medium and long term rates, at only 6.7 ha
 - Sefton, like Halton, has experienced a rising take-up over the past five years – an average of almost 3.5 ha – up 16 percent compared to the long term average
 - West Lancashire evidences an incremental rise in take-up from long to medium to short term. However the latter rate of 8.60 ha is heavily influenced by substantial completed development in 2003/04 (almost two thirds of the five year total).
- 9.10 It should be noted there is a lack of correlation between the figures in Table 120 and the take-up rates stated for Halton and Knowsley set out in Table 12, Section 2, which are extracted from the Merseyside Employment Land Study 2004. As the data sources for the 2004 study could not be accessed no definite explanation for discrepancies can be provided. However, it is understood that the figures in Table 12 were for some authorities based on the year work started on site, and for Sefton included port-related sites. Table 120 relates to sites by year completed, and does

not include port-related sites. In addition there may have been corrections made to records since the supply of data for the Merseyside study five years ago.

Table 120 – Study Area Employment Land Take-up 1992-2008

Year	Area Take-up Rates, ha				
	Halton	Knowsley	Sefton	West Lancashire	Study Area
1992/93	2.00	n/a	1.50	1.60	5.10
1993/94	6.00	n/a	2.80	1.60	10.40
1994/95	8.00	n/a	3.10	2.50	13.60
1995/96	10.00	21.85	5.70	7.00	44.55
1996/97	6.96	0	4.90	10.20	22.06
1997/98	39.14	18.21	3.80	17.30	78.45
1998/99	1.13	29.54	1.43	4.80	36.90
1999/00	14.47	10.12	4.87	2.00	31.46
2000/01	23.63	19.02	2.19	4.50	49.34
2001/02	13.60	15.38	0.00	5.80	34.78
2002/03	15.76	17.81	0.42	12.62	46.61
2003/04	10.71	6.88	0.00	28.32	45.91
2004/05	5.69	0	3.30	4.69	13.68
2005/06	26.66	12.95	6.99	3.11	49.71
2006/07	23.11	6.88	5.49	5.44	40.92
2007/08	24.59	6.88	1.64	1.44	34.55
Total, ha	231.45	165.52	48.13	112.92	558.02
Long Term Take-up (total), ha	14.47	12.73	3.01	7.06	n/a
Average Annual Take-up (1998/99-2007/08), ha	14.38	12.55	2.63	7.27	36.83
Short Term Take-up (2003/04-2007/08), ha	18.15	6.72	3.48	8.60	36.95

Source: LAs

Note: Halton's take-up includes sui generis and mixed use; and on multi-modal and regional sites

9.11 It is noted there have been some very productive years in the take-up figures, namely:

- 1997/98 Halton and West Lancashire
- 1998/99 Knowsley
- 2002/03 West Lancashire
- 2003/04 West Lancashire

- 9.12 Consultations with the local authorities have established the following reasons for such high completion rates in these years:

Halton. In 1997/98 ICI completed 14.55 ha at Rocksavage, whilst 5.23 ha was completed at Shell Green, Widnes.

Knowsley. In 1998/99 there were several new investors acquiring large plots from the Borough Council, predominantly on Knowsley Industrial Park and Business Park. There was also significant ERDF gap funding monies available for the development of 'strategic' sites. QVC had just developed their first two phases and acquired land for phases 3 to 5. Also Sonae, Tradeteam, Galaxy and Langtree acquired sites. The first phases of Knowsley Development Partnership also began (Alfred Price and Chums initially), using substantial ERDF monies. The Borough Council also advise that the continued pace of speculative industrial development using ERDF gap funding, which has occurred at Knowsley Business Park since 2000, culminated in a final project (Penrhyn Court) completing in 2008. As result all immediately developable employment sites in the Business Park where taken up.

West Lancashire. The high take-up in 1997/98 was due to developments at Pimbo, Skelmersdale. These included a paper mill development and a large extension to an existing industrial unit. The 2002/03 figure represents the Cadburys/Schweppes new distribution centre. 2003/04 figure relates to the Comet and Asda distribution warehouses on XL Business Park.

- 9.13 The long term take-up trend shows South Sefton dominating the borough of Sefton, with almost four times as much take-up compared to North Sefton. However, since commencement of Southport Business Park there has been a reduction in this gap. The medium term (10 years) sees a 39:61 split between North and South Sefton. The short term (5 years) sees a 35:65 split respectively. The importance to North Sefton of Southport Business Park is evidenced by the fact this development represents over 71 percent of all take-up recorded in the north of the borough since 1992/3 (despite the fact the Business Park only began in 1999/2000).
- 9.14 If past trends continue, the study area will need between 662.94 and 670.86 ha to cater for expected take-up for the next 18 years (2008/09 to 2025/26). And these figures make no allowance for a continuing land supply beyond 2026. The lower

figure reflects the medium term (ten years) average. 670.86 ha reflects the long term average for each local authority area.

- 9.15 Table 121 breaks down the study area's potential land requirement between the four local authority areas. Figures are provided for both the short and long term averages. Employment Land Review guidance suggests a buffer is needed to allow for churn, and to offer continuing range and choice. Table 121 therefore indicates the impact of a 20 percent buffer, in line with RSS. This is applied to both the short and long term figures. However, recent 4NW advice is that the need to apply the flexibility factor will require a judgement from the LPA's (working with 4NW), based on what the evidence base reveals.
- 9.16 These figures do not however take account of the probable impact on take-up rates of the current recession. This is commented on in later in this section.

Table 121 – Employment Land Forecast Requirements 2008-2026
Based on Short and Long Term Trend Take-up

	Short Term			Long Term		
	Take-up Rate pa, ha	Need 2008-26, ha	Need with 20 percent Buffer, ha	Take-up Rate pa, ha	Need 2008-26, ha	Need with 20 percent Buffer, ha
Halton	18.15	326.70	392.04	14.47	260.46	312.55
Knowsley	6.72	120.96	145.08	12.73	229.14	274.97
Sefton	3.48	62.64	75.17	3.01	54.18	65.02
West Lancashire	8.60	154.80	185.76	7.06	127.08	152.50
Total	36.95	665.10	798.05	37.27	670.86	805.04

Source: BE Group 2009

- 9.17 Although Table 121 indicates only a small differential between the short and long term scenarios in terms of requirement for the whole of the study area, there are greater contrasts for some individual local authority areas. The most stark change relates to Knowsley, where there is an almost 100 percent difference between the two scenarios. That Knowsley's requirement is less, when short term performance is used, is in direct contrast to the picture for the three other areas.
- 9.18 There is realistically 446.90 ha of employment land in the study area (from Table 100) which suggests an undersupply of 358.14 ha based on the long term take-up

trend and the need for a five year buffer. As Table 122 illustrates, all four local authorities have an undersupply, although the scale varies considerably between districts. Whilst Sefton has an undersupply of only 7.66 ha, Knowsley has an undersupply of 123.83 ha; West Lancashire an undersupply of 93.04 ha, and Halton an undersupply of 133.61 ha.

Table 122 – Long Term Trend Based Forecast of Land Take-up Summary

Area	Land Required 2008/09-2025/26	Land Required 2008/09-2025/26 plus Buffer	Headline Land Supply	Realistic Land Supply	Overall Land Shortfall/ Requirement (with buffer based on realistic land supply)
Halton	260.46	312.55	210.02	178.94	133.61
Knowsley	229.14	274.97	156.77	151.14	123.83
Sefton	54.18	65.02	70.73	57.36	7.66
West Lancashire	127.08	152.50	69.90	59.46	93.04
Study Area	670.86	805.04	507.42	446.90	358.14

Source: BE Group 2009

9.19 Application of the short-term take-up trend produces a contrasting situation for each district. Halton's undersupply increases by around 100 ha (a 67 percent rise) to 213.10 ha. Sefton's undersupply more than doubles, to 17.81 ha. West Lancashire sees its undersupply increase by one third, to 126.30 ha. Knowsley on the other hand changes to an oversupply of 6.06 ha (some 130 ha less).

Economic Forecasts

9.20 Oxford Economics have produced economic forecasts for the study area using a demand-based modelling technique. This type of modelling relies on the understanding of the macroeconomic context, exploring past trends, and applying key economic relationships. The model accounts for the growth (or decrease) in the workforce; the move to different types of employment; and Government strategic policy that looks to actively change the local economy. The forecast data is provided at Appendix 32.

9.21 Government strategic policy might include, for example, proposals to increase the number of businesses in an area; the servicing of employment land or the creation of new premises (especially for small and start-up businesses); raising the economic

activity rate; reducing unemployment; growing certain, potentially high growth, industry sectors; or reducing out-commuting. All these actions, if pursued aggressively, would have an implication on the need for employment land and premises because more people and businesses would be working locally. These issues in relation to the study area have been factored into the Oxford Economics model.

- 9.22 The expected changes in employment according to the Oxford Economics model are shown in Table 123. As this shows there is a 4.3 percent forecast increase in employment in the study area as a whole (12,130 people). All areas apart from Sefton see an increase in employment. Consequently more employment premises and land may, depending on employment type, be needed to accommodate them. It should be noted that these figures are workplace based, i.e. jobs accommodated locally.

Table 123 – Oxford Economics Model Employment Forecast

Area	Employment		
	2008	2026	Forecast Change
Halton	60,187	69,055	+8,868
Knowsley	60,774	62,303	+1,529
Sefton	110,063	109,682	-381
West Lancashire	51,561	53,675	+2,114
Study Area	282,585	294,715	+12,130

Source: OE 2008

- 9.23 The forecasts factor in changes to likely future occupations which will affect the demand for land. There will be a continuing shift from industrial to office-based employment. The basic principle is that more people working in higher job density office space will mean less employment land is needed to accommodate them. Table 124 shows the change in numbers forecast over the LDF period for the nine main industrial sectors.
- 9.24 As can be seen there is strong growth in Banking, Finance & Insurance; steady growth in Construction, Distribution, Transport and Public Administration; and declines in Agriculture, Energy, Manufacturing and Other Services.

Table 124 – Study Area Employment Occupation Changes

Sector	2008 Number of People	2026 Number of People	Change 2008-2026
Agriculture & Fishing	4080	2481	-1599
Energy & Water	473	281	-192
Manufacturing	33,755	23,222	-10,533
Construction	17,757	19,260	+1,503
Distribution, Hotels & Restaurants	61,758	67,360	+5602
Transport & Communications	17,630	18,107	+477
Banking, Finance & Insurance etc	48,336	61,195	+12,859
Public Administration, Education & Health	82,436	86,797	+4361
Other Services	16,361	16,013	-348
Total	282,586	294,716	+12,130

Source: OE, 2008

- 9.25 This data can be used to assess how much extra land and premises are needed to meet this growth to 2026. The analysis uses standard ratios from a number of research documents in line with ODPM Employment Land Reviews Guidance Notes (2004): SERPLAN's The Use of Business Space 1997; South East Regional Assembly's Use of Business Space and Changing Working Practices in the South East 2004; and Homes and Communities Agency's Employment Floorspace Densities 2001. These assumptions are shown in Table 125. This shows the type of space workers generally occupy; the proportion using office or industrial floorspace; and the average amount of space each worker occupies.

Table 125 – Employment Space Use Definitions

Sector	Proportion of Workforce Occupying Office Floorspace, percent	Proportion of Workforce Occupying Industrial Floorspace, percent	Average Office Floorspace/ Worker, sqm	Average Industrial Floorspace/ Worker, sqm
Agriculture, Extraction, Electricity, Gas & Water	35	26	20	30
Manufacturing	35	35	20	30
Construction	18	35	20	30

Sector	Proportion of Workforce Occupying Office Floorspace, percent	Proportion of Workforce Occupying Industrial Floorspace, percent	Average Office Floorspace/ Worker, sqm	Average Industrial Floorspace/ Worker, sqm
Distribution & Hotels	38	12	20	30
Transport & Communications	39	38	20	40
Financial & Business Services	79	3	20	30
Public Administration & Defence	64	3	20	30
Education & Health	24	2	20	30
Other Services	37	5	20	30

Source: Various

- 9.26 Table 126 applies these assumptions to the number of workers in each sector in the study area in 2008 and 2026. This is then used to create a floorspace requirement for each industry sector and the economy as a whole.

Table 126 – Study Area Economic Forecast Floorspace Need

Sector	Floorspace Required, sqm			
	2008		2026	
	Office	Industrial	Office	Industrial
Agriculture & Fishing	28,560	31,824	17,367	19,352
Energy & Water	3311	3689	1967	2192
Manufacturing	236,285	354,428	162,554	243,831
Construction	63,925	186,449	69,336	202,230
Distribution, Hotels and Restaurants	469,361	222,329	511,936	242,496
Transport & Communications	137,514	267,976	141,235	275,226
Banking, Finance & Insurance, etc	763,709	43,502	966,881	55,076
Public Administration, Education & Health	824,360	61,827	867,970	65,098
Other Services	121,071	24,542	118,496	24,020
Total	2,648,096	1,196,565	2,857,742	1,129,520

Source: Various

Note: Public Administration, Education & Health use ratios of 50 percent working in offices and 2.5 percent in industrial space as an average

- 9.27 The model suggests that the study area's workforce in 2008 needed 2,648,096 sqm of offices and 1,196,565 sqm of industrial space. This takes occupational density ratios literally. However in 2008 the Valuation Office estimated that there was actually only 849,000 sqm of offices, but 5,979,000 sqm of industrial floorspace in the study area. There is therefore a substantial difference to what is in use in practice and the theoretical model. This is illustrative of how it can be difficult to apply such theoretical economic forecasts to the real world.
- 9.28 However this analysis can still be used to indicate the effect of the forecast changes on the need for land and premises. By 2026 the amount of floorspace needed for the study area is 1,132,671 sqm of industrial and 2,859,943 sqm of office space. This is a 5.3 percent industrial floorspace decrease; and an increase in offices of 8.0 percent. The combined change is an overall increase in floorspace of 148,391 sqm, equivalent to a further 38.04 ha of land (at a standard development density ratio of 3900 sqm/ha).
- 9.29 By measuring this percentage increase against the true amount of floorspace in the study area (taken from the Valuation Office data), rather than what the model predicts there to be in 2008, any issues with the assumptions used (floorspace/activity/density) should be removed. Applying the changes illustrated by the model (5.3 percent less industrial space and 8.0 percent more offices) to the Valuation Office estimate of space equates to the study area needing 354,738 sqm less industrial but 75,176 sqm more office floorspace. Combined, this totals 279,562 sqm less floorspace, equivalent to 71.68 ha less land.
- 9.30 This model is somewhat crude and likely to be affected by the future mix of activities in terms of office, manufacturing and warehousing employment within different sectors; it is also impossible to predict the impact of evolving technological change over the study period, and the analysis therefore assumes the current ratios are maintained; and no variation in the density rates is assumed through to 2026.
- 9.31 The property market is not a perfect market, and is rife with market failures (for example the forecasts make no allowance for companies modernising or relocating into different sized properties; that land is not used totally efficiently; that brownfield land will remain undeveloped due to the costs of remedying it; or that some companies occupy more space than they need, etc). Halton provides an example of this. Whilst chemicals manufacturing is contracting this is not releasing land to be

recycled into the general employment land supply. This is because the companies continue to maintain protected exclusion zones to avoid conflict and litigation.

- 9.32 There are a number of further caveats. These forecasts typically indicate higher density employment uses, i.e. offices, negating the need for further employment land. However these theoretical forecasts contradict what is happening in practice, which is continuing development and expansion, even though these theoretical trends have been occurring for some twenty years or more.
- 9.33 There will be a move to higher density employment, however, counter to this and increasing the need for land, will be the continuing growth in numbers of small business; and increasing preference for better quality, more spacious accommodation. BE Group also feel that, more of the 'service sector employment' will be in light industrial premises rather than offices, than is generally predicted.
- 9.34 There is a suggestion that the use of local employment densities would be better indicators for future employment land need within the four local authority areas. It is also viewed that employment densities in manufacturing and warehousing are rising as businesses substitute capital for labour and become more efficient. As a result industrial job losses should release much larger amounts of existing land for other uses, reducing the amount of land needed to accommodate growth sectors.
- 9.35 However this argument would also impact on future provision, with a greater amount of manufacturing employment land required than the forecasts assume.
- 9.36 In the absence of validated local employment densities data, it is considered the ratios identified in Table 125 are appropriate to use.
- 9.37 Disaggregation of the data in Tables 124 and 126, to the level of the individual local authority areas, is detailed in Appendix 33. The implications of the two alternative scenarios (Oxford Economics forecasts and percentage changes against existing floorspace stock) are summarised in Table 127. The rounding of numbers means there is a small differential from the totals produced for the whole of the study area.

Table 127 – Economic Forecast Floorspace Need and Application of Percentage Change to Existing Stock – by Local Authority Area

Area	Oversupply (Land Need) to 2026 based on Oxford Economics Forecasts 2008-2026, ha		Oversupply (Land Need) to 2026 Applying Oxford Economics Forecasts 2008-2026 Percentage Change to Existing VO Stock Data, ha	
	Office	Industrial	Office	Industrial
Halton	(29.99)	(1.77)	(13.68)	(9.04)
Knowsley	(9.30)	7.40	(2.10)	54.72
Sefton	(5.46)	4.53	(1.96)	12.94
West Lancashire	(9.67)	6.22	(1.54)	32.34
Total	(54.42)	16.38	(19.28)	90.96

Source: BE Group/Oxford Economics/VO, 2008

9.38 Because the forecasts are at odds with the reality of existing floor stock, there is considerable difference between the outcomes for the two scenarios in Table 127. However there is consistency in that all authority areas need some more employment land for office use. Only Halton needs more industrial employment land. For the others, application of the forecasts suggests reductions should be made to the existing land supply.

Application of RELS/RSS Forecasting Methodology

9.39 The RSS states that the long term forecasting of employment land need is fraught with uncertainties. It acknowledges that projections can be no more than approximations. Nevertheless RSS sets out sub-regional levels of employment land provision for the period 2005-2021. These levels are based on the following:

- Baseline data of land supply availability (April 2005) and annual take-up rates, supplied to the 2005 RELS study by individual local authorities
- Calculations for a 16 year period i.e. 2005-2021
- Adjustments to the base take-up rates to reflect economic growth, not just historic take-up projected forward. This was on the basis of ‘recent success’ and sought to link GVA increase to the take-up rate. The assumptions applied were an 18.5 percent increase for Merseyside & Halton, but only 4.25 percent for Lancashire
- Introduction of a further 20 percent ‘flexibility factor’ for both Merseyside & Halton and Lancashire to establish land need (reflecting the need for a continuing supply of sites by range, type and quality to allow choice).

- 9.40 RSS therefore sets employment land totals of 1728 ha (for Merseyside & Halton) and 1363 ha (for Lancashire) – increases of around 28 percent on the level of land provision at 2005.
- 9.41 RSS does apply to a different timeframe to the LDF process. RSS begins three years earlier (2005) and addresses only to 2021 (five years shorter than the LDF timescale). However RSS needs to be considered in terms of each local authority's LDF, and although 4NW (as the successor to NWRA) has yet to commence detailed consideration of disaggregation below sub-regional figures, BE Group has endeavoured to do this to inform this study.
- 9.42 The full calculations (based on RELS baseline data) are set out in Appendix 34. These use the RELS land supply and annual take-up rates, the RSS applied uplifts and flexibility factors, to establish:
- Total assumed take-up through to 2021
 - The additional land requirement to 2021, after taking into consideration both the RELS (2005) and this study's (2008) headline supply figures
 - The difference between RELS/RSS take-up projections 2005-2008 and actual take-up during this period.
- 9.43 In summary the figures, disaggregated down to local authority areas show all four need to increase land availability. Recycling of existing land cannot be relied upon to deliver this increase in supply. It will require new allocations, and for West Lancashire especially, the implications are for a very challenging increase.
- 9.44 Table 128 summarises the RELS/RSS forecasts and the impact against the April 2008 headline land supply identified by this report.

Table 128 – RELS/RSS Land Forecasts/Land Supply Comparisons

Local Authority	RELS/RSS 2005-2021 Land Forecast, ha	Actual Take-up 2005-2008, ha	Headline Land Supply 2008, ha	Additional Land Required to 2021, ha
Halton	353.57	74.36	210.02	69.19
Knowsley	278.48	26.71	156.77	95.00
Sefton	109.44	14.12	71.18	24.14
West Lancashire	237.72	9.99	69.90	157.83

Source: 4NW/BE Group 2009 (Extract from Appendix 34)

9.45 A number of observations need to be made about the RELS/RSS data and the analysis of the calculations that lead to the headline figures in Table 128:

- The RELS/RSS annual take-up rates vary from the long term averages identified at the beginning of this section (Table 120). RELS/RSS uses figures that are significantly higher for Sefton and West Lancashire than the long term experience. Sefton is 4.81 ha compared to 3.01 ha (due to the inclusion of port-related sites); West Lancashire is 11.88 ha compared to 7.06 ha. Halton's RELS/RSS figure, at 15.54 ha is marginally greater than the 14.47 ha longer term rate. In contrast, Knowsley has experienced a long term rate of 12.73 ha, which is slightly above the RELS figure of 12.24 ha
- With the exception of Halton, which sees a slight reduction, the authorities see uplift in their share of provision of the sub-regional land supply need. The uplift, whilst marginal for Sefton is substantial for Knowsley and West Lancashire (uplifts of 79 and 128 percent respectively).
- Comparing actual take-up rates against RELS/RSS forecasts, for the period 2005-2008 reveals contrasting performances. Halton saw take-up at 74.36 ha, over 8 ha more than the forecast equivalent for the period. However, Knowsley achieved 26.71 ha, just under half of the forecast. Sefton, with 14.12 ha, did somewhat better, achieving 69 percent of the forecast. But West Lancashire saw only 9.99 ha of take-up – just 22 percent of the forecast total of 44.58 ha
- No allowance has been made for the recycling of existing developed land, nor for sites identified for deletion from the land availability figures because of alternative development uses
- No allowance has been made for the slow down in take-up that will occur in the short term as a consequence of the economic recession.

9.46 In Table 129 the implications for RELS/RSS forecast land need are demonstrated in terms of the following scenarios:

- Removal of 20 percent flexibility factor
- Application of long term take-up figures rather than RELS take-up rates, but including uplift and flexibility factor
- Application of long term take-up figures, including uplift but excluding 20 percent flexibility factor.

Table 129 – RELS/RSS Land Forecasts to 2021 – Alternative Scenarios

	Halton, ha	Knowsley, ha	Sefton, ha	West Lancashire, ha
RELS/RSS Forecast Additional Need Flexibility	69.19	95.00	24.14	157.83
Scenario 1. Removal of 20 percent RELS/RSS Flexibility Factor	10.22	48.62	5.90	118.21
Scenario 2. Application of Long Term Take-up Rates (including uplift and flexibility factor)	44.90	106.02	(16.76)	61.42
Scenario 3. Application of Long Term Take-up Rates with Removal of 20 percent RELS/RSS Flexibility Factor	(9.92)	57.92	(28.18)	37.87

Source: RSS/BE Group 2009

- 9.47 Table 129 illustrates that with the removal of the 20 percent flexibility factor, through to 2021 both Halton and Sefton would need to find only minimal amounts of new employment allocations. This is caveated by the fact there would be no buffer to ensure a continuum of supply for post 2021. For Knowsley there would be an almost 50 percent reduction in the land supply need. West Lancashire would still have a very substantial shortfall of provision.
- 9.48 Using the long term take-up rates identified by BE Group, rather than those applied from the 2005 RELS study similarly has impact on all four local authority areas. Halton's need would reduce to just under two thirds of the RELS/RSS requirement. Knowsley's figure would increase from the RELS/RSS figure by more than 11 percent. Sefton would move to a position of over-provision, of around 17 ha. West Lancashire's need would fall to 38 percent of the RELS/RSS figure.
- 9.49 With the removal of the 20 percent flexibility factor, combined with the use of the long term take-up rates, Halton joins Sefton in having a land oversupply. Both Knowsley and West Lancashire have reduced needs of 58 and 38 ha of additional employment land, respectively.
- 9.50 Whilst it has been important to set out the implications of disaggregating the RSS employment land forecasts, and to highlight associated implications, this study is addressing need to 2026, not the RSS 2021 end date. Consequently it is necessary

to consider a further 6 years supply requirement.

- 9.51 In Table 130 the additional land requirements disaggregated from the RELS/RSS have been adjusted to take account of need to 2026. Illustrations have been provided firstly, for continuation of the enhanced take-up rates used for the RELS/RSS, and secondly using the long term take-up rates – also enhanced in line with the RELS/RSS uplift and flexibility factors. These indicate substantial additional land need for West Lancashire (202-232 ha), Knowsley (182-186 ha) and Halton (172-180 ha). For Sefton the need is significantly less (45-58 ha).

Table 130 – RELS/RSS Based Land Forecasts to 2026

	RELS/RSS Forecast Additional Land to 2021, ha	2021-2026 Take-up RELS/RSS Annual Take-up Rate, ha	Total Additional Land to 2026, ha	2021-2026 Take-Up Long Term Take-up Rate, ha	Total Additional Land to 2026, ha
Halton	69.19	110.49	179.68	102.90	172.09
Knowsley	95.00	87.03	182.03	90.55	185.55
Sefton	24.14	34.20	58.34	21.40	45.54
West Lancashire	157.83	74.50	232.32	44.15	201.98

Source: 4NW/BE Group 2009

Impact of Current Recession

- 9.52 The take-up rates referred to in this section have been achieved during a period of time that has largely experienced a benign economic climate. During this study however the economy has moved into recession, with the expectation being that it is likely to be 2010 or 2011 before economic growth is restored.
- 9.53 This Joint Employment Land and Premises Study addresses the long term requirements. Nevertheless it is realistic to consider how the recession will impact on take-up levels in the short term. By how much, and for how long, is at this time very much subjective. The impact on 2008/09 may well be less than that for the next two to three years, simply because much of the development will have been physically committed before the onset of the recession.
- 9.54 Therefore BE Group consider the trend based forecast of land take-up should see a reduction of 80 percent over a three year period. This would reflect a reduction in need of around 90 ha across the study area, comprising for Halton 34.73 ha;

Knowsley 30.55 ha; Sefton 7.22 ha and West Lancashire 16.94 ha. This is calculated from the long term take-up rates, with no regard to RSS uplift and flexibility factors.

Monitoring Arrangements

- 9.55 Monitoring is an integral part of plan production, a key contributor to the evidence base. As part of this study BE Group has reviewed the monitoring methodologies of the four local authorities to establish whether there is scope for improvement at the collective, or individual, level. Table 131 summarises the monitoring process for each local authority. From the information supplied it is noted all the Planning sections are now monitoring information on employment land take-up. Knowsley's system has only been in place for the past three years (hence the use of Economic Development sourced data for the trend take-up rate calculations at the beginning of this section).
- 9.56 Knowsley and West Lancashire identify new relevant planning applications by running queries through their Development Control databases. Sefton and Halton receive a weekly report on commercial applications. It is noted only West Lancashire operates an ArcMap GIS system. The rest use MapInfo. Should the intention be to maintain collation and comparison at the study area level then this will require conversion in order to be compatible or conversion of Arc files to TAB files via a spatial data warehouse.
- 9.57 The sometimes inaccurate or incomplete data relating to site size appears to be being addressed by the process of site areas being measured using software, rather than relying on information supplied by the applicant. BE Group highlights the value of such an approach and that it accurately reflects the planning application content. BE Group has experienced elsewhere examples of significant calculated errors, e.g. a farm building conversion to employment use of circa 100 sqm defined as being 1 ha of land take-up because the site boundary was drawn (and calculated) for the whole of the farm complex.
- 9.58 It is noted starts and completions are monitored through Building Control records. Sefton and Halton also monitor expired planning permissions where no work has started. This could be extended to the other local authorities.

Table 131 – Monitoring Process – Comparative Table for Local Authorities

Stage	Halton	Knowsley	Sefton	West Lancashire
Identify new relevant planning permissions	Receive weekly report from development control. Exclude irrelevant applications.	Query run annually through Development Control database (UniForm). Query excludes irrelevant applications.	Receive weekly report on commercial applications from Planning Department. Exclude: <ul style="list-style-type: none"> • Non-relevant use classes • Minor applications • Sites under 0.1 ha • Replacement buildings (no change in floorspace/use class) 	Run query through Development Control database (UniForm) every 3 months. Query excludes irrelevant applications.
Match with existing employment sites/create new sites in GIS	Search MapInfo database, add new site ID if required	Search MapInfo database, add new site ID if required	Search MapInfo database, add new site ID if required	Search ArcMap database, add new site ID if required
Add new planning history to database. Also new site history for new sites	Update database fields to add new planning applications and create new sites. Application area taken from planning application form.	Update database fields to add new planning applications, or create new site data entry (see Table 128), save to main database. Site area is measured using GIS software, rather than relying on planning application. Updates take place annually.	Update database fields to add new planning applications, or create new site data entry (see Table 128) save to main database	Update database fields to add new planning applications, or create new site data entry (see Table 128), save to main database. Hard copies kept for site visits. Application area measured using Arc Map. Floorspace is measured using 'Trapeze' software, rather than relying on application data.
Update starts and completions details	Weekly check of commencement list from Building Control. Yearly site visits identify completions and new sites. Justification for this approach is that Development	Annual update monitored through Building Control and annual site visit.	Search planning for permissions where work has been started/completed in the Building Control Database (FLARE). Search for all uncompleted sites on a regular basis. Identify expired planning permissions,	Starts/ completions monitored through Building Control and regular site visits throughout the year (and prior to year end) and updates from NNDR.

Stage	Halton	Knowsley	Sefton	West Lancashire
	Control database only holds commencement /completion data for sites inspected by Halton BC Officers and excludes those inspected by NHBC.		where no work has started. Update database	
Remaining sites identified	Sort to identify remaining supply	Sort to identify remaining supply	Sort to identify remaining supply, to be regularly updated onto PlanWeb	Sort to identify remaining supply, to be regularly updated
Site visits and further updates to database	Site visits conducted 1-2 times a year. Database continually updated weekly	Conducted April to May each year	Conducted 1-2 times a year	Conducted 1-2 times a year
Produce reports on available sites/completions	Available Employment Sites Schedule AMR Indicator Queries (completed by 31 st Dec) RSS Indicator Queries (completed by 31 st Aug) Update NLUD database (ongoing) Submission to Merseyside Information Service Employment Land Compendium produced annually	Available Employment Sites Schedule AMR Indicator Queries (completed by 31 st Dec) RSS Indicator Queries (completed by 31 st Aug) Update NLUD database (ongoing) Submission to Merseyside Information Service	Available Employment Sites Schedule Available Employment Sites Report (detailed one page per site) Employment Land Take-up by Year Schedule Employment Land Take-up by Year Report AMR Indicator Queries (completed by 31 st Dec) RSS Indicator Queries (completed by 31 st Aug) Update NLUD database (ongoing) Submission to Merseyside Information Service	Available Employment Sites Schedule Employment Land Monitoring Report AMR Indicator Queries (completed by 31 st Dec) RSS Indicator Queries (completed by 31 st Aug) Update NLUD database (ongoing)

Source: BE Group April 2009

9.59 Table 132 schedules the information fields used to record site data. Knowsley advise they choose to manually input database reference numbers for sites to avoid confusion in definitions. There appears to be some variance in the degree of

information provided within the 'Plan Allocation' field. Knowsley might wish to expand the data it includes in this field.

- 9.60 Whilst Sefton and Halton record details of the applicant/agent, this is not done by Knowsley. Holding this information is recommended, as it is valuable source for confirming ownership and identifying contacts for future site status checking. West Lancashire source applicant/agent details through UniForm, its Development Control database.
- 9.61 As one of the RSS monitoring requirements is to report on how developments comply with RSS parking standards, Knowsley and West Lancashire have specific RSS parking standards fields in their monitoring systems, which is calculated using floorspace figures. This is not the case with the other authorities. BE Group suggest the other systems be amended to include this.
- 9.62 Again BE Group consider it would be appropriate for all the authorities to record details of the job numbers associated with each development (although the authorities would have to work to ensure that accurate job data was obtained for each application). This data could be used in future to assess employment densities against differing B Use Classes, and whilst acknowledged as being only indicative, could provide an opportunity for comparison of local level experience against the national (and outdated) figures currently applied to economic forecasts.

Table 132 – Monitoring Database, Site Data Recorded by Local Authorities

	Halton	Knowsley	Sefton	West Lancashire
General Site Data				
Database reference number (Linked to GIS?)	Numbering in SQL database access front end. (Yes)	Automatic numbering in Access Database (No)	Manual numbering in Access Database (Yes)	Automatic numbering in Access Database (Yes)
NLUD Reference	No reference held in employment database. Can cross reference with SHLAA, etc	Yes	Yes	Yes
Site address	Yes	Yes	Yes	Yes
Location	Town centre, edge of centre, out of centre	Town centre, edge of centre, out of centre	Town centre, edge of centre, out of centre	Town centre, edge of centre, out of centre
Date record last updated	Yes	Yes	Yes	Yes

	Halton	Knowsley	Sefton	West Lancashire
General Site Data				
Date of last site visit	No	No	No	Yes
Plan allocation	Is it in: Strategic Site? Employment area? UDP Ref.	Is it in: Employment area? UDP Ref.	Is it in: Employment or Regeneration area? Port related area? UDP Ref.	Is it in: Employment area? Other employment area? Non- employment area? Local Plan Ref.
Site location (e.g. easting/northing)	Yes	Yes	Yes	Yes
Area	In hectares	In hectares	In hectares	In hectares
Related Planning Applications/Floorspace Data				
Plan application ref.	Yes	Yes	Yes	Yes
Applicant/agent details	Yes	No	Yes	Yes
Description of proposal	As described on application form	As described on application form	As described on application form	As described on application form
Development type	New build/ conversion/ extension/ change of use	New build/ conversion/ extension/ change of use	New build/ conversion/ extension/ change of use	New build/ conversion/ extension/ change of use
Any goods restrictions in approval	No	No	Yes	No
Decision	Granted/refused	Granted/refused	Granted/refused	Granted/refused
Decision date	Yes	Yes	Yes	Yes
Status of development	Yes	Yes	Yes	Yes
Date permission expires	Yes	Yes	Yes	Yes
Area	In hectares	In hectares	In hectares	In hectares
Use class	Yes	Yes	Yes	Yes
Floorspace (overall size)	Overall figure	Overall figure	Categorise each unit created 0-500, 500-1000, or 1000+ sqm	Categorise each unit created 0-500, 500-1000, or 1000+ sqm
Floorspace (by use class)	Yes	Yes	Yes	Yes
Number of car parking space (Linked to RSS monitoring of car parking standards)	Yes (No)	Yes (also number of disabled and cycle spaces) (Yes)	Yes (No)	Yes (Yes)
Number of jobs	Yes	No	Yes	Yes

	Halton	Knowsley	Sefton	West Lancashire
General Site Data				
Greenfield/brownfield development	Yes	Yes	Yes	Yes
Commencement date	Yes (Monitoring Year)	No	Yes	Yes
Completion date	Yes	Yes	Yes	Yes
Source of completion info	Annual site visits and Building Control returns	No	Building Control Database/site visit	Yes
Other comments	As required	As required	No	As required

Source: BE Group April 2009

Summary

- 9.63 The different approaches used to quantify new employment land requirements produce significantly varying results. The Oxford Economics forecasts suggest a need between 2008 and 2026 for a total increase of only 38 ha for the whole of the study area (Table 127). This disguises an increase in land for office and warehousing use being offset by reduced need for manufacturing. In contrast historic trend data indicates a need for almost 300 ha in addition to the 2008 base supply figure of 508 ha (Table 121). This undersupply more than doubles to over 650 ha when RELS/RSS figures are disaggregated and adjusted to allow for a 2026, rather than 2021, end date (Table 130).
- 9.64 The Oxford Economics forecasts represent the absolute minimum amount that would be needed to accommodate employment sector activities. This is because the figures do not allow for local market churn; the associated need for there to be a selection of vacant premises and sites to offer sufficient opportunities for new business start ups, expansion, relocation and inward investment for a range of business sizes.
- 9.65 Oxford Economics forecasts incorporate labour supply led (forecasted changes in local labour force); labour demand led (forecasted employment change) and 'policy on' (specific sectoral economic growth). However, the approach assumes that sectors which yield a forecasted negative employment change will not generally form a need for additional land. So they are discounted from further calculation. Yet there will be some businesses in those sectors that will want more space. It also presumes

that job floorspace densities and development ratios will remain unchanged into the future. Yet should employment densities fall due to labour productivity growth within manufacturing, then a greater amount of manufacturing employment land will be required than the forecasts assume.

- 9.66 Furthermore, for most parts of the study area new office developments are being focused in business parks and not purely in town centre locations. This means that floorspace and site densities within new developments will replicate those existing developments rather than deviate from them.
- 9.67 Nor do the economic forecast figures have reference to the level and nature of existing employment land supply.
- 9.68 The key consideration for the identification of employment land will therefore be linked to the development vision of the four individual local authorities, as well as the Liverpool City Region within which they sit. And how these visions will relate to employment land requirements.
- 9.69 A high growth vision intimates much higher employment land requirements, and potentially the need to identify new land. A conservative development approach may see employment growth met by the existing supply, albeit subject to the testing of the suitability and quality of sites.
- 9.70 Another element is the concept of providing a buffer of employment land which is additional to the indicative requirements identified from the forecast models. In this respect we have aligned with the RSS 20 percent buffer figure in order to maintain a choice (by quality, size, type and location) of sites on a continuing basis beyond the 2026 LDF end date.
- 9.71 The trend based forecast of land take-up has been assessed from long, medium and short term averages. Analysis of the past 5 years (short term) and 10 years (medium term) shows almost identical trends of around 37 ha take-up per annum for the study area as a whole.
- 9.72 The global figures do however represent differing experiences by the individual local authorities. Halton and Sefton have experienced a rising take-up rate over the past five years. West Lancashire has seen incremental increases from long to medium to

short term. In contrast Knowsley's short term performance reflects a substantial reduction from the preceding periods.

- 9.73 With the application of a 20 percent buffer, to allow for churn and choice, in line with RSS, suggests an undersupply of 358.14 ha against the study area's existing realistic land supply. Whilst all four local authorities are therefore seen to have a shortfall of employment land, the extent of this undersupply varies quite significantly between them, and according to whether long term or short term trends are applied.
- 9.74 A caveat for rolling forward historic trends of take-up is that these may be skewed by significant levels of development, particularly distribution and warehousing, in certain years. There is some evidence of particularly productive years, and although there are differing impacts at individual local authority area level, the study area as a whole sees only a marginal difference in the annual take-up at short, medium and long term trends.
- 9.75 The land requirements generated by this approach are likely to be towards the upper end of the expected employment land need. The extent to which these requirements will be reflective of the land development situation will be shaped by the types of development the study area is likely to accommodate, and is willing to attract, into the future. West Lancashire has indicated that the most land hungry distribution and warehousing type developments are seen as less important to the local economy in the future, and less consideration is to be given to the land required to accommodate any future growth needs associated with such B8 uses.
- 9.76 It is important to plan for new manufacturing development even though as a sector it is forecast to decline. Given the nature of the study area's economy, manufacturing will continue to play an important role. Whilst decline may vary across the study area (trend data suggests Knowsley has in recent times fared worse than others), it will still be important to maintain an appropriate supply of land to accommodate change in industrial requirements and new development.
- 9.77 This chapter has also considered RSS forecasts to 2021 and extrapolated them for the whole of the LDF period i.e. to 2026. A number of alternative scenarios have been tested, such as excluding the 20 percent flexibility factor or using the long term take-up rates established by BE Group (rather than the RELS rates used for the RSS).

- 9.78 Irrespective of which take-up rate source is applied, substantial additional supply is needed for West Lancashire (202-232 ha), Knowsley (182-186 ha) and Halton (172-180 ha). For Sefton the need is between 45-58 ha.
- 9.79 The four local authorities follow broadly similar arrangements for monitoring employment land take-up. There are, for some, minor changes that could be made to improve the quality of the data gathered. These primarily relate to the data evidence fields addressed.

10.0 PUBLIC CONSULTATION ANALYSIS

Introduction

- 10.1 In order to test the robustness of the draft report a period of public consultation has been carried out to maximise the opportunity for stakeholders to comment on, and have direct input to, the study. This has enabled the findings of the study to be substantiated against the practical experience of landowners, property professionals, local community members and regional stakeholders.

Methodology

- 10.2 The draft Joint Employment Land and Premises Study was initially made available for public comment between 25th May 2009 and 25th June 2009. Notification of the public consultation was sent out (by post and email) to the extensive stakeholder contact lists of all four local authorities. The document was accessible from Sefton Council's website, with electronic links being provided from the websites of the three other local authorities.
- 10.3 WLBC subsequently identified that it had failed to provide a number of Call for Sites (CFS) submissions for consideration. In addition, a number of respondents commented that more time was needed to consider such a lengthy and complex report. Consequently it was agreed the consultation period should be extended by two weeks until 9th July 2009. In conjunction with this an updated CFS Analysis was placed alongside the draft study, on Sefton Council's website. All stakeholders were re-contacted and notified of the extended consultation period.

Response

- 10.4 The public consultation generated 88 representations. Of these around one sixth contained comments which relate to the whole of the study area, or are not area specific. The remainder discussed issues specific to an individual local authority area. The representations are broken down as follows:
- General comments – 15
 - Halton specific comments – 5
 - Knowsley specific comments – 9
 - Sefton specific comments – 6
 - West Lancashire specific comments – 53.

- 10.5 General comments have been provided by a range of regional and national stakeholders including 4NW, United Utilities and Peel Holdings. Of the 73 district specific comments, 27 were submitted by (or on behalf of) landowners. The rest are generated from individual local residents, community groups or parish councils.
- 10.6 The full text of each representation is included in Appendix 36 together with individual responses to the issues raised.

General Comments

- 10.7 Of the 15 general comments, eight are of a generic nature i.e. highlighting the importance of considering general issues in the study, without making specific comments on the report or individual employment sites. Examples include the need to consider coal mining data when reviewing existing and proposed employment sites (a point raised by the Coal Authority) or the need to consider aerodrome flight paths in development planning (raised by the Civil Aviation Authority).
- 10.8 In most cases, such issues are beyond the scope of the Joint Employment Land and Premises Study. However, BE Group recognises the importance of such concerns, and acknowledges that they be considered further in the LDF process, before final employment land allocations are made.
- 10.9 United Utilities and the Merseyside Environmental Advisory Service have made a range of site specific comments on existing employment sites and CFS submissions. Where possible the issues raised have been included in Site Proformas and CFS Analyses, although some detailed comments (e.g. regarding waste water drainage) are beyond the scope of the study.
- 10.10 Bellway Homes propose that any surplus employment land supply be considered for housing uses. However, it is not the function of this report to recommend sites for housing. Where sites are suggested for de-allocation from employment uses (and that suggestion is accepted in the LDF), it is for the relevant local authority to consider what alternative use is appropriate.
- 10.11 Peel Holdings have made a number of comments regarding report references to their land and port facilities in Sefton and Halton. The additional input from this key stakeholder is welcomed, and relevant sections have been amended or expanded as appropriate.

- 10.12 4NW confirm they are willing to meet with all four authorities to discuss the RSS figures' disaggregation issues highlighted by the study. Their response raises several points for clarification, which BE Group has addressed both within the text of the report and appendices. In particular Appendix 34 has been restructured to provide a more logical flow to the disaggregation calculations, with appropriate reference included in Chapter 9.
- 10.13 St Helens Council Development Plans Team have also commented on the draft report, although it is noted they do not represent the official view of the Council. Whilst some observations may have been made without full understanding of the brief, agreed methodology and supplied data characteristics, there are valid comments relating to the RSS employment land disaggregation calculations. These overlap to some degree with the views of 4NW, and as stated above, the calculations are now represented in a more logical format.
- 10.14 St Helens also suggest the available land supply would benefit from being further broken down by use class. This has been done at Chapter 2.

District Specific Comments

- 10.15 The district specific comments focus on issues relating to individual employment sites, employment areas, SHLAA or CFS sites. Representations submitted by landowners either approve of Joint Employment Land and Premises Study recommendations for their land or oppose such recommendations, proposing alternative (usually residential) uses. Where representations suggest the latter, BE Group again responds that it is not the role of this employment land study to recommend sites for housing. The uses of any sites recommended for de-allocation from employment will be considered through the LDF process.
- 10.16 Half of the 46 representations submitted by local community members object to study recommendations regarding individual SHLAA or CFS sites, which are seen as suitable for meeting future employment land needs, in particular any proposed release of Green Belt land. BE Group's suggestion that CFS Site, Land at Vale Lane/Spa Lane, Lathom (SK117) be considered for employment uses attracted 21 local objections.

- 10.17 BE Group responds that, in addition to identifying future land needs, the Joint Employment Land and Premises Study must identify a range of possible employment sites which could meet that need. In particular the study looked to review all relevant sites put forward in the CFS process. A further 349.50 ha of previously developed employment land was also identified as being suitable for re-use, across the study area. Nevertheless for some locations, future release of Green Belt land may be the only solution to meeting land needs.
- 10.18 However, site suggestions made by the study are intended to inform planning policy decisions. Future employment land allocations will only occur in the context of the LDF process where issues such as the impact on adjacent communities will be considered further. It is for each local authority to consider whether Green Belt release is an appropriate solution to meeting its employment land needs.
- 10.19 The remaining local community representations reflect a range of topics. Most common were concerns over employment provision (or lack of provision) in their communities and the ability of infrastructure to handle any intensification of employment use. Individual responses to these representations are included in Appendix 36. However, it must also be noted that the study seeks to provide an overall figure for employment land need for each of the four local authorities, and for the study area. It does not seek to quantify what levels of land are required in each community, or discuss detailed local concerns relating to land allocations. Within each district, further work will be undertaken to ascertain where the most appropriate and suitable employment sites should be.

Report Amendments

- 10.20 Where criticisms are judged to be valid and relevant to the content of the study, the Joint Employment Land and Premises Study has been amended. Tables 133 to 137 highlight changes made as a result of representations. Amendments primarily reflect the comments of landowners (or landowner representatives) that have more up to date knowledge about the condition and market status of employment land under their ownership. A number of other organisations (such as 4NW and the Merseyside Environmental Advisory Service) also suggested relevant amendments.

Table 133 – General Representations – Report Amendments

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
Gen_10	Peter Nears, Peel Land and Property	Wirral Council has been included in the list of local authorities that should collectively address spatial and planning issues related to the Port of Liverpool.	Executive Summary. Page 9, Recommendation 15; Chapter 5, Page 107, Paragraph 5.134; Chapter 10, Page 266, Paragraph 10.48; Chapter 11, Page 290, Paragraph 11.57
		Paragraph 5.113 has been amended to note that the 'Post Panamax' terminal is purely a container handling facility, to be developed on land reclaimed from the River Mersey.	Chapter 5, Page 103, Paragraph 5.113
		Paragraph 5.115 has been amended to reflect Peel's observations about the need for CPO powers, partner consultation, and need to relocate established occupiers if land at Regent Road/Derby Road is to be redeveloped for port uses.	Chapter 5, Page 104, Paragraph 5.115
		The Maritime Enterprise Park Employment Area Proforma has been amended to recognise that the area cannot be directly assimilated into port operations.	Appendix 13 'Maritime Enterprise Park – Employment Area Site Proforma
		Paragraph 6.62 has been reworded to reflect Peel's ownership of the Bridgewater Canal.	Chapter 6, Page 140, Paragraph 6.62
		References to potential economic activity linked to the growth of John Lennon Airport, identified in the Airport Masterplan, are now included in the report.	Appendix 4 – Background Documents
Gen_11	David Hardman, United Utilities	Where appropriate, Site Proformas have been amended to reflect United Utilities comments on water supply issues and flood risk.	Appendices 21-24
Gen_13	St Helens Council	Report amended to reflect report completion of the St Helens ELS.	Chapter 6, Page 148, Paragraph 6.101
Gen_14	Rebecca Rutter, 4NW	New paragraph 1.13 states that, unless otherwise indicated, all land areas are gross figures.	Chapter 1, Page 13. Paragraph 1.13

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
		Appendix 34 has been re-structured to provide a better logical flow to the disaggregation calculations. It also now includes the headline supply figures for the four local authorities as identified by RELS (2005) and this study (2008).	Appendix 34
		Paragraph 9.42 has been expanded, introducing a short explanation of the disaggregation calculations. Minor changes have also been made in paragraphs 9.39-9.50 (and associated tables) to distinguish between RELS and RSS.	Chapter 9, Pages 243-247, Paragraphs 9.39-9.50, Tables 124-126.
		Bullet point two, paragraph 9.44, has been amended to make the point it is Knowsley and West Lancashire that see significant uplift in percentage share.	Chapter 9, Page 245, Paragraph 9.44.
		Paragraph 10.90 has been modified to provide greater clarity. The point being made is that company survey identified needs relate only to 2011. Applying long term take up experience for 15 years from then to 2026, and adding the survey needs, produces a total forecast need of 617ha.	Chapter 10, Page 273, Paragraph 10.90.
Gen_15	Merseyside Environmental Advisory Service	Where appropriate, Site Proformas and CFS Analyses have been amended to reflect Merseyside Environmental Advisory Service site specific comments.	Appendix 21-24 and 35

Source: BE Group, 2009

Table 134 – Halton Specific Representations – Report Amendments

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
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Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
HAL_02	Neil Macfarlane	The present use of CFS, Site 10261, East Lane House has been amended to 'Day Nursery' and the Planning Issues column amended to state that the site is suited to employment uses, or uses ancillary to the employment area, as per its current use.	Appendix 35 – Call for Sites Analysis, Halton Call for Sites Analysis
		The Mersey Gateway Regeneration Strategy is now referred to in the Recommendations for Remodelling section of the Astmoor Industrial Estate Employment Area Proforma and in Table 47 of the report.	Appendix 11 - Astmoor Industrial Estate Employment Area Proforma and Chapter 6, page 114-118, Table 47
		The Daresbury Framework masterplanning document is now specifically referred to in the Daresbury Park Employment Area Proforma and in Table 47 of the report.	Appendix 11 – Daresbury Park Employment Area Proforma and Chapter 6, page 114-118, Table 47
		The boundary of Site A, Halton Lea Employment Area has been amended to reflect the outline planning consent which has been granted at East Lane House. This has also been discussed in the Recommendations for Remodelling Section of the Employment Area Proforma and in Table 47 of the report.	Appendix 11 – Halton Lea Employment Area Proforma and Plan and Chapter 6, page 114-118, Table 47
		The Bold Industrial Estate Employment Area Proforma (now referred to as Derby Road/Moorfield Road) has been amended to identify the two sites now developed for housing. Related changes also made in the report.	Appendix 11 – Derby Road/Moorfield Road Employment Area Proforma and Plan and Chapter 6, page 114-118, Table 47 and paragraph 6.25, page 119.

Source: BE Group, 2009

Table 135 – Knowsley Specific Representations – Report Amendments

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
KNO_1	Sonja Swift, Senior Planner, Commercial	Multiple amendments made to the relevant report text, Employment Area and Site Proformas, in relation to comments made on Daresbury	Chapter 6, pages 138-142, paragraphs 6.57-6.54 Chapter 8, pages 171-182,

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
	Developments Projects Ltd, Marshall Holdings	Park and Kings Business Park.	Tables 85-86; pages 190-191, Table 91 and pages 199-203, Tables 97-98. Appendix 21 – Halton Site Proformas, sites 240/0 to 241/3 Appendix 22 – Knowsley Site Proformas, Sites 118, 181, 182 Appendix 27 -Detailed Site Scoring, Halton and Knowsley Site Scoring.
KNO_3	Edward Landor, Edmund Kirby On behalf of client.	CFS Analysis now identifies that the Radshaw Nook Farm (K0231 (CFS39)) has access from the East Lancashire Road.	Appendix 35 – Call for Sites Analysis, Knowsley Call for Sites Analysis
KNO_4	Councillor Ian Smith, Knowsley Council	CFS Analysis now identifies that Maypole Farm (K0232 (CFS40)) is in Knowsley Village.	Appendix 35 – Call for Sites Analysis, Knowsley Call for Sites Analysis
KNO_5	Harry Tonge, Steven Abbott Associates On behalf of James Industrial Limited	Employment Site Proforma Pirelli South, Prescott (175) and Table 86 have been amended to reflect revised ownership and topography details.	Chapter 8, pages 177-182, Table 86. Appendix 22 – Knowsley Site Proformas, Knowsley Site Proforma 175

Source: BE Group, 2009

Table 136 – Sefton Specific Representations – Report Amendments

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
SEF_02	Parish Councillor G Gaskin, Formby Parish Council	Formby Football Club has been removed as a Regeneration Opportunity for Formby Business Park.	Chapter 8, pages 210-213, Table 103; page 229, Table 115. Chapter 10, pages 265-266, paragraphs 10.53-10.55; page 276, Table 134.
		An additional comment has been inserted into the report, recommending that Mayflower Industrial Estate be retained for employment purposes, given the shortage of employment land in North Sefton.	Chapter 6, page 128, paragraph 6.36.

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
SEF_03	Savills On behalf of Cerberus Properties Ltd	Occupancy rates for the Former Philips Factory Employment Area have been amended.	Chapter 6, pages 124-127, table 49. Appendix 13 - Sefton Employment Areas, Former Philips Factory Area Proforma
		The Former Philips Factory Employment Area Grade, has been amended to C/D in light of comments (however, this does not alter the presumption to retain this area for employment uses).	Chapter 6, pages 124-127, Table 49. Appendix 13 - Sefton Employment Areas, Former Philips Factory Site Proforma
SEF_04	Frazer Sandweith, King Sturge On behalf of Philips Electronics UK	Occupancy rates for the Former Philips Factory Employment Area have been amended.	Chapter 6, pages 124-127, table 49. Appendix 13 - Sefton Employment Areas, Former Philips Factory Area Proforma

Source: BE Group, 2009

Table 137 – West Lancashire Specific Representations – Report Amendments

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
WL_01	Nick Eckersley / Hurlston Brook (on behalf of Lathom House and nursery)	CFS Site Lathom House and Nursery, Moss Lane, Burscough (BU079) has been included in the revised CFS addendum, submitted for consultation in July 2009. It is not considered suitable for employment uses as it is a Green Belt site with no links to existing employment areas.	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites Analysis.
WL_02	Roger Clayton/South Lathom Residents Association	The report has been amended to reflect that the remaining employment sites at XL Business Park (Sites DE5.1.14 a, b and c) have outline permission for B1, B2, B8 uses.	Chapter 8, pages 212-215, Table 104. Appendix 14 – West Lancashire Employment Area Proformas, XL Business Park/Extension to Stanley Industrial Estate Appendix 24 – West Lancashire Site Proformas, Sites DE5.1.14 a, b and c
WL_03	Elizabeth-	The report has been amended to	Chapter 8, pages 212-215,

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
	Anne Broad / Lathom South Parish Council	reflect that the remaining employment sites at XL Business Park (Sites DE5.1.14 a, b and c) have outline permission for B1, B2, B8 uses.	Table 104. Appendix 14 – West Lancashire Employment Area Proformas, XL Business Park/Extension to Stanley Industrial Estate Appendix 24 – West Lancashire Site Proformas, Sites DE5.1.14 a, b and c
WL_04	Gareth Jones / Scott Wilson	Changes made to Site Proforma DE5.1.14a, amending its prominence to 'Moderate' and adding the need for a landscaping buffer as a constraint.	Appendix 24 – West Lancashire Site Proformas, Proforma DE5.1.14a Chapter 8, pages 212-215, Table 104.
WL_08	Richard Percy / Steven Abbott Associates	CFS Site Land at White Moss Road South, White Moss Road South, Skelmersdale (SK079) has been included in the revised addendum, submitted for consultation in July 2009. It is not considered suitable for employment development at this time as it is in a green belt area. There are also areas of ecological importance in the vicinity which could constrain development.	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites Analysis.
WL_11	Edward Ledson / Martin Hall Farm	CFS Site Land east of Tollgate Road, Tollgate Road, Burscough (BU081) has been included in the revised addendum, submitted for consultation in July 2009. The JELPS recommends that this site be considered for employment through the future LDF as a possible expansion site for Burscough Industrial Estate.	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites Analysis.
WL_12	Howard Courtley / Courtley Consultants (on behalf of Fine Janes Farm)	CFS Site Land at Fine Jane's Farm, Brookside Road, Halsall (HA01) has been included in the revised addendum, submitted for consultation in July 2009. It is not considered suitable for employment uses as the site is in a green belt area, adjacent to housing, with no links to existing employment areas.	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites Analysis.

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
WL_26	Christie McDonald / Steven Abbott (on behalf of Mainsprint)	The Employment Area boundary for East Quarry has been amended to remove unrelated uses.	Chapter 8, pages 212-215, Table 104. Appendix 14 – West Lancashire Employment Area Proformas, East Quarry Proforma and Plan
		CFS Site The Pad, Appley Lane North, Appley Bridge (AB04) has been included in the revised addendum, submitted for consultation in July 2009. The JELPS recommends that it be considered for wider employment opportunities in the future LDF.	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites Analysis.
WL_41	Jennie Hann / Lambert Smith Hampton (on behalf of Morris Homes and Taylor Wimpey)	The boundary of Briars Lane Employment Area has been reviewed and amended.	Chapter 8, pages 212-215, Table 104. Appendix 14 – West Lancashire Employment Area Proformas, Boundary to be reviewed and amended, regeneration opportunities to be considered. Proforma and Plan
WL_42	Richard Gee / Gee Squared	The Tarlton Mill Employment Area boundary has been amended to better reflect the fact that it contains five additional workshop occupiers, alongside the vacant mill building.	Chapter 8, pages 212-215, Table 104. Appendix 14 – West Lancashire Employment Area Proformas, Tarlton Mill Proforma and Plan
		The Consultee list has been amended to identify that Nolan Redshaw's offices are based in Bury not Liverpool.	Appendix 1 – List of Consultees
WL_43	Margaret Wilshire / West Lancashire District Group of the Campaign to Protect Rural England	Multiple minor amendments made to relevant CFS Submissions	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites
WL_50	Emma Turner / Walsingham	Reference to CFS site Woodlands Works, 542 Southport Road, Scarisbrick (SR19) has been amended to identify that the site is outside the Green Belt.	Appendix 35 – Call for Sites Analysis, West Lancashire Call for Sites Analysis
WL_52	DW	Amendments made to CFS sites	Appendix 35 – Call for Sites

Representation No.	Respondent Name	Amendments Made	Sections of the Report Altered
	Cheetham	SK118-SK123 and SK125 to show that they fall outside of Skelmersdale Town Centre.	Analysis, West Lancashire Call for Sites Analysis

Source: BE Group, 2009

10.21 In West Lancashire a further 17 respondents noted that CFS Site Vale Lane/Spa Lane (SK117) is in Lathom not Skelmersdale. This amendment has been made in the West Lancashire CFS Analysis (Appendix 35).

Summary

- 10.22 Overall, the majority of representations relate to the site specific concerns of landowners, local residents and community/voluntary organisations. Only a small number commented on the sub-regional implications of the Joint Employment Land and Premises Study.
- 10.23 Landowners commented on their preferred uses for land under their ownership, while a majority of community members submitted objections to employment land proposals, which they felt would be detrimental to their local environment if brought forward.
- 10.24 Relevant information on the condition or market status of sites, provided by respondents, has been included in the study where it is seen to be more up to date than BE Group's knowledge. Sections of the report have also been amended in response to the input of key stakeholders, such as 4NW.
- 10.25 However, recommendations regarding the future use of existing or proposed employment sites have not normally been altered in response to comments. In particular the requests of some landowners, to have their sites proposed for housing are not appropriate for this study. The study was asked only to review the existing land supply and propose options for new employment sites. Final decisions on site allocations will ultimately be made in the LDF process, when further consultation with landowners, local residents and other stakeholders will be undertaken.

11.0 CONCLUSIONS

11.1 This study has included a wide ranging look at the factors affecting the economies of Halton, Knowsley, Sefton and West Lancashire, with particular reference to those that are likely to affect the future need for land and property within the four local authority areas. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in the following section.

Economic Profile

11.2 In general the study area shows signs of below average economic performance, reflecting the experience of the wider Liverpool City Region. The number of VAT registered businesses is low compared to the North West, England and UK averages. Job densities are also low. Reliance on large employers is greater than the North West or national experience, reflecting the incidence of high-volume/low-value manufacturing and primary industry activities. Yet 81 percent of the businesses are micro-businesses (less than 10 employees). Home working is increasingly important. Consequently the study area's future employment land and premises strategy will need to directly address the needs of these smaller local businesses.

11.3 The qualifications of the study area's residents lag behind the levels of both the regional and national averages. There is above average unemployment and worklessness and below average economic activity. There is a need to address the levels of deprivation that are a feature of all four local authority areas. There is also a need to grow the local economies to boost business densities and per capita GVA.

11.4 The study area broadly follows wider averages for economic activity in categories such as construction; transport and communications; distribution, hotels and restaurants and other services. There is a slightly higher proportion employed in manufacturing than both the regional and national averages, but significantly more in public administration, education and health.

11.5 Continuing dependence on manufacturing is a particular feature of Knowsley's economy. At over 22 percent this is more than double the national average. Halton and West Lancashire are also 3.5-4.5 percent above the national figure. In comparison Sefton is substantially less than the national average, with just over 6

percent. In all four authority areas the percentage of VAT registered businesses still engaged in production exceeds the national average. For Halton and Knowsley the rate is more than 50 percent higher than the national figure.

- 11.6 Public administration, education and health dominate, with the larger proportion of jobs in this sector in Knowsley, Sefton and West Lancashire. In contrast, finance and business services are poorly represented in these areas, although they represent almost one quarter of Halton's employment.
- 11.7 There will be a need to further diversify the local economies towards office and service-based uses, in line with wider trends and forecasts, if local employment is to be maintained.
- 11.8 There is also a need to respond to higher-level public sector agency plans, including the Northern Way Growth Strategy, Regional Economic Strategy, the Liverpool City Region Development Programme and to local initiatives within individual Community Strategies, which are seeking to directly address these issues.
- 11.9 However, the general study area figures mask contrasts at the individual local authority area levels. Key ones are summarised in Table 138.

Table 138 – Economic Profile Contrasts at Local Authority Level

Topic	Comment
Low Job Density	Only Halton matches North West rate of 0.80. Others are lower with Knowsley being only 0.64
Self Employment Rates	Halton and Knowsley substantially below regional and national averages. Sefton and West Lancashire are above regional figure of 7.7 percent. West Lancashire also better UK figure of 9.3 percent
Unemployment Rates	West Lancashire at 2.5 percent is less than half the NW and UK figures. Bleaker picture for the other areas, with Knowsley having 8.3 percent rate
Business Start-Ups	All lag behind NW and national rates. Knowsley figure of 17 is less than half the national rate. West Lancashire performs best at 29 VAT registrations per 10,000 resident adults
VAT Stock Data	West Lancashire's ratio of 1:25 population better the NW and matches the UK figure. Knowsley at 1:61 has the worst figure in the NW
Economically Active (proportion of working age population)	Sefton and West Lancashire at or above NW 76.5 percent rate. Halton and Knowsley are below

Topic	Comment
Indices of Multiple Deprivation	Knowsley is the 5 th most deprived area in England. Halton is 30 th , Sefton is 83 rd and West Lancashire is 141 st
Working Age Population Qualifications	Over 26 percent in Knowsley lack qualifications. In Sefton it is 15 percent (slightly better than the NW 15.8 percent figure)
Employment Structure	Manufacturing represents 22.2 percent in Knowsley but only 6.3 percent in Sefton. Halton and West Lancashire also exceed the national average of 10.9 percent. Distribution and public administration represent 64 percent of Sefton's employment. For Halton the figure is only 40 percent

Source: BE Group 2009

Property Market Assessment

- 11.10 Typically the industrial market is viewed as stronger than that for offices. This is reflected in the demand level for industrial premises, which is at a level almost twice that for offices. This is generally the case for all the individual authority areas, except for Halton where the ratio is closer to 3:1.
- 11.11 The industrial market remains concentrated in the long established industrial areas, notably South Sefton, Widnes, Knowsley Industrial and Business Parks and the former new towns of Runcorn and Skelmersdale.
- 11.12 The office market has seen development in each local authority area with South Sefton perceived to be successful because of its central location and good access. Developments in the more peripheral locations of Knowsley and Halton are considered to be less successful, though the M56 corridor in Runcorn has capitalised on its accessibility, and proximity to Warrington's office market, to create a critical mass of out of town office space. For Knowsley and West Lancashire there is still a need to establish stronger office location credentials.
- 11.13 The picture drawn from analysis of public sector monitored enquiries is one of domination by Knowsley (40 percent) and West Lancashire (32 percent). In contrast Sefton received only 10 percent. However differences in marketing and promotion may skew the level of enquiries – for example Sefton outsources its enquiry monitoring.
- 11.14 A consistent theme of demand, for industrial premises, offices and sites, is the emphasis on the lower end of the size scale.

- 11.15 There has been limited new inward investment. Successes recorded mainly relate to retained investment and expansion of existing businesses. Halton leads with the number of projects, though Knowsley has seen the most benefit in terms of employment. Sefton, whilst attracting most of the first time investments, has achieved the least projects and least new and safeguarded jobs. No data is available for West Lancashire.
- 11.16 Inward investment enquiries tend to be larger in spatial terms, reflecting the marketing strategy of The Mersey Partnership to attract large inward investors. Industrial demand outweighs that for offices. Demand is spread almost equally between Halton, Sefton and Knowsley. Most enquiries are from elsewhere in the North West, rather than from overseas.
- 11.17 All four local authorities recognise the contribution that business incubation, managed workspace and grow on premises make in assisting start up businesses. Across all the study area there is concern that more provision is needed.
- 11.18 Modern businesses (and developers) want easily accessible, developable and prominent sites. They will move from existing property to provide themselves with better, more efficient, cost-effective accommodation of an appropriate size.

Industrial Market

- 11.19 Analysis of enquiry data indicates the strongest demand has been for industrial units up to 500 sqm. This is true across each of the local authority areas. Only Halton and Knowsley have experienced demand for larger requirements, above 3500 sqm, and these are much fewer in number. Generally there is a good range of supply through each of the size bands. However there is a shortage of small workshops (0-100 sqm) in Knowsley and West Lancashire, and units above 2000 sqm in Sefton.
- 11.20 A slightly different picture of demand is generated from the stakeholder consultations. These suggest that most demand is either from small, local firms looking for leasehold space of up to 186 sqm, or from larger businesses for long leasehold or freehold space above 929 sqm.
- 11.21 There is a shortage of good quality units. This is especially so for West Lancashire. There is also less availability of freehold premises throughout the study area. Freehold demand is in decline due to current economic conditions but remains

significant. Industrial companies still predominantly want moderate quality premises on industrial estates.

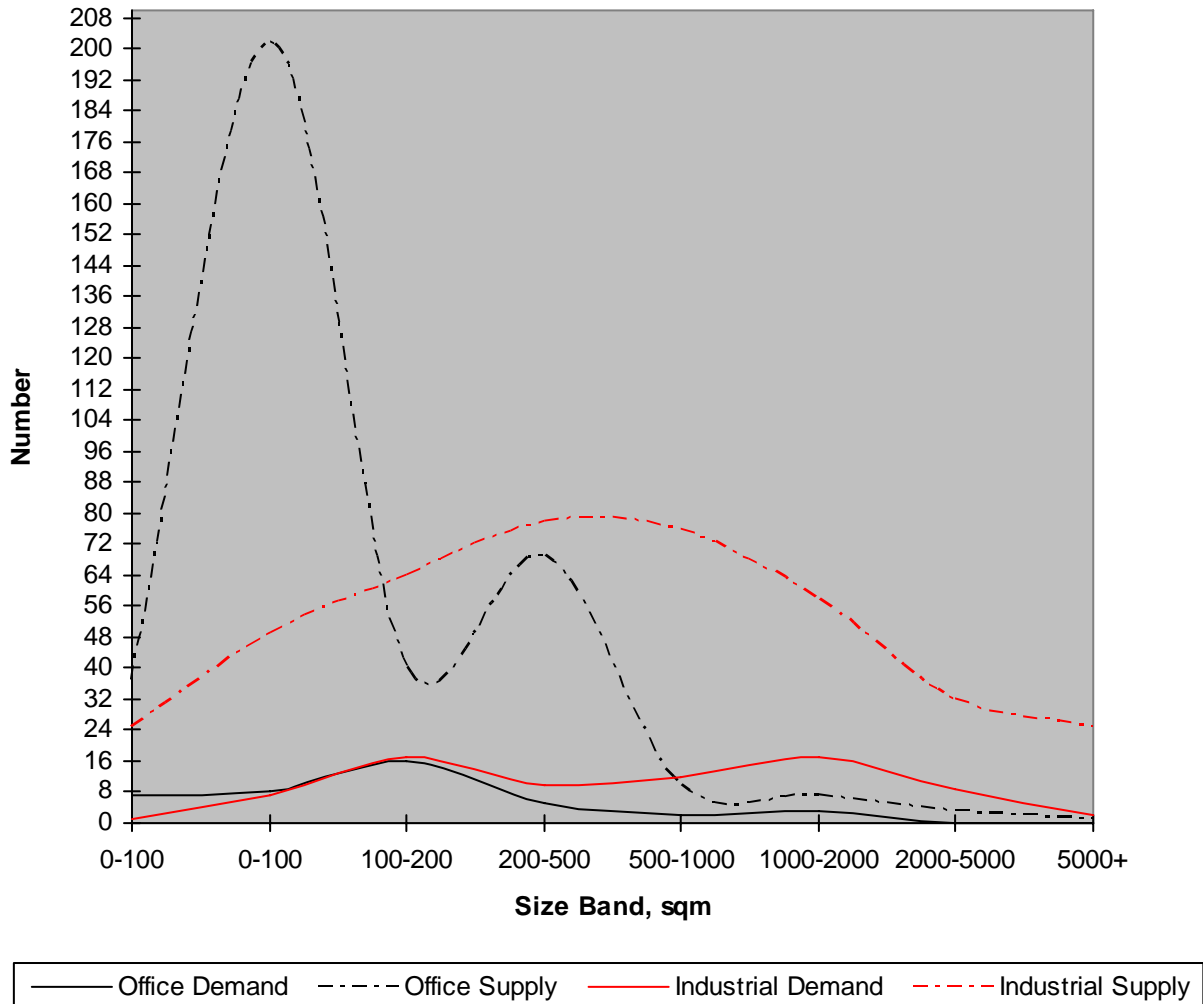
- 11.22 Around 603,000 sqm of industrial floorspace is currently vacant – just over 10 percent of total floorspace and 8 percent of premises. This is higher than BE Group has found in similar studies in other areas, though less than the Liverpool City Region area of Wirral. There are contrasting positions at the level of the individual local authority areas. Sefton’s vacancy rate (for both floorspace and properties) is around 5 percent, reflecting pressure on the overall supply. Knowsley and Halton’s figures are around double this. West Lancashire also has almost double digit vacancy rates for its floorspace and properties.
- 11.23 In Halton both Runcorn and Widnes are seen as having a good supply of industrial space, although some of the lesser quality space is not considered to meet modern occupiers’ needs. This is especially the case at Astmoor and central Widnes. Despite the extensive new industrial and warehouse space at Manor Park and Widnes Waterfront, this does not meet needs for smaller budget space.
- 11.24 Industrial demand in Knowsley is focused on the Knowsley Industrial and Business Parks. Where there are older properties that no longer meet modern requirements. However there are a number of good quality refurbishments, sub-dividing larger units.
- 11.25 For Sefton demand focuses on those areas of South Sefton close to Liverpool and along key transport routes. North Sefton has a lower key industrial property market aimed at meeting local needs, although it lacks budget and moderate quality premises. This latter aspect provides further justification for the retention of existing backland sites in employment use.
- 11.26 Skelmersdale is the focus of activity in West Lancashire. Supply provision is directed at space for large occupiers, and there is a shortage of smaller units (sub 279 sqm) to meet local needs. This strengthens the case for intervention to redevelop older, larger buildings that are no long fit for purposes. Elsewhere Burscough is an established rural employment centre, with full industrial estates and a lack of available developable land.

Office Market

- 11.27 Allied to the economic structural shift towards service sector activity, the Liverpool City Region has experienced a growing office market. This has included some degree of development in all four local authority areas, although the scale of provision varies considerably – as does the degree of success.
- 11.28 Most office demand monitored by the local authorities, is for units up to 100 sqm, with further, more limited, requirements up to 1000 sqm. A different picture emerges from enquiries collated by The Mersey Partnership (although these relate to all Merseyside areas). TMP data shows the greatest demand is for offices larger than 1000 sqm – a reflection of its inward investment attraction role. The view of stakeholders is that most demand is for suites of less than 186 sqm.
- 11.29 Office vacancy rates are 7.6 percent by floorspace and 10.4 percent by number of premises. Again these are higher than those found in previous studies in other areas. There are marked differences between the four authorities. Although Sefton has by far the largest amount of stock (both floorspace and premises) the vacancy rate on both accounts is no more than 4 percent. On the other hand West Lancashire has the least stock, yet has 11 percent of its floorspace vacant – representing 15.5 percent of its office premises. Halton and Knowsley also have high rates of vacancies, in double figures.
- 11.30 The vacancy rates represent 64,911 sqm of marketed space, comprising 333 properties. Over 60 percent of these properties are of 100 sqm or less. There is a shortage of premises of 101-200 sqm, and above 500 sqm. Just over three percent of the stock, by number of premises, is above this latter figure.
- 11.31 There is a reasonable level of available good quality office space, although this is more so for Halton and West Lancashire. Sefton appears to lack such space. Freehold opportunities exist throughout the study area. However provision is limited to a relatively small number of modern business park schemes. For Halton this is Widnes Waterfront, Manor Park and Daresbury Park. For Knowsley it is Kings and Prescott Business Parks. Sefton is supplied by Southport Business Park and the emerging Atlantic Park. West Lancashire has four schemes – Hattersley Court (Ormskirk); Whitemoss Business Park (Skelmersdale), Windgate Business Park (Tarleton) and Merlin Business Park (Burscough).

11.32 Figure 6 balances the requirements identified in the company survey against the premises supply identified by this research.

Figure 6 – Property Supply and Demand (All Areas Totalled)



11.33 Comparison of the level of vacant floorspace in each local authority area, against market equilibrium yardsticks used in other employment land review studies, suggests oversupply in Halton, Knowsley and West Lancashire. In contrast Sefton has current vacant stock levels substantially below the equilibrium rates. This applies to both office and industrial stock. This reinforces the importance to Sefton of retaining for employment use, the borough’s existing allocations and established employment sites.

Current Land Availability

11.34 Tables 89-92 (Chapter 8) provide details of the current land availability in the study

area. The current potential land resource amounts to 507.42 ha, located across 161 sites. The distribution of these employment and development opportunities shows a clear distinction within the study area. Halton and Knowsley each have more than one third of the sites. These translate into the largest shares of the available land. Halton has 41 percent; Knowsley 31 percent. In contrast West Lancashire has only 12 percent of the sites and less than 14 percent of the land supply. Sefton's share is only marginally greater (15 percent of the sites; 14 percent of the land supply).

11.35 The breakdown to individual local authority area is provided in Table 139.

Table 139 – Current Potential Employment Land Availability

Area	Number of Sites	All Employment Land, ha
Halton	62	210.02
Knowsley	54	156.77
Sefton	25	70.73
West Lancashire	20	69.90
Total	161	507.42

Source: BE Group 2009

11.36 The majority of the sites are small. 60 percent are less than 2 ha. Sefton has the highest percentage of sites of this size (68 percent); West Lancashire the lowest (50 percent), although this leaves only 10 sites in the district in excess of 2 ha.

11.37 There is also a good mix of office and industrial land across the study area, and this profile is similar in each local authority area. The overall quality of the sites is good. Around 75 percent are relatively well connected in terms of accessibility. Some 43 percent are of only moderate quality, affecting their marketability. This is particularly so for Knowsley (56 percent of sites).

11.38 72 percent of the total land supply is assessed as not available immediately to the market. Indeed only 16 percent (82.34 ha) is currently being actively marketed. Another 12 percent of the land supply (60.48 ha) is assessed as available but not actively marketed. Only Sefton, of the four local authority areas, has more readily available, than unavailable land in its supply. The lack of available land is most acute in Halton and West Lancashire.

- 11.39 Nevertheless all four authorities comply with RSS guidance that 30 percent of land should be available at any one time (i.e. fully serviced and actively marketed or likely to be in three years).
- 11.40 Some 29 percent of the study area's sites are potentially constrained and unavailable. These represent 18 percent of the total land supply. Reasons for this include retention of expansion land (for owner occupiers); too costly to remediate; already occupied; aspirations for alternative uses.
- 11.41 Although the sites identified as expansion land are not currently available, some or all may in time play a part in meeting company growth or be brought forward for development. Consequently it is only the sites unavailable for other reasons that need to be offset to identify the realistic land supply. These represent 12 percent of the figure, reducing the supply to 446.90 ha. All four areas are affected to some degree. Around 20 percent of Sefton's land supply is at risk (primarily due to alternative higher value use development proposals), which could affect this borough's ability to maintain a credible future supply.

Geographical Distribution

- 11.42 Sub-area analysis in line with the requirements of the study brief shows the following:
- In Halton, Widnes has 52 percent of the sites but almost 60 percent of the land. Runcorn sites are more geared to office than industrial use. In Widnes however potential office locations are limited
 - Knowsley Industrial Park represents about 45 percent of both the land supply and sites in Knowsley. The borough's land supply generally favours industrial development
 - In Sefton, South Sefton has 80 percent of the sites and 76 percent of the total land
 - Skelmersdale, with its legacy of new town allocations and investments has 78 percent of West Lancashire's land supply (65 percent of the sites). And this land resource is more appropriate for industrial development.
- 11.43 Due to the limited availability of employment land in North Sefton, the 'backland' sites associated with residential areas, especially in East Birkdale, serve as an important component of the current supply. Whilst individually small, collectively they are an important resource. Most are already in employment use, or are constrained by issues of multiple ownerships, difficult access arrangements and/or proximity to

residential properties. Given the local employment role performed by these sites, it is important Sefton Council should not automatically assume, or approve, their development for non-employment uses. Notwithstanding this, it is apparent that the emerging draft Strategic Housing Land Availability Assessment is assuming that some of these sites could make a positive, if modest, contribution to Southport's housing supply over the medium to longer term. Clearly Sefton will have to balance these conflicting pressures as it takes forward its Core Strategy.

Commercial Viability

- 11.44 For the majority of the study area (the southern half of Halton is the primary exception) there is a need to address the commercial viability of future employment development. There are signs of a market failure in the balance between the demand and supply of employment-related premises. Much recent development has relied on public sector gap funding to service and remediate land and to make speculative construction viable. Stakeholders are concerned that limits on public funding will further constrain the amount of new space coming forward to the market.
- 11.45 Many stakeholders believe that future development will need to be more aligned to private sector funding led initiatives. The promotion of alternative uses on employment sites would, however, further reduce the stock of suitable, available sites. All four local authorities need to carefully monitor the impact that any new uses would have on the efficient operation of traditional employment activities in adjoining areas. Given the findings set out elsewhere in this report, there may still be a need to ensure that many of the sites affected would continue to contribute towards employment needs.
- 11.46 An additional influence is the introduction by Government of 100 percent business rates payments on empty commercial properties. Even before the deepening of the current economic recession, this was expected to slow commitments to speculative development.

Port Activities

- 11.47 The study area's ports are key facilities, of regional significance. The Mersey Ports Growth Strategy (2006) seeks to build on the creation of Mersey Ports from the merger of Liverpool and Manchester Ship Canal as a key economic driver for the City Region. The main threat to this ambition is the potential lack of available land for

supply chain development, making the retention of land in proximity to port operations a key priority.

- 11.48 This is particularly the case for the Port of Liverpool, which is increasingly constrained with insufficient land to meet projected future needs. Further growth is likely to be difficult without a comprehensive partnership approach between Peel Ports, Sefton, Wirral and Liverpool to address how growth needs could be satisfactorily resolved along the key routes to and from the Port. This will include reconciling port-related functions such as container storage and warehousing, with local authority objectives of improved environments and higher job creation activities.
- 11.49 RSS reinforces this aspect, stating there should be a strong presumption in favour of safeguarding land close to ports for logistics, transport and port-related development. RSS Policy RT6 indicates this applies to the Sefton and Halton ports.

Inter-Modal Freight Terminals

- 11.50 The study area also includes two inter-modal freight terminals – Knowsley rail freight terminal and the 3MG development at Ditton (Halton). The latter is seen as one of the North West's key such facilities. It is specifically mentioned in RSS Policy RT8, which addresses the provision of inter-modal freight terminals.
- 11.51 Notwithstanding that the RSS land projections and recommendations in Policy W3 specifically exclude land for inter-modal freight facilities covered by Policy RT8, consultation with 4NW has confirmed the 3MG scheme should count towards Halton's land supply. This is because inter-modal freight sites were included within the base land take-up figures from which the RSS projections have been calculated.
- 11.52 This has important bearing on Halton's land supply as the planning boundary designation for 3MG includes seven development sites totalling over 95 ha and two established industrial estates – Ditton Road and Speke Approach.

Employment Areas

- 11.53 A total of 92 established Employment Areas have been assessed as part of the review of land supply. They total just under 3000 ha. The assessment has identified that 15.1 percent (443.85 ha) remains available. A further 10 percent (289.64 ha) is viewed as appropriate for regeneration or re-modelling. This is split to Halton (51.0

percent); Knowsley (12.7 percent) Sefton (18.3 percent); and West Lancashire (18.0 percent).

11.54 The retention of the vast majority of the sites is important because they have scope to continue providing local employment opportunities through, and beyond, the period of the LDFs. However two Employment Areas and one Rural Employment Sites (all in West Lancashire) and one Opportunity Site (in Sefton) are considered to be no longer fit for purpose for employment use. They are seen as more appropriate for residential use.

SHLAA/Call For Sites

11.55 The Joint Employment Land and Premises Study has included all SHLAA identified sites relating to existing employment use, as well as all Call For Sites submissions that propose employment as a primary or secondary use. It has also included Call For Sites submissions relating to existing or allocated employment land.

11.56 Conclusions for each local authority are as follows.

Halton

11.57 There is a scope to remodel and regenerate 7.85 ha of existing developed employment land included in the SHLAA. Two thirds of this is in Widnes, providing opportunities for modern developments within Derby Road/Moorfield Road; Moor Lane and West Bank Employment Areas. The remainder is associated with Halton Road Industrial Estate, Runcorn.

11.58 There is potential to deliver some 50 ha of additional employment land supply as a consequence of the CFS representations. All would be in Runcorn, as no suitable proposals have been made in respect of sites in Widnes. The possibilities are:

- Manor Park – two sites, either end of the estate, could enable expansion. 31 ha in total
- M56 Gateway – two sites in conjunction with the western gateway for the M56. Rocksavage and Cholmondeley Road
- Weston – The Pavilions, Sandy Lane. Employment use is considered to be the most appropriate for the site's setting, should Halton Borough Council be willing to accept the loss of the existing playing fields.

11.59 The suggested site at Rocksavage is seen as a B1 office site. The remaining locations would accommodate a mix of B1, B2 and B8 uses.

Knowsley

11.60 SHLAA data indicates 12.09 ha of employment land has been, or is being, lost to residential use. This includes sites within the South Prescott Action Area and land to the rear of Halewood International at Huyton Industrial Park that can only be accessed through adjacent housing area. As such it is unsuitable for employment use and it is recommended that it be de-allocated. Analysis of the CFS data adds a further 1.11 ha loss of employment land due to housing development at Smithfold Walk, Huyton.

11.61 The CFS does identify six sites (K0216, K0217, K0233, K0232, K0349 and K0364) that could contribute to Knowsley's future employment land supply. Five have been proposed to include employment use either as part of mixed use activity, or as an alternative to a preferred residential use. One was proposed only for residential. All six sites are, however, in the Green Belt.

11.62 Three of the sites, totalling 41.47 ha, provide the opportunity for a southern extension of Knowsley Business Park. The location could accommodate a mix of B1, B2 and B8 uses. These sites would, however, if developed significantly reduce an already narrow strip of Green Belt. Two of the five purposes of Green Belt are to check the unrestricted sprawl of large built-up areas and to prevent neighbouring towns from merging into one another. Another purpose of the Green Belt is to preserve the setting and special character of historic towns. The development would affect the character of Knowsley Village which is protected as a Conservation Area.

11.63 An option may be to develop both Halsnead and Cronton Colliery instead of the southerly extension to Knowsley Business Park. The development of Halsnead Park (101 ha) could meet a significant proportion of Knowsley's employment need. The preferred use by the owner, however, is for residential/commercial/leisure uses and is included in the SHLAA study as a site capable of being used for residential purposes. Its potential for employment uses is therefore restricted.

11.64 Cronton Colliery is previously developed, and as mentioned in the Mersey Belt Study (NWDA, 2002) it is suitable to meet the requirements of knowledge based industries. It is, however, isolated from the built-up area. Its suitability is therefore dependent on better physical and transport links to the built-up area being provided.

11.65 The final site, Knowsley Lane Farm, was proposed as part of the CFS for residential purposes. It is, however, seen as a follow on development capitalising on Kings Business Park, providing a quality B1 office park. This could be up to 19 ha in size.

Sefton

11.66 Pressure on employment sites and established employment areas is a feature of both the SHLAA and CFS programme. In North Sefton especially, this is driven by the challenge of identifying new development opportunities, be it for employment or housing.

11.67 As a consequence of the limited land availability within the borough, Sefton needs to take a robust stance to the protection of existing employment site and premises, even where individually these may represent small opportunities. Against this background, the assessment of the SHLAA in terms of residential potential associated with employment sites and employment areas is very limited.

11.68 None of the allocated employment sites should be considered for release for housing. And amongst the established areas, only the following justify de-allocation from employment use:

- SHLAA site 6025 – 7.26 ha at Aintree Curve, South Sefton, which because of its location is not appropriate for employment use
- SHLAA sites 9521, 9522 and 4002 form the People's Site – 9.01 ha of land on this site is to be developed for housing as part of the New Heartlands HMRI Pathfinder

11.69 Only one allocated employment site is promoted in the CFS process for alternative uses. This is site BL131_4 which is referred to elsewhere in this report as a site to be retained for employment purposes.

11.70 Seventeen CFS submissions relate to possible alternative uses for existing employment sites. Fifteen would be residential, two retail. It is considered that six of these sites could be released to non-employment uses. These are:

2080	Daverick Motors, Lydiate	0.32 ha
6026	The Powerhouse, Formby	7.42 ha
6050	Land to the rear of Aintree Hotel, Bootle	0.06 ha

6061	Optimum Contact Solutions, Crosby	2.89 ha
6076	Foul Lane, Southport	0.50 ha
9525	The Dairy Site, Formby	0.09 ha

11.71 Whilst it is noted that Seaforth Nature Reserve is proposed for employment use, this is, as stated elsewhere in the report, the only expansion land opportunity for the Port of Liverpool. It is therefore excluded from the terms of reference of this study.

11.72 Five sites in Southport (CFS Ref 0015, 0161, 6018, 6024 and 6033), suggested for housing, are considered to be important to retain for employment use because of the shortage of provision in North Sefton.

West Lancashire

11.73 Three SHLAA sites are assessed as appropriate for de-allocation from employment use. These are the former LO Jeffs site, School Lane, Haskayne (one of the district's Rural Employment Sites; the Timson's Poultry site, Digmoor Road and former TPT factory, Railway Road (both in Skelmersdale). In all three cases the site locations are no longer considered appropriate for employment uses. Together they total 4.09 ha of land to be lost from employment use.

11.74 Assessment of the CFS data suggests possibilities to bring forward new employment sites at key locations in the district. Sites at Banks and Southport Road, Scarisbrick are considered to be appropriate areas of search that would serve to meet the needs of North Sefton, where there is very limited land availability. Banks could serve as a northern gateway location to Southport. Scarisbrick is adjacent to existing development at Kew, and could possibly be seen as a successor location to Southport Business Park once that is fully developed. The site at Banks extends to 37.8 ha. The Scarisbrick sites (3 adjoining sites) total 6.59 ha.

11.75 Six sites in the vicinity of Burscough Airfield fall into an area of search for expansion of the existing Employment Area provision. Together they total 63.1 ha. All are however in Green Belt.

11.76 Two, again Green Belt, sites have been identified as possible areas of search to facilitate the expansion of Stanley Industrial Estate at Skelmersdale. These total 76.4 ha.

11.77 Other possible sites for consideration, emerging from the CFS process, are opportunities to introduce additional employment sites to serve Tarleton (Plox Brow and Southport New Road, Mere Brow) and provide rural workspace through farm buildings conversion in Scarisbrick.

11.78 It is important to note that the site suggestions made in this section are intended to inform planning policy decisions only. Future employment land allocations will only occur in the context of the LDF process where proposed sites will be reviewed against relevant planning and sustainability criteria.

Impact of Adjoining Areas

11.79 The influence of adjoining and adjacent districts upon the four local authorities employment land supply is difficult to assess. Whilst there are clear linkages in terms of commuter flows (in both directions) there is no evidence that this has been factored into the forecasted employment land provision for these neighbouring authorities. This is certainly so for Liverpool, Wigan and the Central Lancashire authorities of Preston, Chorley and South Ribble.

11.80 The emerging 4NW activity to disaggregate the sub-regional land requirements recommended in the RSS, presents the opportunity for Halton, Knowsley and Sefton to quantify the relationship with Liverpool, St Helens and Wirral. For West Lancashire, as it is included in Lancashire's figure, there will be need to align to discussions on the distribution of that land supply.

11.81 The Omega site at Warrington has been addressed in terms of potential impact on Halton's land supply. It is unlikely to impact, at least for the next five years. There may be need to revisit the situation once plans emerge for the Strategic Regional Site element (130 of the 221 ha).

11.82 Similarly, Halton needs to have regard to the Parkside (Newton-le-Willows, St Helens) rail freight proposal. This will be a direct competitor to 3MG, and as the latter represents almost half of Halton's available land supply, this could be a threat post 2014, should planning permission be secured.

Providing for Structural Change

11.83 The complexities of structural change challenge the forecasting of the scale or nature of future employment land needs through to 2026, especially when what is actually

happening on the ground – where industrial demand continues to outpace office demand for some areas, and the office sector remains comparatively small – is contrary to expected forecasts. The differential between ‘policy off’ (i.e. not allowing for local and strategic planning regeneration policy relating to employment and employment land) and ‘policy on’ (allowing for relevant policy initiatives) is also extremely difficult to quantify. It will require careful monitoring over the period of the LDFs, alongside the need to recognise the redundancy of poor quality employment sites and premises and to encourage the recycling of less suitable older stock to make way for premises better suited to meet modern requirements. In practice, this can only be realistically addressed by ensuring that a good range of suitable sites is maintained at all times to stimulate local company growth, inward investment and emerging industries as well as to provide for choice and for ‘room to manoeuvre’, to enable any necessary structural change to occur.

- 11.84 Structural change will also have implications for the type of land required. Whilst much of the study area has been and is expected to continue to be a manufacturing location, there is need to ensure that future sites and premises provision is better suited to the requirements of the service industry sector. To attract and retain these occupiers, environmental setting, accessibility and provision of support facilities for the workforce, is expected to assume much greater importance as part of the wider need to directly address the quality of the land supply.
- 11.85 In providing for structural change regard should be given to the growth sector opportunities identified for Liverpool City Region – advanced manufacturing and engineering; financial and professional services; creative industries; biomedical; high value added knowledge based industries; ICT/digital, maritime and communications. For West Lancashire there are the additional priority sectors of energy and environmental technologies; chemicals; aerospace and automotive, identified in the Lancashire Economic Strategy.
- 11.86 For Halton the sites portfolio is equipped (or in the case of Widnes Waterfront, being transformed) to accommodate these growth sectors.
- 11.87 Knowsley needs to continue remodelling the Knowsley Industrial and Business Parks, and to bring forward a successor to Kings Business Park if it is to compete effectively in attracting investment from these sectors.

- 11.88 In South Sefton the regeneration within the Dunningbridge Road corridor is providing and should continue to provide appropriate opportunities. In North Sefton, Southport Business Park is geared to accommodating some of the growth sectors but as with Knowsley there will be need to bring forward a successor site during the LDF period to provide a continuum of opportunity. Unless Sefton can identify suitable opportunities in eastern Southport during the medium to longer term, it may require delivery of land in West Lancashire because of the lack of opportunity in North Sefton.
- 11.89 West Lancashire needs to have continuing site provision in Skelmersdale and Burscough (the district's two main employment centres) if it is to attract growth sectors' investment.

Land Need Forecasts

- 11.90 There is no definitive model for forecasting future employment land needs. Typically assessment considers the trend based forecast of land take-up; labour supply projections; forecasts of employment sector change and 'policy on' projections reflecting public sector economic development strategies.
- 11.91 For this Joint Employment Land and Premises Study three forecasts have been considered. Firstly, projection forward of historic take-up rates achieved by the four authority areas. From data provided it has been possible to establish long term (16 years for Halton, Sefton and West Lancashire; 13 years for Knowsley), medium term (10 years) and short term (5 years) trends. Secondly, the labour supply, employment sector changes and 'policy on' forecasts were included in a specifically commissioned forecast produced by Oxford Economics. Thirdly regard has been given to the RSS forecasting methodology. The latter relates to the period 2005-2021, whereas the other two cover 2008-2026.
- 11.92 In addition the company survey results have been extrapolated to generate a picture of demand for the whole study area, albeit only for the next two to three years. The total of 62.5 ha (offices and industrial – paragraphs 7.39-7.40) equates to an annual take-up rate of approximately half that experienced historically. This may reflect the impact of the onset of the economic recession. Certainly the figure does exclude any new inward investment, as the survey reflects the needs of only companies indigenous to the study area. Reverting then to a further fifteen years (2011-2026) at

the average annual take-up of 37 ha achieved during the past 10 years, suggests a combined total requirement of 617.5 ha.

- 11.93 The resulting land requirement scenarios for the whole of the study area are set out in Table 140. They are assessed against both the headline and considered realistic land supply at April 2008.

Table 140 – Land Need Forecasts – Alternative Models

Model	Land Need 2008-2026 ha Surplus (Deficit)	
	Headline Supply 2008 507.42 ha	Realistic Supply 2008 446.90 ha
Trend Based Forecast of Land Take-up	(297.70)	(358.14)
Oxford Economics Forecast	(38.04)	(38.04)
RELS/RSS Forecast – 1 (*)	(652.37)	(740.58)
RELS/RSS Forecast – 2 (**)	(705.16)	(793.37)
Company Survey Impact	(110.08)	(170.60)

Source : BE Group 2009

* Reflects adjustment of actual take-up 2005-08 plus RELS/RSS Annual Take-Up Rate for 2021-26. From Table 126

** Reflects adjustment of actual take-up 2005-08 plus Long Term Take-Up Rates uplifted in line with RELS/RSS, for 2021-26. From Table 126

- 11.94 The trend based forecast of land take-up rates merely reflects and perpetuates recent economic circumstances. This takes no account of the changes in economic activity likely to arise from the implementation of regional and sub-regional initiatives or even individual local authority area activity. Furthermore, there is a view that past take-up rates will have been heavily influenced by how much attractive land has historically been available in each local authority area, rather than investors specifically demanding to locate in the area. A local authority with a large past take-up will therefore inevitably come out as one which is projected to need more in the future. However, this is countered by the fact long term rates have been applied, which even out the peaks and troughs of land quality availability.
- 11.95 The caveats attached to the Oxford Economics forecast, as well as the RSS/RELS forecasting methodology, are set out in Section 9.

11.96 As can be seen from Table 140, from the trend based forecast of land (long term take-up rates) there is an undersupply of employment land to cater for the study area's needs to 2026. This global shortage of between 297.70 and 358.14 ha is broken down to individual local authority area in Table 141. It includes a buffer of 20 percent to allow for churn, to offer range and choice and a continuum of provision at all times. Only Sefton does not have a significant potential shortfall.

Table 141 – Trend Based Forecast of Land Take-Up – Individual Local Authority

Area	Long Term Take-Up Rate pa, ha	Land Required to 2026, including 20 Percent Buffer, ha	Oversupply (Deficit) based on 2008 Headline Supply, ha	Oversupply (Deficit) based on 2008 Realistic Supply, ha
Halton	14.47	312.55	(102.53)	(133.61)
Knowsley	12.73	274.97	(118.20)	(123.83)
Sefton	3.01	65.02	5.71	(7.66)
West Lancashire	7.06	152.50	(82.60)	(93.04)
Study Area	37.27	805.04	(297.70)	(358.14)

Source : BE Group 2009

11.97 In Table 142 the overall land requirements for each local authority area are adjusted to take account of known intervention schemes (e.g. HMR, Mersey Gateway Bridge, Growth Point Bid). They also reflect the implications of applying a market equilibrium rate of 7.5 percent to the current industrial property vacancy rates (explained at paragraphs 4.41-4.44) applied to the standard property development rate of 3900 sqm (paragraph 7.39) to convert to land need/oversupply. Adjustments are also made to reflect de-allocations proposed, or required, arising from the Employment Areas assessment and review of the SHLAA/Call For Sites process.

Table 142 – Trend Based Forecast of Land Take-up – Additions/Deductions Adjusted

Area	Overall Land Requirement (from Table 122), ha	Additions (Deductions), ha	Adjusted Figure, ha
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Area	Overall Land Requirement (from Table 122), ha	Additions (Deductions), ha	Adjusted Figure, ha
Halton	+133.61	(17.37) Oversupply based on 7.5 percent vacancy rate for industrial property 17.38 Land lost to Mersey Gateway Bridge development 14.00 Lost to Mid-Mersey Growth Point Bid housing at Runcorn Docks	+147.62
Knowsley	+123.83	(21.77) Oversupply based on 7.5 percent vacancy rate for industrial property 8.79 De-allocations in south Prescott Action Area	+110.85
Sefton	+7.66	5.34 Undersupply based on 7.5 percent vacancy rate for industrial property 20.25 Land lost to Newheartlands HMR 6.47 Proposed De-allocations from Employment Areas Assessment 0.29 Proposed De-allocations from CFS Assessment	+40.01
West Lancashire	+93.04	(5.82) Oversupply based on 7.5 percent vacancy rate for industrial property 4.04 Proposed De-allocations from Employment Areas Assessment	+91.26

Source: BE Group 2009

11.98 The impact of the adjustments made in Table 142 is summarised as follows:

- Halton's overall land requirement increases by 10 percent because of the loss of almost 32 ha of existing supply due to intervention schemes
- Knowsley's land requirement reduces by ten percent
- Sefton now generates a need for 40 ha of additional employment land
- West Lancashire sees only a marginal decrease in its overall land requirement.

- 11.99 The Oxford Economics forecasts suggest the study area actually needs less land than is already identified for employment use, which would mean that most of the currently vacant employment land (barring a buffer to allow for churn and structural change) is surplus to requirements. However this model is flawed for reasons explained in Section 9.
- 11.100 The RSS/RELS forecast results in a far greater land take need than predicted by rolling forward past take-up rates, but again this appears to be flawed by no account being taken of the sector shift in employment activity.
- 11.101 The conclusion to be drawn is that all four authorities, but especially Halton, Knowsley and West Lancashire, need to replace any land that is lost to alternative uses, as well as expand the overall supply of employment land over their LDF period. Sefton too should be cautious in considering the release of sites, as there is a need to recognise that recent take-up has been below the longer term trend, and this has been influenced by the lack of viable opportunities rather than necessarily a reduction in demand for the area. The loss of existing employment land, primarily to new housing led development, indicates need for additional allocations to replace these sites. And of all four authorities it is only Sefton that has market undersupply in terms of its stock of vacant premises.
- 11.102 The assessment of existing Employment Areas has identified scope for regeneration or remodelling across all four local authority areas. As Table 143 indicates, were all the opportunities to be capitalised on, then this should meet 33 percent of Knowsley's, and 57 percent of West Lancashire's adjusted needs (from Table 142). In Halton and Sefton the potential regeneration areas exceed the additional employment land requirement. However, this is caveated for Sefton by the limited scope and supply in North Sefton. In Halton over one third of the regeneration/remodelling opportunities are represented by the emerging Widnes Waterfront Masterplan and the 3MG multimodal freight interchange.

Table 143 – Employment Land Need to 2026 Compared to Employment Areas Regeneration/Remodelling Opportunities

Area	Employment Land Need (from Table 142), ha	Regeneration/Remodelling Opportunities, ha	Oversupply (deficit) to 2026, ha
Halton	147.62	147.81	0.19
Knowsley	110.85	36.79	(74.06)
Sefton	40.01	53.13	13.12
West Lancashire	91.26	51.91	(39.35)
Study Area	389.74	289.64	(100.10)

Source: BE Group 2009

11.103 From the review of the Call For Sites submissions it is clear there are potential new employment land allocations of a scale to address the shortfalls in Knowsley and West Lancashire. However, this will require amendments to the existing Green Belt boundaries at Kirkby, Prescott, Whiston, Burscough and Skelmersdale.

Approach to Monitoring

11.104 It is important that all Planning Officers and support staff in each local authority understand the importance of monitoring and the systems used to achieve this. Although current perceptions are that protocols are working well, it is important to stress the need to have accurate data at the time planning applications are received for logging into the Council's databases.

11.105 Consequently frontline personnel who log received planning applications need to be aware of the importance of the information collated for monitoring purposes.

11.106 Monitoring also needs to take into account variables such as windfall sites and sites or premises lost to alternative uses. The introduction of specific employment policies in the LDF Core Strategy and Development Plan Documents could generate extra monitoring indicators and mechanisms, particularly if the policy is very specific in nature or location.

12.0 RECOMMENDATIONS

Introduction

12.1 This section sets out BE Group's recommendations relating to the Joint Employment Land and Premises Study for Halton, Knowsley, Sefton and West Lancashire. Some recommendations are generic to all four local authority areas; some are specific to an individual authority.

12.2 The recommendations are grouped around four thematic areas:

- Employment Land Supply
- Spatial Implications
- Provision of Premises
- External Influences.

Employment Land Supply

Employment Land Provision Definition

12.3 Policy W3 of RSS, which provides advice on the provision of employment land, focuses only on B1, B2 and B8 land use allocations. It specifically states that whilst recommended land supply figures include regionally significant economic development, sub-regional and local sites, they exclude inter-modal freight terminals. The 3MG development in Halton is cited as one of the inter-modal facilities excluded from Policy W3.

12.4 Yet the 3MG scheme represents 11 percent of the sites numerically available in Halton, and more importantly 46 percent of the headline land supply at April 2008. BE Group consider it would be illogical to discount 3MG from the supply figure and as consultation with 4NW has confirmed, notwithstanding the wording of RSS, the sites should count as part of Halton's employment land supply.

12.5 Consequently BE Group recommends that Halton Borough Council includes the 3MG sites within its employment land portfolio, and that 4NW are formally notified of this. Also, that this is recognised in discussions relating to Halton's share of the additional land requirement for the sub-region, as set out in RSS Policy W3.

Future Employment Land Provision

- 12.6 Future employment land provision has been assessed based on economic forecasts for the study area; disaggregation of RSS Policy W3 requirements, and the use of trend data forecasts linked to short, medium and long term periods (i.e. 5, 10 and 16 years, except for Knowsley where data limitations mean long term is 13 years).
- 12.7 The economic forecasts link future population (labour supply) and industry sector activity (jobs) and 'policy on' implications to supply calculations. These forecasts suggest that all four authorities will need substantially less employment land than is already identified. This would mean most of the currently available land is surplus to requirements.
- 12.8 However, BE Group does not recommend that the economic forecasts be the basis for defining employment land provision for the LDFs period. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors. Furthermore they take no account:
- That within sectors expected to decline (particularly manufacturing) there will still be businesses that will grow and expand
 - There will be local market churn
 - There will be need to maintain a choice of supply by size, type, location and quality of sites and premises for businesses at differing levels of their maturity
 - There should be a continuing forward supply to accommodate site development beyond the end of the LDFs period
 - Of reference to the level and nature of the existing employment land supply at April 2008.
- 12.9 BE Group recommends that in reality a much larger scale of employment land provision will be required to ensure continuing economic restructuring and growth, and an appropriate sites portfolio, particularly if the long term development rates are to continue in the future.
- 12.10 A starkly contrasting picture of future employment land provision is generated from disaggregation of the RSS Policy W3 (and RELS baseline data) allocations for the Merseyside and Halton, and Lancashire sub-regions. RSS sets increases of circa 28 percent on the level of provision at April 2005.

12.11 Disaggregation indicates challenging, and for some of the authorities very challenging, additional employment land provision. Furthermore these reflect in hugely increased shares of the sub-regional supply required of Knowsley (almost double); and West Lancashire (almost triple). The disaggregated figures are detailed in Table 144.

Table 144 –RELS/RSS Disaggregated Figures 2005-2021

Area	RELS/RSS Land Supply 2005, ha	Percentage Share of Sub-Region	RSS Land Requirement 2005-2021, ha	Percentage Share of Sub-Region	Additional Allocation Calculated, ha
Halton	271.64	22.00	353.57	20.50	81.93
Knowsley	111.86	9.00	278.48	16.10	166.62
Sefton	75.50	6.00	109.44	6.30	33.94
Merseyside & Halton	1234.00	100.00	1728.00	100.00	494.00
West Lancashire	67.51	6.00	237.72	17.40	170.21
Lancashire	1069.00	100.00	1363.00	100.00	294.00

Source: 4NW/BE Group 2009

12.12 Table 144 relates to provision only through to 2021, not the LDFs end date of 2026. Table 145 illustrates the implications for the LDF period if the figures are projected on for a further five years using the disaggregated take-up rates.

Table 145 – RELS/RSS Disaggregated Figures Projected to 2026

Area	RELS/RSS Land Requirement 2005-2021, ha	RELS/RSS Adjusted Annual Take-up Rate, ha	Additional Requirement 2021-2026	Additional Allocations to 2026	
				Against 2005 RSS Supply	Against 2008 Realistic Supply
Halton	353.57	22.10	110.49	192.43	285.13
Knowsley	278.48	17.41	87.03	253.67	214.39
Sefton	109.44	10.68	34.20	68.14	86.28
West Lancashire	237.72	14.90	74.49	244.71	252.76
Study Area	979.21	N/A	306.21	758.95	838.56

Source: 4NW/BE Group 2009

12.13 The evidence of Tables 144 and 145 leads BE Group to recommend that the local authorities do not set RELS/RSS disaggregated figures as the basis for the LDFs employment land forecasting. This recommendation is based on a number of

concerns relating to the RELS/RSS global figures (and how they were calculated) which impact on disaggregation at individual local authority level:

- The RELS/RSS base take-up rates differ from the long term rates established by this report
- The calculations that lead to the significant uplift in the share of provision for Knowsley, Sefton and West Lancashire – best illustrated by the fact West Lancashire is seen as expected to provide almost 60 percent of all Lancashire’s additional employment land in the RSS period
- The actual take-up rates in the first three years of the RSS period (i.e. 2005 to 2008) are at odds with the RELS/RSS base rate projections
- The figures make no allowance for the economic slowdown
- Projecting forward the RELS/RSS forecasts to 2026 is fraught with uncertainty and serves only to exacerbate an already challenging situation
- The simple practicality of delivering such large swathes of additional employment sites without wholesale incursion into Green Belt.

12.14 None of the four authorities have sufficient supply to meet a proportionate share of the guidance figures for Merseyside & Halton and Lancashire, figures which notionally are compounded for Halton, as they are based on the exclusion of inter-modal freight facility sites. Even were the 2008 headline supply figure for the study area, of 507.42 ha, to be applied, this leaves the need to deliver between an extra 472 ha (to 2021) and 778 ha (to 2026) (See Table 145).

12.15 As a result it is also recommended that all four authorities enter into discussion with 4NW, as a matter of urgency, regarding the RELS/RSS disaggregation findings of this study. These pose a serious challenge to the evidence base that must support the LDF documents.

12.16 The study has identified a headline base supply, at April 2008, of 507.42 ha for the study area as a whole. More detailed examination has established a realistic supply of 446.90 ha, which it is recommended the four local authorities adopt as the figure against which future adjustments and monitoring is made (discussed in Chapter 8, paragraphs 8.1 to 8.16, and Table 100). This global figure disaggregates to:

- Halton 178.94 ha
- Knowsley 151.14 ha
- Sefton 57.36 ha
- West Lancashire 59.46 ha.

- 12.17 The reduction by some 12 percent of the headline base supply reflects 47 sites that have been identified as potentially constrained or unavailable for use for some reason (See Tables 98-99).
- 12.18 The four authorities do not therefore have sufficient employment land to meet a roll forward of long term trend take-up, for the new LDF period, when a supply buffer is included equivalent to a further five years take-up. Only Sefton is close to equilibrium, requiring 7.66 ha. The other authorities need between 93 and 134 ha (See Table 142). And the position for Sefton is heavily caveated because of supply issues in North Sefton, which may require early action to find a continuing supply.
- 12.19 BE Group acknowledge that increasing office sector employment will lead to a reduced scale of employment land demand. Getting there is a different proposition. Therefore it is recommended that all four local authorities maintain a buffer zone of at least four years historic take-up. This aligns with Employment Land Review guidance for the need to allow scope for churn, and offer range and choice. It also accords with RELS/RSS supply forecast calculations.
- 12.20 To be safe, the worst-case scenario should be adopted by all four local authorities that all potential land losses identified in the study actually do occur. This means new allocations will be required during the course of the LDFs' period.
- 12.21 The assessment of existing Employment Areas suggests that in part the need for additional land could be met by remodelling of some sites and/or regenerating poor quality buildings that are appropriate for continuing employment use. There is extensive evidence of this already happening across the study area.
- 12.22 Tables 105 to 108 identify where the remodelling/recycling opportunities are located in each local authority area. It is recommended these form the basis for future further investigation, encouragement and prioritisation to ensure employment land provision is maintained. Table 143 indicates the maximum impact that could be achieved should all the opportunities be brought forward. Knowsley and West Lancashire would still require new allocations. Halton and Sefton would have sufficient land.
- 12.23 However it must be recognised that the impact of the credit crunch and the move into economic recession during this study will have implications on short term take-up of employment land. Based on expectations that the economy will recover by 2011, BE

Group recommends the employment land forecasts reflect a reduction of 80 percent in the take-up rate for a three years period to 2011.

12.24 Disaggregating this reduction to each local authority area would mean Halton would be almost at equilibrium; Knowsley's and West Lancashire's needs would reduce to less than 17 ha and 25 ha of new allocations respectively. Sefton's oversupply would increase to nearly 28 ha.

12.25 BE Group therefore recommend that the additional employment land need for the study area reflects the long term trend based forecast of land take-up; includes a 20 percent buffer to allow for range, choice and a continuum of supply post 2026; and as adjusted to take account to known intervention schemes. As set out in Table 142 (Chapter 11), for the LDFs period to 2026, the study area employment land additional requirement should be considered as 389.74 ha (this is in addition to the 2008 realistic supply). This is split to:

- Halton 147.62 ha
- Knowsley 110.85 ha
- Sefton 40.01 ha
- West Lancashire 91.26 ha.

12.26 At any given point in time the local authorities should seek to ensure there is available supply equivalent to the 20 percent buffer (i.e. 5 years supply).

12.27 Disaggregation of the Halton figure would suggest that all the new land should be provided in Runcorn. Historically, over two-thirds of take-up in Halton has been in Runcorn. As a result, both the existing headline and realistic land supplies show that Runcorn has a disproportionately low percentage. There is a need to remedy this, notwithstanding the step change occurring in the Widnes offer that might lead to a greater take-up performance. That the greater need is for Runcorn is reflected in the opportunities promoted in the SHLAA/CFS process. All the new potential employment land sites are in Runcorn.

12.28 It is against these figures that the perceived impact of the credit crunch and remodelling/recycling of the existing Employment Areas should be monitored.

De-allocation of Existing Employment Land

12.29 The assessment of the study area's employment land allocations has highlighted

clear distinction between the perceived and realistically available supply.

12.30 In total 47 sites (60.52 ha) have been identified as potentially constrained or unavailable for use for some reason. This is one-eighth of the land supply. It includes sites for both industrial and office uses. Numerically, in terms of land area and number of sites, Halton has the greatest number. However the greatest impact is in Sefton, where potential land losses to other uses (as opposed to land being held for future expansion), reflect one fifth of the supply.

12.31 Notwithstanding the issues of undersupply in general across the study area, and for each individual local authority, BE Group recommend existing employment land provision is rationalised by de-allocating a number of sites now committed or approved for non-employment uses, identified in Table 146. Also those sites identified in Table 147 as heavily constrained land allocations, should be re-assessed. If found to be unviable, the sites should be de-allocated from employment use.

Table 146 – Proposed De-Allocations – Committed/Approved for Other Uses

Site Ref	Local Authority	Site Name	Size, ha	Reason
302/0	Halton	Catalyst IE, Widnes	1.08	Will be lost to Mersey Gateway Bridge
413/0	Halton	Warrington Road, Widnes	0.30	Residential development
414/0	Halton	Cromwell Street/ Hutchinson Street, Widnes	0.19	Will be lost to Mersey Gateway Bridge
294/0	Halton	Mill Lane, Widnes	0.99	Residential development
334/0	Halton	Appleton Village, Widnes	0.33	Residential development
351/0	Halton	5 Widnes Road, Widnes	0.05	Residential development
366/0	Halton	Lowerhouse Lane, Ditton Road, Widnes	0.18	Will be lost to Mersey Gateway Bridge
401/0	Halton	23 Derby Road, Widnes	0.04	Residential development
412/0	Halton	Demo RMC House, Widnes	0.53	Residential development
237/0	Halton	Manor Park III, Residue, Runcorn	1.26	Now wildlife corridor
184	Knowsley	Kipling Avenue, Huyton Industrial Estate	3.40	No access to industrial estate. More

Site Ref	Local Authority	Site Name	Size, ha	Reason
				appropriate for residential use
DE5.1.27	West Lancs	Ormskirk Hospital	0.24	Residential development

Source: BE Group 2009

Table 147 – Heavily Constrained Sites – Proposed De-Allocations Subject to Viability Review

Site Ref	Local Authority	Site Name	Size, ha
236/1	Halton	Manor Park III, Site 3, Runcorn	0.51
254/0	Halton	Manor Park III, Runcorn (only the northern part is heavily constrained)	4.00

Source: BE Group 2009

12.32 It has been identified that some employment land allocations are being held by their owners with a view to promoting alternative higher value uses. There will also be, over time, approaches for higher value uses to replace employment premises as these buildings reach the end of their economic life.

12.33 As stated above there is a predicted shortfall of employment land for all four local authorities, and the recycling of existing, outdated brownfield employment areas could help to offset this. If premises are no longer fit for purpose it does not necessarily mean that the site on which they are located is no longer fit for purpose.

12.34 BE Group recommends that Halton, Knowsley, Sefton and West Lancashire Councils' planning policy presumption should therefore be against change from employment use, unless this fits with 'policy on' (i.e. specific strategies, actions, policies that will introduce or influence change) initiatives at the particular location, or the site is no longer considered fit for purpose.

SHLAA/Call For Sites Assessment

12.35 Assessment of the SHLAA/Call For Sites submissions received by all four local authorities has identified specific sites and areas of search that BE Group consider could contribute to either meeting the forecasted additional employment land, or helping to address the issue of undersupplied sites to meet industry sectoral change i.e. especially B1 office locations.

12.36 In this respect BE Group make the following recommendations:

Halton

12.37 Specific consideration of either, or both, the Manor Farm (Moore) and Marsh Gate Cottage (Manor Park) sites as opportunities to expand the boundaries of Manor Park.

12.38 More detailed examination of the feasibility of bringing forward the following sites:

- Land at Rocksavage, Clifton Road, Runcorn
- Land East of Cholmondeley Road, Runcorn
- Pavilions, Sandy Lane, Runcorn.

12.39 Collectively these five sites could generate up to 50 ha of new employment land for Halton. All of this would be allied to Runcorn, as BE Group found none of the proposals in Widnes to justify support or further investigation.

Knowsley

12.40 Knowsley Metropolitan Borough Council considers as the area of search for a new B1, B2, B8 use employment site, land to the north east of Junction 6, M62 at Windy Arbor Road, Whiston. There is potential to develop a substantial employment area (up to 100 ha) to augment the borough's existing supply.

12.41 Knowsley Metropolitan Borough Council considers the southward extension of Knowsley Business Park through allocation of some or all of the three CFS submissions associated with Knowsley Lane and School Lane (K0232/233/349). Together these total 41.46 ha.

12.42 The allocation, for B1 office use, of up to 19 ha at Knowsley Lane Farm, south west of Junction 4, M57. This is recommended as a successor site for Kings Business Park which has already established the location as a destination for such use.

12.43 It is acknowledged that all of the recommended locations are currently designated Green Belt. However, they present the best opportunities to bring forward new employment sites, with the least impact on Green Belt.

Sefton

12.44 Sefton Metropolitan Borough Council strongly protect the existing employment land

and premises resource, particularly in North Sefton where the shortages are most acute. None of the borough's allocated or existing employment sites should be considered for alternative uses, despite proposals that may have emerged from the SHLAA and CFS programmes.

12.45 Within the existing employment areas there are a small number of locations where circumstances sustain an argument for release for non-employment use. Some of these locations are already the subject of non-employment development activity. Consequently the following SHLAA sites should be excluded from future considerations regarding Sefton's employment land supply:

- SHLAA site (Ref 6025) at Aintree Curve, South Sefton – 7.26 ha
- SHLAA sites (Ref 9521, 9522 and 4002) at The Peoples site, Hawthorne Road – 9.01 ha to be lost to HMRI
- CFS site (Ref 9525), the Dairy Site, Marsh Brow, Formby – 0.09 ha
- CFS site (Ref 2080) Daverick Motors, Lydiate – 0.32 ha
- CFS site (Ref 6026) The Powerhouse, Formby – 7.42 ha
- CFS site (Ref 6050) Land to the rear of Aintree Hotel, Bootle – 0.06 ha
- CFS site (Ref 6061) Optimum Contact Solutions, Crosby – 2.89 ha
- CFS site (Ref 6076) Foul Lane, Southport – 0.50 ha.

12.46 All other CFS submissions seeking to replace employments activity with alternative uses should be rejected and the sites/premises retained in employment use.

West Lancashire

12.47 West Lancashire is faced with the challenge that if new employment land is to be brought forward it will require adjustment to the existing Green Belt. Five areas of search have been identified and are recommended for more detailed investigation. All are either exclusively or partially Green Belt status.

12.48 The recommended areas of search are:

- Burscough Industrial Estate – six potential sites totalling 63.06 ha, to facilitate expansion of the existing estate
- Stanley Industrial Estate, Skelmersdale – three potential sites totalling 81.62 ha, to enable expansion of the estate

- Banks – site opportunity to create new industrial park at the northern gateway to Sefton, and provide employment land for Southport, to overcome lack of such provision
- Southport Road, Scarisbrick – three adjoining sites with potential to provide employment land for North Sefton, adjacent to the Kew area. This could address the lack of existing provision and serve as the future successor to Southport Business Park. Total area 6.59 ha
- Tarleton – two sites (Plox Brow and Southport New Road) totalling 4.5 ha to create additional employment land serving Tarleton.

12.49 The sites falling within these recommended areas of search are detailed in Table 118.

Managing Supply

12.50 The onus is on the local authorities to provide site allocations that are sufficiently attractive to the market to encourage the private sector to commit significant medium to long term investment in the study area.

12.51 This study has identified the need and scope for remodelling or regeneration of sites within the established Employment Areas in all four districts. It is recommended the local authorities work with the owners and developers of these sites to bring forward mitigation measures sufficient to make them attractive for commercial use. It is acknowledged that in many instances the required resources may be substantial.

12.52 It is recommended that local authorities prioritise funding, and explore other opportunities, through which these allocated sites can be capable of being viably funded, maintained and ultimately delivered by the private sector.

Monitoring Arrangements

12.53 Current protocols appear to be working well, but there are minor changes that would improve the quality of monitoring data and aid future updating of employment land provision. To achieve this BE Group recommends:

- All frontline personnel involved in logging received planning applications be made aware of the importance of the information entered, in terms of the contribution to the evidence base

- The need to take account of variables such as windfall sites and sites or premises lost to alternative uses
- The use of GIS monitoring to calculate land take-up related to planning applications, rather than reliance on application content
- Recording details of applicants/agents to assist in future monitoring of site status
- Recording numbers of proposed jobs, which would provide an alternative, local level job densities yardstick to the still used (but now outdated) national statistics
- An additional data field that relates to the RSS parking standards, to reflect the requirement to report on how developments comply with RSS parking standards.

Future Reviews

12.54 In accordance with RSS planning policy, all four local authorities should review their employment land portfolio at intervals of three years. This is also broadly in accordance with ODPM's 2004 Guidance Note, which states that reviews should be undertaken at intervals of no more than five years.

Spatial Implications

Redressing Poor Economic Performance

12.55 The statistical evidence is that most of the study area is challenged by poor economic performance, lagging behind the regional and national picture shift away from manufacturing to the service sectors.

12.56 Notwithstanding that manufacturing remains an important contributor to the study area's economy, all four authorities need to further diversify their local economies towards office and service-based uses, if local employment is to be maintained. It cannot be assumed that this can be accommodated by the stock of existing sites or vacant premises. The latter is heavily weighted to industrial properties, in contrast to the forecasts that would generate substantial office floorspace need.

12.57 This will require the provision of more quality employment land to deliver the sites, and especially premises, to accommodate these uses. In some cases this may require Green Belt boundary modifications to deliver sites of appropriate size and in

appropriate locations. The LDF will have to consider if such sites should be solely for employment uses or if a mix of uses is preferable.

Assess Strategic Port-Related Land Uses

- 12.58 The study area includes regionally significant port facilities in both Sefton and Halton. Land is a finite resource, with land appropriate for port-related uses even more so. Therefore the retention of land in proximity to port operations is a key priority, reinforced by RSS which states there should be a strong presumption in favour of safeguarding land close to both ports for logistics, transport and port-related development.
- 12.59 Limitations of land supply are a particularly acute problem for the Port of Liverpool. BE Group recommend that together with Peel Ports, Sefton, Liverpool, Wirral and Knowsley collectively address the spatial and planning policy issues that are constraining future growth of the Port and its function as a key economic driver for the North West.
- 12.60 It is also recommended that Halton pursues the production of port master plans for Runcorn Docks and Port Weston, to establish the extent of landholdings to be protected for future port-related activity, before further decisions are made on the release of sites for other uses.

Facilitate a twin track office development policy that sees new investment steered to key town centres and the established edge or out of centre locations.

- 12.61 Economic structural shift places office sector employment as being of greater importance during the LDFs' period. At present, with the exception of Bootle (Sefton), and to a much lesser degree Skelmersdale (West Lancashire) the study area's office market is predominantly founded on edge or out of town centre locations. Evidence from other locations demonstrates town centre and out of town provision address different office market segments.
- 12.62 This assessment has identified a lack of land suitable for office use in particular locations within the study area. These are Widnes (Halton), although the Waterfront development could realise office investment; Skelmersdale town centre (West Lancashire), which has only an indicative, but not site specific, office allocation, and

Southport (Sefton). Whilst Bootle has little remaining town centre land available for offices (only the allocation BL170, Merton Road, remains), there is scope here to refurbish or replace old existing stock because of the past level of investment.

- 12.63 There is currently adequate provision of out of town business/office park development sites in all four local authority areas. All the established parks still have land to be developed, as Table 148 indicates. Sefton is proposing, through the LDF Core Strategy, a 4.51 ha extension to Southport Business Park. This is to be achieved by re-allocation of part of an existing housing allocation. BE Group endorses this proposal as one solution to addressing the limited employment land supply in North Sefton. Consideration should also be given to the possibility of land at nearby Scarisbrick (proposed through the Call For Sites process) serving as a longer term (in the early post 2020 period) B1 office provision to follow on from the Business Park. It should be noted that the lead-in to having a developable site available (e.g. site selection, securing planning, providing infrastructure) means that such a site would need to be identified four years prior to being needed.
- 12.64 For Halton the provision of more B1 office land is an issue for Widnes. The Widnes Waterfront Masterplan area is seen as addressing this.
- 12.65 For Knowsley there is still a challenge of establishing credibility as an office location. To maximise the opportunities for such development there is need to pursue delivery of additional high quality sites to create choice of location, building produce and quality. Areas of search, in addition to existing site provision, should be close to Kings Business Park and Knowsley Business Park.
- 12.66 Particular attention is drawn to Knowsley Lane Farm, adjacent to Jct 4, M57. This is close to Kings Business Park and could capitalise on the emerging critical mass of this area as an office location.

Table 148 – Established Office Park Locations – Land Availability

Local Authority	Location	Land Available, ha
Halton	Daresbury Park	40.32
Halton	The Heath	4.77
Knowsley	Kings Business Park	10.17
Sefton	Southport Business Park	13.17
West Lancashire	White Moss Business Park	8.25

Source: BE Group 2009

12.67 Out of town office parks are clearly important to the study area, and BE Group therefore recommend planning policy adopts a twin track approach that continues to facilitate new office development at established and/or sustainable out of centre locations (such as those in Table 148) as well as in town centre locations. In doing so the four authorities are recognising that office based activity comprises requirements that do not fit to a single location solution.

Employment Sites and Areas To Be Retained

12.68 Tables 146 and 147 identify employment sites that are recommended as appropriate for de-allocation. BE Group recommend that all the remaining sites (included in Section 8.0, Tables 105-108) should be retained for employment uses, or for mixed use incorporating employment where the local authorities have already accepted such a policy change (e.g. Runcorn Docks; Burscough Wharf).

12.69 Particular reference is made to two sites in Table 149. These are sites where the owners, or interested parties, have intimated aspirations for alternative, and usually, higher value uses. BE Group recommend retention for employment use for the reasons set out in Table 149.

Table 149 – Employment Sites To Be Retained Notwithstanding Landowner/ Interested Party Aspirations

Site Ref	Local Authority	Site Name	Size, ha	Reason
BL159	Sefton	Former Peerless Refinery, Dunningsbridge Road, Netherton	5.28	Established industrial site within Dunningsbridge (Port of Liverpool Economic Corridor) Regional Strategic Site.
BL131_4	Sefton	Former Parcel Force Depot, Trinity Park, Orrell Lane, Bootle	2.82	Established industrial site. Developer interest for employment use.

Source: BE Group 2009

12.70 The North Sefton area is characterised by a shortage of employment land and premises. One feature of existing provision is the ‘backland’ sites associated with residential areas in Southport, and particularly East Birkdale. Although individually small, collectively they provide a resource that Sefton Council should through its planning policy, presume be retained. It is acknowledged that the emerging draft

SHLAA is assuming that some of these sites could contribute to Southport's medium to longer term housing supply. Sefton Council will have to balance these conflicting pressures as it takes forward its Core Strategy.

- 12.71 Employment land loss and employment impact has been significant, but necessary to support the HMRI process. Nevertheless, it is also important that Sefton Council ensures a balanced approach with employment opportunities protected in the HMRI area, for the existing and new population. This will ensure HMRI communities are economically viable and sustainable. This could be achieved by windfall employment sites where housing is no longer considered appropriate.

Spatial Distribution of Use Classes

- 12.72 It is generally difficult to predict what sort of employment sector ought to be assigned to each site within the employment land supply. As developments such as Manor Park, Runcorn and Knowsley Business Park have demonstrated, large scale sites can accommodate a mix of uses if the environmental framework is appropriate.
- 12.73 The key objective would however be to separate B2 from B1 and B8 uses; and maintain the high quality of building, especially on the various business parks. It is also prudent to separate B1 office from B1 light industrial and B8 uses, although it is acknowledged with the smaller scale of development opportunity associated with the rural service centres in West Lancashire such separation should be less prescriptive.

Tackle Future Development Viability

- 12.74 Public sector grant aid has been instrumental in bringing forward both employment land and modern premises in most parts of the study area. Premises have largely been speculatively delivered by the private sector with grant aid filling the funding gap. The future will not see this same level of grant aid available, nor will it be as geographically available across the study area. This therefore requires alternative solutions if supply is to be maintained, as financial shortfalls will continue to hamper viable development.
- 12.75 Whilst currently all four local authority areas have sufficient immediately available supply to meet the RSS 30 percent of supply target, none can be complacent about ensuring a continuum of sites readily available for development.

12.76 BE Group recommends the local authorities consider three particular approaches to ensure there is continuing provision:

- Working with other public sector agencies who have employment land holdings in the study area, set a programme for bringing these forward to the market in a remediated condition
- Where justified, allow mixed-use development to fill the financial gap created by reduced public sector grant provision. This will depend on the appropriateness in planning terms of specific sites to accommodate higher value uses, which can then be used to cross subsidise employment land development, it may result in the loss of supply, but could ensure that land otherwise unlikely to be developed does contribute positively to the market
- For Knowsley and West Lancashire, to discuss with 4NW the need for change to the Green Belt to facilitate new employment led development.

Need to Identify a Successor Development to Kings Business Park, Knowsley

12.77 The brief asks for consideration to be given to the need for a successor development for Kings Business Park. The latter has demonstrated that a good quality location and environment can attract office developers and occupiers to Knowsley. It has set new standards for the Borough.

12.78 Although around half of the 20 ha remains available, Kings Business Park has finite boundaries. During the longer term of the LDF period there will be a need to provide a replacement location. This might have been in the medium term but recognising the current economic situation there will be inevitable impact on land and property take-up.

12.79 BE Group therefore recommends Knowsley Metropolitan Borough Council recognises the need to identify a successor development to Kings Business Park, and targets this provision for the second half of the LDF period.

12.80 As already stated, to capitalise on the critical mass established at Kings Business Park it would be best to identify another site in close proximity. However the most appropriate, and identified Knowsley Lane Farm, site opportunity lies within the Merseyside Green Belt. RSS states changes to the Green Belt should be considered through the LDF process, but not before 2011.

Provision of Premises

Business Start Up Accommodation

- 12.81 All four authorities recognise the importance of meeting the needs of start up business, through the provision of business incubators, managed workspace and 'grow on' premises. Across the study area there is concern that more of these kinds of facilities need to be available.
- 12.82 It is recommended each local authority undertakes a more detailed appraisal of the supply and demand for managed workspace and serviced offices within its area, to ensure fit with economic growth aspirations for improved entrepreneurship. There is also potentially a need for more small business space for office use given likely economic trends.
- 12.83 Further feasibility work is suggested, beyond the scope of this Joint Employment Land and Premises Study, because there are a number of existing schemes which seem to be operating with very high occupancy levels. This could look at demand, supply of existing space, and the viability of any schemes in the pipeline. This will ensure there is an appropriate range of space in the correct locations e.g. Burscough, Ormskirk, Skelmersdale (West Lancashire); Widnes (Halton); Southport, Formby, Bootle (Sefton); Huyton, Prescot (Knowsley). If necessary, also consider how such further provision might be delivered.

Premises Provision

- 12.84 Given the strength of continuing demand for freehold industrial units, there should be sites set aside to provide small freehold development plots for owner-occupiers. These could comprise up to 2 ha, providing initially 5 to 10 plots, 0.1-0.2 ha in size on a long leasehold basis to ensure some control to keep the scheme well planned, clean and tidy. The most logical delivery would be the release of public sector owned land.
- 12.85 In this respect West Lancashire Borough Council should work with Lancashire County Council to bring forward such provision on County Council owned land in Skelmersdale. Halton Borough Council should consider similar facilities within its Widnes Waterfront landholdings; Knowsley Metropolitan Borough Council should examine scope for these at Knowsley Industrial Park, where it has landholdings. It is

difficult to see how this might be achieved within Sefton, because of the Council's limited landholdings and the existing development agreements in place.

- 12.86 More workshops for small businesses are required in Knowsley and West Lancashire, in the range up to 300 sqm. Both leasehold and freehold premises are needed. For offices the need across all four authority areas is for premises of 101-200 sqm and above 500 sqm. Sefton particularly lacks good quality office space.

External Influences

Maintain Complementarity with Neighbouring Authorities

- 12.87 As a first point, the four authorities must recognise their role, together with Wirral, Liverpool and St Helens, in developing the Liverpool City Region economy. In this respect they are interconnected, to varying degrees, on a number of levels. Yet the evidence of other similar work in the City Region is that there is room to improve co-ordinated working amongst the constituent authorities.
- 12.88 There is no evidence that employment land needs have considered established economic relationships or cross border issues. The recommended figures for Liverpool and St Helens are pertinent only to their own districts. In view of the evidence of this report regarding the challenges produced by disaggregation of the RELS/RSS sub-regional employment land supply figures, BE Group recommends this is urgently addressed with the other local authorities of Wirral, Liverpool and St Helens (for Halton, Knowsley and Sefton).
- 12.89 BE Group considers there is a need for further work to be undertaken into the connection between economic relationships, especially with Liverpool, and employment land supply. The emerging Ocean Gateway initiative may be one route, in particular for Halton and Sefton.
- 12.90 For West Lancashire it is noted that local authorities in two other North West sub-regions influence travel to work patterns. In the northern rural areas of West Lancashire there is connectivity with the Central Lancashire authorities of Preston, South Ribble and Chorley. The eastern part of the district has connectivity with the Greater Manchester authority of Wigan.

- 12.91 However again this study has established that the recently completed employment land reviews for these authorities take no heed of West Lancashire's economic activity and opportunity. There is therefore scope for West Lancashire to initiate debate with these authorities to discuss the respective employment land and premises assessments, to ensure complementarity is maintained in terms of provision.
- 12.92 Halton abuts the Cheshire & Warrington sub-region. Therefore it is recommended the Council engages with Warrington (land review completed) and the new Cheshire West and Chester authority (land review underway) to ensure complementarity is maintained in employment land and premises provision.
- 12.93 With regards to Warrington and the Omega site, this is not currently seen as a negative impact on Halton's land supply. Phases 1 and 2 of Omega represent local employment land allocations for Warrington. There may be need to review the situation once plans emerge for the 130 ha that constitute the Strategic Regional Site element.